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ABSTRACT

Since 1992, the New American Schools Development Corporation (NASDC) has supported nine teams that developed designs for high-performance schools. This workbook is a guide developed for NASDC and for school-based reformers. It presents a framework for student and program evaluation called progress assessment. Chapters 2 through 5 provide suggestions, examples, and worksheets for evaluating school-reform programs. The progress-assessment framework is comprised of three steps: (1) specify program goals; (2) designate indicators of school change and program impact; and (3) define methods for data collection and analysis. Chapter 6 offers a template for developing school-reform portfolios, which promote accountability and continuous school improvement. The template has five sections: a statement of the school's vision and reform objectives; a description of the student population, school, and community; descriptions of initial implementation levels, early outcomes, and subsequent performance indicators; a summary of reform progress and challenges; and appendices that display supporting data. Three figures and three tables are included. The appendix contains the George Washington New American School portfolio for 1993-94. Contains 18 references. (LMI)

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Charting the Progress of New American Schools: Creating a School Reform Portfolio

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PREFACE

CREATING NEW AMERICAN SCHOOLS

In July 1991 at the behest of President George Bush, American corporate and foundation leaders launched the New American Schools Development Corporation (NASDC) to promote urgently needed change in our nation's public education system. NASDC supports nine Design Teams who have developed and are implementing comprehensive designs for high-performance schools. President Bill Clinton strongly endorses NASDC and the Design Teams' work.

NASDC believes that schools and students should not be treated as assembly-line products. The nine designs represent unique philosophies and varied, but proven education practices. Further, these designs are responsive to the needs, values, interests, and capabilities of the schools and communities they serve. However, unifying NASDC's diverse designs is a firm set of essential principals; these, in NASDC's view, are the building blocks of whole-school reform:

- High academic standards
- Strong and fair accountability and assessment measures
- Curricular and instructional strategies that include thematic, project-based, and interactive learning
- Continuous professional development for teachers and staff
- Service to, and strong support from, parents and the community
- School autonomy and decentralized governance structures for more efficient operations
- Integrated use of technology to enhance the performance of students, teachers and schools

NASDC Design Teams soon will be working in selected jurisdictions to help states and districts create transformed schools. As schools in these jurisdictions begin their work, NASDC reasserts its commitment to

accountability and to strong and fair assessment--for students and schools.

This guide was developed by RAND for NASDC and those propelling NASDC and other design-based transformations. It rests on the reform expertise of school-level participants; the discussion is aimed at reformers who want to know more about assessing their progress. *Charting Progress* is designed to help school-based reformers examine their work, create longitudinal records of progress, and drive continuing program improvement. The school portfolios that result will provide a wealth of information for teachers interested in improving their practice, for school administrators and parents striving for better schools, and for business and community leaders committed to supporting strong school programs. This workbook is a tool for assessing and portraying school transformation.

CONTENTS

TABLES

SUMMARY

Those who seek to reform schools -- teachers and school-building staff, administrators, and funders -- inevitably face the difficult dilemma of demonstrating to skeptical parents, community members, and boards that the reform is proceeding well and that student performance is improving. Pressures to evaluate a reform effort are nearly immediate, despite the fact that most agree school transformation is time-consuming. Mandated assessments that are components of state or district accountability systems often provide what is taken to be an evaluation, but such assessments frequently are poorly aligned to the intent of the reform and premature in their timing. More than one reform effort has been derailed by either such premature, mis-aligned assessment or by a failure of reformers to take seriously the need to portray the progress that reform efforts are making.

The New American Schools Development Corporation (NASDC) has faced this difficulty. For the past three years, it has supported nine teams who are developing designs for high performance schools. On the whole, these designs involve curriculum, pedagogy, school organization, and management practices that differ from what is commonly found in the nation's schools. Each has been in a state of development, so that during the past several years it has been difficult to identify stable elements of schooling that could be assessed. Yet, quite reasonably, potential adopters of these designs are anxious to know whether they "work."

RAND, which is responsible for assessment for NASDC, has wrestled with this dilemma. It has sought a means of assessing the progress that a school site is making, a vehicle that would provide a meaningful statement to the wide variety of parties to the reform. It also has sought to create an assessment procedure that would support the school itself in reform. Our proposed solution takes the form of a framework for a portfolio that would be prepared and maintained by the school. This report provides the initial specifications (in the form of a

workbook) for such a portfolio and illustrates these specifications with examples from the NASDC design efforts.

