



External Evaluation Memo

OMS Facilitators & Staff Insights on
Scale-Up of CMSI Elementary School Activities

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The conclusions drawn in this report reflect the viewpoint of the authors. While there are many potential viewpoints with respect to a given program, one way to facilitate improvement is through open discussions of such differing opinions within the context of data-based reporting.

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Data Memo:
**OMS Facilitators & Staff Insights on
Scale-Up of CMSI Elementary School Activities**

Information provided by the UIC CMSI Evaluation Project to the
CPS Office of Mathematics and Science

February 24, 2004

The purpose of this memo is to provide a summary of OMS Facilitators and Staff insights on the scale-up of the CMSI Elementary School Initiative. OMS Facilitators and other staff spoke candidly about the following themes they saw as key to a successful scale-up of CMSI activities in the 2004-2005 year. These themes include the roles of personnel in Cohort I and Cohort II Intensive Support Schools (teachers, math and science Specialists, principals), Area Math and Science elementary Coaches, OMS Facilitators and other staff.¹ These also included issues related to Broad Support Schools and to managing math and science materials. Finally, interviewees suggested greater accountability measures for those carrying out CMSI activities and greater focus on strategic organization and planning for the OMS.

Data in this document were taken from interviews with 20 OMS staff members conducted by researchers from the UIC CMSI Evaluation Project between February 9th and February 18th. This document was compiled to serve as a tool in the planning of scale-up activities, bringing together the ideas, understandings and suggestions of individuals who are engaged in various components of the work of the CMSI as OMS Facilitators or OMS Staff.

Several notes should be made about the use and interpretation of this document. First, this is a “translation” memo rather than an analytical one. What appears in this report is a summary of the ideas of OMS Facilitators and Staff members. The evaluation team has provided the framework and organization of these ideas with the purpose of fostering the current discussion on scale-up within the OMS.

Second, we note that additional and deeper analysis of these interviews, interviews with OMS staff members yet to be completed, and other data will take place in the coming months. In that respect this is a mid-data collection snapshot of only one topic of a much broader inquiry around leadership in the CMSI. The full array of data will result in two reports on (a) School Implementation and (b) OMS Leadership Development to be delivered to OMS in August of 2004.

Third, and finally, because this presentation of data is a sketch that was completed with short turnaround and prior to the completion of data collection for this component of the

¹ Schools and school personnel from 2003-04 Intensive Support Schools are designated throughout the memo as “Cohort I” while schools and actors from 2004-05 Intensive Support Schools (2003-04 Readiness Schools) are designated as “Cohort II”.

evaluation, we are necessarily somewhat vague in our identification of the prevalence of the statements and comments we collected. Here, we do not identify the number of individuals who made the statement. As a document not based on conversations with every staff member, each idea may be shared by more than our collected data at this point can represent. As a result, we represent each idea equally, whether expressed by one or many, as a discussion point for OMS planning. Once the full set of data is collected and analyzed, we will be able to consider the prevalence of comments for analytical purposes. At present, this is for discussion purposes.

The data is presented in three forms. In the pages that follow is the “long form” that provides a bullet point for each idea, organized around the relevant actors and strands of the Initiative, with a fuller explanation of the comment. The second document provides an executive summary, in a “short form” (one-page text) and in the form of a summary chart.

OMS Facilitators/ Staff Insights on Scale-Up of CMSI Elementary School Activities “Long Form”

- **Teachers**

- *Training for Cohort I first wave teachers*—First wave teachers going into scale-up need summer leadership and curriculum training to assist them in their new role as leaders in the implementation.
- *Training for Cohort I second wave teachers*--Logic of centralized teacher training conducted by providers was questioned. Suggestion of school-based training of Cohort I second-wave teachers led by Specialists and first-wave teachers.

- **Specialists**

- *Selection*—View that OMS should participate in the identification of eligible candidates for the Specialist position for the Cohort II Intensive Support schools.
 - Those interviewed point to a lack of content knowledge and leadership skills on the part of some Specialists. A lack of content knowledge and leadership skills was described. In some of these cases, interviewees noted that additional content area and leadership training could help; in others, usually due to personality issues and a general inability to work in a productive way with teachers, there was a suggestion for finding replacements.
- *Training (Cohort II Specialists)*— Specialists in the Cohort II Intensive Support schools should receive additional content training in the curriculum that would be implemented in their school.
 - A separate training for Cohort II Specialists in each curriculum, prior to teacher training, was proposed. Specialists in Cohort I Intensive Support Schools were not prepared to support teachers in implementation since they were often not familiar with the curriculum themselves. This can be corrected for Cohort II.
- *Continued Training for Cohort I Specialists*—Summer training for Cohort I Specialists should focus on the nuts and bolts of curriculum implementation and especially on PD to provide Specialists with strategies to be teachers of teachers.

- **Principals**

- *Training (for Cohort II Intensive Support)*—It was suggested that principals in the Cohort II Intensive Support schools should be required to attend content PD around the curriculum of implementation in their school. It was thought that this could be done at the same time as the Specialists, prior to the summer training of teachers. It was noted that this

training should have three components: hands-on work with the curriculum materials (from the perspective of teachers, students, and Specialists); strategies for classroom observations and evaluation of teachers implementing materials; and an overview of the school compliance requirements for continuing support of OMS resources.

- *Training (Cohort II Intensive Support)*—There was a note of a serious lack of support of some principals. There was a recommendation that Cohort I Intensive Support school principals also be required to attend summer workshops. These could overlap with principal workshops for Cohort II Intensive Support School principals. These workshops would have the same goals as the Cohort II Intensive Support Principal sessions, focused on building awareness of curriculum content, understanding of expectations for support of the Initiative, and assisting them to develop skills in observing and evaluating instruction.

- **Area Coaches**

- *Relations with OMS Facilitators*-- OMS staff and Area Coaches (data collected previously) note that coordination of work between OMS Facilitators and Area Coaches at the elementary level is limited. It was suggested that the coordination of Facilitator work and Coaches must be built in for next year through tighter definition of role, common planning time, and shared work. Some individual Facilitators and Area Coaches are coordinating aspects of their work, informing one another about work in schools, sharing Walkthrough information or attending one another's PD sessions, but this is uneven. Perceptions of one another are, at best, a distant respect without thorough knowledge of what the other is doing and at worst, skepticism and disrespect. Those interviewed recommended PD and planning for Coaches and Facilitators and roles that involve ongoing and meaningful work together.

- **OMS Facilitators**

- *New role in scale-up*—A scale-up model was suggested that stressed Cohort I Specialist and First-Wave Teacher leadership and a “triage” approach on the part of Facilitators. It was noted that Cohort I First-Wave Teachers need to be trained to take over the support/mentoring of teachers in their grade level; Specialists would oversee whole school implementation. Facilitators would target the Cohort II Intensive Support schools and those Cohort I Intensive Support schools who were struggling.
- *Role allocation*—It was noted that with scale-up, the distribution of tasks across the office and schools may need to be re-visited. A planning session for the entire OMS staff was recommended where all the pieces of the elementary initiative (taking into account scale-up) are reviewed and individual roles are reconsidered to ensure that work is spread evenly.
- *Networking of Facilitator Schools*—It was suggested that it might be useful to link, in pairs or trios, their Cohort I Intensive Support schools

with Cohort II Intensive Support schools. Facilitators could offer PD for grade levels across the Cohort I & II schools, arrange site visits for teachers in Cohort II Intensive Schools to Cohort I Schools and link the Specialists so that the experienced Specialists can mentor and support new Specialists.

- **Broad Support Schools**

- *Support for Broad Support Schools*— It was noted that planning needs to identify ways to provide more consistent support for schools voluntarily implementing OMS-supported materials. It was noted that moving the Cohort I Second-Wave Teacher training into the school level might make room at general trainings for Broad Support Teachers.

- **Materials**

- *Science*—The use and coordination of science materials in standards-based science assumes knowledge in these curricula. It was noted that in many cases, where teachers are coming from more traditional teaching tools, they do not know the basics of organizing ahead for hands-on science in their room. Science teachers and Science Specialists need training in the basics of organizing lessons, with tips from experienced Facilitators, Specialists and teachers.
- *Science*— More materials should be available for Broad Support school use and at the same time, the available materials are not getting the kind of use they could be. It was suggested that more can be done by OMS staff to spread knowledge of what is available for schools. Coordination needs to occur between the various arms of science in OMS around this issue.
- *Math*—Problems exist with curriculum vendors around PD being offered (one in particular)—accountability needs to be addressed here.
- *General*—Can the ordering and purchasing of materials (or portions of it) be centralized and organized at the system level?
- *General*—greater knowledge of how to work with CPS budgets. Concerns about Logistical issues such as line-iteming materials.

- **Accountability**

- *Cohort I Intensive Support Schools*—It was suggested that schools not following through with “an honest effort” at implementation should be given a warning and/or dropped from support as CMSI schools. It was stated that schools are using the curriculum as a supplement or only a few days a week. It was noted that there are some First-Wave Teachers who were coerced, and so they are not implementing. A review, warning, and removal system was suggested.
- *Cohort II Intensive Support Schools*—It was suggested that accountability should be more clearly built into participation. Principals should be given specific consequences for non-compliance such as when teachers are not implementing, when teachers are not in attendance at curriculum PD, or when principals are not in attendance at principal meetings.

- *Specialists*—Similarly, it was suggested that Specialists who were found to be negligent in their duties should be reviewed, warned and/or replaced.
- *Area Coaches*—It was suggested that roles need to be solidified and accountability measures put into place to ensure compliance.
- *OMS Facilitators*—It was noted that roles need to be solidified and accountability measures put into place to ensure compliance.

- **OMS Staff Organization**

- *Curriculum Professional Development*—With the scale-up, and the increase in the amount of PD that will be offered across all curriculums, central coordination of PD will be a much bigger undertaking. This was noted as something that should be taken into account in staffing.
- *Increased Leadership of Boundary Spanning Roles*-- Those who work both in the OMS in planning or coordination roles and also within schools have boundary spanning roles that are key to thinking about scale-up. It was noted that their direct representation on the OMS Leadership Team may provide greater coordination in OMS.
- *Coordination and oversight*—Concerns were expressed about the coordination of the many components, programs and pieces of the CMSI—elementary and high school. A full-time focus on coordination and oversight of the entire Initiative including all aspects of elementary and high school programs was thought to be necessary to the coherence of the whole and to the success of each strand of the Initiative.

- **Planning Questions**

- *Revisiting the PURPOSE of CMSI and scale-up*—It was suggested that there should be a return to the overarching goals of the Initiative. These should be re-established, discussed, and tweaked based on new understandings. Then, use these understandings to look at implementation and scale-up process. Are we still being consistent with goals and purposes of CMSI?
- *Revisiting understandings of Scale-up*: In schools of different sizes, levels of implementation, skills of Specialists and commitment, should the time taken to scale-up be expected to be the same? Are we spreading resources too thin to be effective knowing that it takes longer than two years to promote school-level change?
- *PD for ALL including the change process*—Is there enough focus on the change process in the training of Facilitators, Specialists, Principals, teachers, etc.? It was noted that in order for each group to promote implementation and change, in order for each to feel successful, it is important for all to be trained to understand that the process takes time, both in themselves and in those they are supporting.