The first level objective of the workbook is to help whole-school reformers marry the work of reform with the analysis of change. Again, it presents a framework for assessing and portraying school transformation. The framework is directed at helping school-level reformers examine their work, create longitudinal records of progress, and drive continuing program improvement. The **school reform portfolios** thus created additionally provide a form of accountability to the community, administrative elites, and funders. Over time RAND hopes the portfolios can be analyzed collectively to provide a rich assessment of the overall NASDC-supported effort.

We term the student and program evaluation framework outlined, here, **progress assessment**. The assessment assumes the school has at least some sense of the goals that it seeks and the means by which these goals will be achieved. In the case of NASDC's designs, these goals and means are either a part of the design specification or generated in the early processes that the design teams suggest. For other reform efforts, they would be the products of the early planning a school goes through as it decides on a reform path. Given these, progress assessment poses questions that school-based reformers undoubtedly ask themselves as they go about their work and seek to improve their programs. These questions include:

- Are program elements being implemented and are they observable in the school?
- Are participants (students, teachers, parents, administrators) making progress in relation to the program's goals?
- Which activities and strategies are aiding participants' progress toward reform goals?
- Which activities and strategies are impeding progress toward program goals?
- Are students and adult participants benefiting from program activities and strategies?

- What do progress levels (and aids and impediments) suggest about upcoming work and continuing program improvement?

This workbook consists of two components. The first provides suggestions, examples, and worksheets for use in assessing progress; the second offers a template for developing school reform portfolios. The framework for assessing progress supports reformers in engaging stakeholders in all stages of the progress assessment.

Progress Assessment

The workbook walks reformers through three steps: it talks about specifying program gcals, designating progress indicators and benchmarks, and planning data collections and summaries. The first step asks reformers to lay out statements of their reform goals and objectives. It instructs them to specify objectives in major program areas, including for example, standards and assessment, curriculum and instruction, school organization, teacher professional development, technology use, school governance, family and community services, public engagement, and school/system/designer partnering. Reformers also are asked to state their broad aims for improving student performance and strengthening school programs; these statements cut across program areas and speak to objectives such as, improving attendance levels, reducing drop-out rates, and broadening parent involvement.

At step two for each objective, reformers are asked to specify indicators of school change and program impact. The workbook describes three categories of indicators: implementation observables, participants' judgments, and outcome indicators.

- Implementation observables are observable manifestations of design components; they are things observers can see in the school building that suggest the program is initiated and on its way.
- Students', teachers', administrators', parents', and designers' judgments also are important inputs for progress monitoring; student and adult participants can offer perspectives on, for

instance, design clarity; the quality of program guidance, resources and activities; and the presence of early (then ongoing) program benefits to students and others.

- Outcome indicators speak to the direct impact of reformers' work; they talk about the impact of program efforts on students, teachers, and others and rely on measures, for example, of student performance, effective teaching practice, and family support.

Step two additionally asks reformers to specify benchmarks for important indicators at key points in the program's life.

Finally, step three calls on school-based reformers to define the means by which data will be gathered. It asks them to consider a mix of qualitative and quantitative approaches to information-gathering, including observables inventories, surveys, interviews, focus groups, student performance assessments, portfolios and projects, teacher logs, and/or progress rubrics. Descriptions and sample instruments appear in the workbook. Methods for examining and summarizing the data that result also are discussed.

School Reform Portfolios

The second part of this workbook provides a template for developing a school reform portfolio which is fundamentally a documentation of the progress assessment just outlined. The portfolio template has five sections; it includes:

- A statement of the school's vision and objectives for reform,
- A description of the student population, school and community,
- Descriptions of initial implementation levels, early outcomes, and--over time--later indicators of progress and program effects,
- A summary of reform progress and challenges, with recommendations for future reform work, and
- Appendices, providing data displays to support the body of the portfolio.

As conceived here, the third section of the reform portfolio--the description of implementation levels and outcomes--provides three levels of information. The top level gives a short, directed portrayal of the most important information about implementation and outcomes. The second level gives a more extended, descriptive and qualified discussion of the data and their context. The third level includes case study information, narrative data, or sample materials to illustrate and make richer the information provided in the top level. In comparison to traditional evaluation reports, this format permits a more comprehensive, faithful portrayal of whole-school reform. A sample portfolio appears in Appendix A of the workbook.

Conclusion

The school reform portfolio is intended to serve several audiences and address varied objectives. At the local level, it will provide a vehicle for deliberation about school reform. The school portfolio will describe the work of participants at key points in time and set the agenda for ongoing school improvement. It is intended to support a process of **continuous school improvement**. The reform portfolio also will provide important accountability information to program stakeholders; it will document the extent to which expected progress and outcomes are attained. The school reform portfolio will record for participants and stakeholders alike things examined, refined, and learned.

This workbook advances the notion that school reform portfolios will contribute to the evolving knowledge base about school-wide reform. For schools attempting to emulate reform programs, portfolios may provide guidance and, perhaps, suggest realistic expectations for the pace of school change. For funders of reform, portfolios may provide guidance for program development. For policy makers seeking to advance school transformation, reform portfolios may be useful in policy formulation. For researchers, collections of portfolios may provide valuable insight into the aids and barriers to school improvement inherent our current education system.

1. INTRODUCTION

CHARTING THE PROGRESS OF NEW AMERICAN SCHOOLS

This workbook is a guide developed for the New American Schools Development Corporation (NASDC) and for school-based reformers. It is designed to help whole-school reformers marry the work of reform with the analysis of change. This workbook presents a framework for assessing and portraying school transformation. The framework is directed at helping school-level reformers examine their work, create longitudinal records of progress, and drive continuing program improvement.

This guide offers suggestions, worksheets, and models for examining and documenting student and school progress. It presents a student and program evaluation framework called **progress assessment**. Additionally, it promotes **school reform portfolios**--as vehicles for monitoring and managing school transformation, for accountability to stakeholders, and as a means of reporting to those sponsoring and committed to school reform.

THE CONTEXT FOR PROGRESS ASSESSMENT

Some of the data that progress assessment and reform portfolios draw on are coincident with those being collected in NASDC jurisdictions. These states and districts, like many others, gather data about student needs, school resources, student performance, and school performance; the data are collected to several ends. They, most simply, are used in administrative control of schools and systems. They also are used by jurisdictions to monitor student and school performance. They allow systems and the public to hold schools accountable for decisions made about teaching and learning and actions taken on behalf of students. These accountability judgments sometimes are supported by data on the performance of comparable or politically relevant groups. Sometimes they are linked to judgments about students' expected mastery of knowledge and skills. The best statements about school effectiveness, however, reference schools' goals, relate observed

student and school performance to progress benchmarks, and feed data into local improvement plans. It is these comprehensive systems for indexing school improvement and accountability that progress assessment most closely mirrors.

Progress assessment poses questions that school-based reformers ask themselves as they go about their work and seek to improve their programs. These questions include:

- Are program elements being implemented and are they observable in the school?
- Are participants (students, teachers, parents, administrators) making progress in relation to the program's goals?
- Which activities and strategies are aiding participants' progress toward reform goals?
- Which activities and strategies are impeding progress toward program goals?
- Are students and adult participants benefiting from program activities and strategies?
- What do progress levels (and aids and impediments) suggest about upcoming work and continuing program improvement?

These questions direct reformers' assessments of school progress. Their answers are the subjects of school reform portfolios.

THE NEED FOR PROGRESS ASSESSMENT

The progress assessment framework derives from the work of NASDC's partners and from RAND's observations of school change. It rests on the following assertions:

- At the heart of program improvement are efforts to track implementation progress and examine outcomes. It is not unusual for school-based reformers to defer evaluation and focus their energies on development, initiation, and implementation. In the absence of early and deliberate attention to program assessment, however, baseline data and the

mechanisms for capturing relevant information over time are unlikely to be available. In their absence reformers will be handicapped in attempts to examine and speak crisply to progress. More importantly, they will be impaired in addressing challenges and recommending program improvements.

- It is important that participants and stakeholders hold common expectations for the work and progress of school reform. Reformers should offer participants and stakeholders an opportunity to debate where the program is going, how it is getting there, and how long it will take. By making explicit their hopes for the program, reformers help establish shared expectations for school progress and program outcomes.

- The performance of transforming schools is most meaningfully assessed in relation to reform intents and design features. Evaluation plans should faithfully address reformers' goals; they should track the implementation of design components, the program's early outcomes, and--as the reform matures--more numerous and telling indicators of school progress and program effects.

- The most telling descriptions of school progress are provided by broad, comprehensive systems of indicators. Reformers should specify multiple and varied indicators of student progress and program effectiveness. Evaluation should elicit balanced information about students and the school--using metrics and criteria important to participants and stakeholders. By making explicit the range of intended outcomes, reformers help thwart stakeholder attempts to hold up high student test scores as the only hallmarks of educational success. Reformers prepare the canvas for a more complete painting of school progress; the broad involvement of stakeholders offers assurance of a faithful rendering.

- It is essential that participants and stakeholders discuss the rate at which progress is expected. By specifying benchmarks for progress, reformers preview the milestones for change. Reformers can discuss the slow, often stop-and-go pace of school-wide change; they can alert participants and observers to the possible early dis-equilibrium of reform. These discussions promote shared expectations for the rate at which student success and program maturity likely will be observed.

- Progress assessment and school reform portfolios provide important and necessary accountability information. In addition to their role in program improvement, progress assessment data are important to numerous stakeholder audiences, including state and district staff, boards of education, parents, community members, funders and fellow reformers. They serve to document reformers' efforts; they record the extent to which expected progress and outcomes are attained. Progress data may help state and district sponsors as well as funders like NASDC, Annenberg and other reform-minded foundations and corporations (1) formulate policy to help transforming schools advance more quickly and effectively, and (2) present to the public the collective efforts, accomplishments, and lessons of reforming schools.

This framework asks reformers to chart their course to whole-school transformation. It asks stakeholders to engage in deliberation about the journey and destination. The *New American Schools Reform Portfolio* records for participants and stakeholders alike things examined, refined, and learned. Portfolios describe the work of participants at key points in time and drive continuing program improvement. They portray initial implementation levels, early outcomes and--over time--later indicators of progress and program effects. They help establish the agenda for ongoing school improvement and promote fuller and continuing understanding of reform progress for present and future transforming schools.

The progress assessment framework and format of this guide are described next.

2. CHARTING SCHOOL PROGRESS

PROGRESS ASSESSMENT

The progress assessment framework was inspired by the NASDC experience. It speaks to the varied, but synergistic elements of whole-school reforms. This workbook is designed for those propelling NASDC and other design-based transformations. It relies on the reform expertise of school-level participants; the discussion is aimed at reformers who want to know more about assessing their progress.

The progress assessment framework calls on school-based reformers to lay out and execute plans for assessing progress and develop reform portfolios to portray school transformation. In assessing progress, it asks reformers to:

- Create shared expectations among participants and stakeholders for the program's goals, progression, and intended outcomes,
- Agree upon indicators and benchmarks for design implementation and program outcomes,
- Gather information about students and their school prior to program implementation--as a baseline for assessing progress,
- Identify strategies for collecting on an ongoing basis varied and rich data about progress in relation to reform intents,
- Specify data sources, data collection timelines, and mechanisms for managing early and ongoing data, and
- Marshall and summarize quantitative and qualitative data about school transformation.

In developing and using reform portfolios, the framework calls on school-based reformers to:

- Create accounts of the most important and telling data about implementation and outcomes,

- Develop rich records of progress by illustrating student and program data with case study accounts, narrative data, and sample materials,
- Create longitudinal records of student and program progress,
- Identify program strengths and challenges, as well as, aides and barriers to reform,
- Realign program goals and upcoming work where the data recommend it and, thereby, drive continuing program improvement,
- Provide important and necessary accountability information for participants and program stakeholders, and
- Promote fuller and continuing understanding of reform progress for present and future transforming schools.

WORKBOOK FORMAT

This workbook has two parts. The first gives suggestions, examples, and worksheets for laying out goals, specifying progress indicators, and planning data collections and summaries. The second part provides a template for developing a *New American Schools Reform Portfolio*. Overviews of both components are given next; these are followed in Chapters 3 through 6 by detailed discussions of their elements.

Assessing Progress

The first part of the workbook provides tools designed to help users examine school progress. The suggestions and worksheets prompt reformers to address all design elements and marshall multiple and varied data. They are meant to encourage reformers to collect a rich mix of qualitative and quantitative information. Because lags in implementation and outcomes are a central fact of school-wide reform, the framework also pushes users to set realistic benchmarks for change. These tools are designed to support the observations and recommendations offered by school reform portfolios.

This workbook walks reformers through three steps for charting progress. The first step asks reformers and school stakeholders to lay out statements of their reform goals and objectives. At step two for each objective, reformers are asked to specify indicators of school

change and effect. Additionally, the levels at which change is anticipated at important time intervals should be noted. Finally, step three calls on school-based reformers to describe the means by which data will be gathered; it discusses data collection, analysis and data reduction. Chapters 3 through 5 describe the three sets of activities.

Portraying Progress--Creating a School Reform Portfolio

The school reform portfolio provides a longitudinal record of progress in relation to reformers' benchmarks for progress; it describes the work of participants as reform progresses. On a continuing basis, it offers suggestions for realignment of upcoming goals and recommendations for future reform work. The portfolio template has five sections.

So that the portfolio will stand on its own, the first section describes the design and school's vision for reform. The second section discuses school and community characteristics; the third portrays implementation levels, early and later outcomes for major program elements. As conceived here, the third section follows an information pyramid format. The top level of the pyramid gives a short, directed portrayal of the most interesting information about implementation and outcomes. The second level gives a more extended, descriptive and qualified discussion of the data and their context. The bottom level includes case study information, narrative data, or sample materials to illustrate and make richer the information provided in the top level.

The data and observations provided by the information pyramids will drive participants' recommendations for future work. These, along with the summaries of reform progress and challenges, appear in the fourth section of the portfolio. The final section includes data displays to support information given in the body of the document.

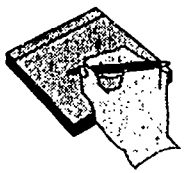
The five parts of the reform portfolios are discussed in Chapter 6 of this workbook. A sample portfolio, showing all five sections, appears in Appendix A. Readers may find it helpful to take an early look at the sample portfolio. The progress assessment framework and portfolio template are depicted at Figure 1.

FIGURE 1

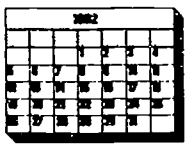
PROGRESS ASSESSMENT

ASSESSING PROGRESS

Specify Design Goals
& Reform Objectives



Lay Out Progress
Indicators
& Benchmarks



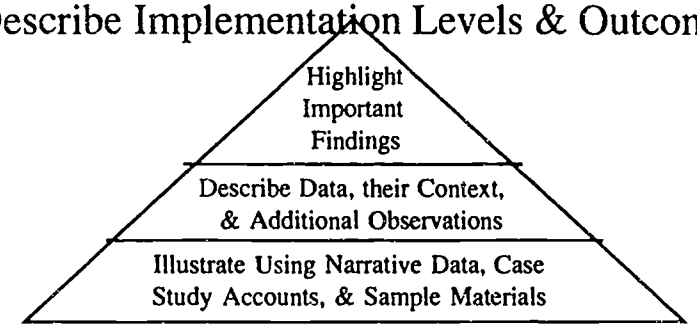
Gather & Analyze Data

PORTRAYING PROGRESS:
CREATING A SCHOOL REFORM PORTFOLIO

Describe School's Vision
& Reform Objectives

Depict Students, School
& Community

Describe Implementation Levels & Outcomes



Summarize Progress & Challenges,
Outline Recommendations for Future Work

3. ASSESSING PROGRESS--SPECIFYING REFORM GOALS AND OBJECTIVES

Progress assessment should begin with a mapping of the primary and secondary goals of the program. School-based reformers should specify goals in major program areas. The goal listing probably should include statements for nine design elements. These program elements describe the school as an organization and schooling as a process. They are largely evident in NASDC and other design-based reforms. The basis for discussion of the nine program elements and their definitions appear in Appendix B. The elements are:

- Standards and Assessment
- Curriculum and Instruction
- School Organization
- Teacher Professional Development
- Technology Use
- School Governance
- Family and Community Services
- Public Engagement
- School/System/Designer Partnering

Reformers also should state their comprehensive aims for schooling and school improvement. These goals cut across program areas and speak to school effectiveness generally. We will return to these shortly.

The design elements are illustrated by examples in this and the following chapters. Examples come from the NASDC designs and schools; the schools that are discussed are fictitious and based on composites of NASDC sites.

SAMPLE REFORM OBJECTIVES

Goal statements should reflect major program efforts. For example, *Expeditionary Learning/Outward Bound* designers describe the aims of teacher professional development in this way:

> In designing a professional development sequence, *Expeditionary Learning* recognizes that educators must be seen both and learners and professionals. As learners, they develop first-hand understanding of the design by participating in experiences which engage them in the kinds of hands-on learning they will create for their students. As professionals, they are responsible for the design of curriculum and assessment, and are supported by guiding facilitation, access to resources and information and active, collegial exchange of ideas across the *Expeditionary Learning* network.

To achieve these goals, reformers at the fictional George Washington New American School contend that certain program objectives are essential; they hold the following objectives for teacher professional development at their school:

- Ample time will be set aside for professional development and collaboration during the school year and in the summer.
- Teachers new to *Expeditionary Learning* will attend short-term orientation experiences (community explorations, service retreats, or wilderness leadership expeditions) to immerse them in the design, allow them to reflect on its principles, and forge a strong sense of community and team.
- Teachers will attend summer planning institutes to enable collaborative planning of learning expeditions.
- Teachers will participate in professional development "summits" to strengthen knowledge of their craft and introduce new practices and subject matter.
- School visits will be supported so that teachers and administrators can exchange ideas and strategies with like-minded reformers from different parts of the country.

These statements set the stage for assessing progress in relation to the teacher professional development goals at the George Washington New American School.

Analogously, *Co-NECT* designers describe their vision for technology use in this way:

> The *Co-NECT* design provides a vision of a technological infrastructure featuring unimpeded access to video, computer and software tools for all members of the learning community, and a flexible communication network linking all computers in the school with each other, and with computers around the world.

At the fabled John Adams New American School, reformers set the following objectives:

- Students and teachers will help create a video culture by developing and delivering video and broadcast productions of their work and school events.
- Students and teachers will help create a computer culture by learning about and making frequent use of computer technology, as well as, word processing, spreadsheet, data base, and communication tools, including HyperStudio and Mosaic.
- Unimpeded access to computer technology will be promoted by the establishment and maintenance of low computer/student ratios.
- An Internet connection and local area network will be established and their capabilities utilized for communication, data access, and collaboration.
- Technology coordinators will support wide availability and widespread use of video equipment, computers and software tools.

These, like the teacher professional development objectives above, make concrete the school's vision for reform; they focus the progress assessment activities that follow. Reformers at these two schools would draft corresponding statements for the remaining program goals.

COMPREHENSIVE STUDENT PERFORMANCE AND SCHOOL IMPROVEMENT GOALS

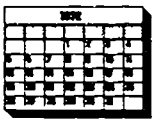
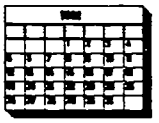
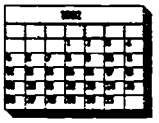
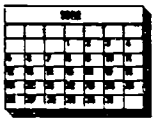
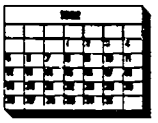
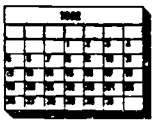
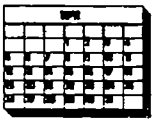
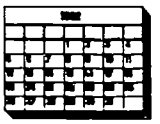
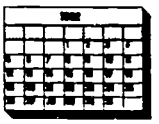
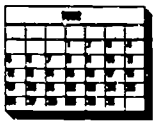
School reformers typically assess progress against a number of **comprehensive student performance and school improvement** objectives. Again, these cut across program areas (standards and assessment, curriculum and instruction, school organization, etc.) and speak to

school effectiveness generally. These are broad objectives for improving student performance and strengthening school programs. For example, most reformers strive to improve student attendance levels; reduce dropout rates; effect successful transitions to work, the military, and post-secondary education; and increase teacher attendance. Comprehensive objectives for students and the school should be specified in the same way that statements are laid out for individual program areas. Relevant data should be tracked at the outset and as the program matures. Lists of comprehensive student and program indicators appear in the next chapter.

Specification of goals and objectives is step one in the important process of establishing shared expectations for the program. This process should draw on the talents and views of school staff, parents, and other program stakeholders. Appendix C includes a worksheet that might be useful in specifying objectives. The objectives given above for the George Washington and John Adams New American Schools are examples of the types of statements that direct progress assessment. Steps for identifying relevant progress indicators, benchmarks, and data collection/analysis methods are described in Chapters 4 and 5. Figure 2 shows the three steps for assessing progress.

FIGURE 2

ASSESSING PROGRESS

Specify Design Goals & Objectives	Lay Out Progress Indicators & Benchmarks	Gather & Analyze Data
Standards & Assessment		
Curriculum & Instruction		
School Organization		
Teacher Professional Development		
Technology Use		
School Governance		
Family & Community Services		
Public Engagement		
School/System Designer Partnering		
Comprehensive Student Performance & School Improvement		

4. ASSESSING PROGRESS--SPECIFYING PROGRESS INDICATORS AND BENCHMARKS

SPECIFYING PROGRESS INDICATORS

Before considering progress indicators, it might be helpful to revisit the overarching questions posed by progress assessment. Again, these are:

- Are the design elements being implemented and are they observable in the school?
- Are participants (students, teachers, parents, administrators) making progress in relation to the program's goals?
- Which activities and strategies are aiding participants' progress toward reform goals?
- Which activities and strategies are impeding progress toward program goals?
- Are students and adult participants benefiting from program activities and strategies?
- What do progress levels (and aids and impediments) suggest about upcoming work and continuing program improvement?

In specifying indicators, school-based reformers should think about the kinds of data that signify progress for students and the school. Both indicators of implementation as well as distant, harder-won measures of progress and program outcomes should be specified.

As earlier stated, our ideas about progress assessment are inspired by the NASDC experience. If you have read about or worked on program evaluations, you will notice that the following discussion omits some analytic distinctions that typically are made. Traditional distinctions between formative and summative evaluation, indicators of program implementation and program impact, and direct and indirect indicators of school success are de-emphasized. The rigid demands of experimental design and quantification are relaxed and the range of telling information sources is expanded. We posit that the progress assessment

framework does not suffer from these slights and it will portray more faithfully the work of school-wide reform.

We will talk about three categories of indicators that seem to us well-suited to assessing the initiation, implementation and effects of whole-school designs. We call them **implementation observables, participants' judgments**, and **outcome indicators**. We believe they have utility for assessing progress and fostering program improvement for design-based reforms.

Implementation Observables

The first category of indicators includes data about things we call implementation observables. These literally are the observable manifestations of design components; they are things observers can see in the school building (mostly) that suggest the program is initiated and on its way. For example, for many NASDC designs, first-level evidence of implementation would be offered for differing design elements by the existence of:

- Site-based management committees
- Curriculum quality review teams
- Standards workshops
- Assessment inservices
- Technology planning teams
- Family services committees
- Community meetings

The existence of these groups and activities, in some cases, shows that participants are engaged in the hard work of reform. In others they are necessary, but not sufficient, precursors to the availability of pivotal program resources--like curriculum units, standards statements, or technology programs. Their "observability" does not support statements about the value of design efforts. As progress assessment proceeds, data should be gathered to support judgments of quality and effectiveness. Nonetheless, it is important to determine early on whether design components are, in fact, being implemented.

Implementation evidence is needed to gauge progress, frame program adjustments, and understand outcomes--or their absence.

To continue with this point, reform implementation likewise would be suggested by indications the school has in place important relevant components of the design, such as:

- Teacher team planning periods
- Revised student schedules
- Multi-age classrooms
- Classroom learning centers or project areas
- Student compact (individual education planning) systems
- Student portfolio programs
- Student exhibition centers
- Computer and technology centers
- Parent and community volunteer programs

Similarly, for designs relying on co-development of resources by school reformers and designers, evidence of implementation would be afforded by the availability of pertinent local products, such as:

- Standards statements
- Curriculum units and lesson plans
- Interdisciplinary or project-based instructional materials
- Design-related technology and supports

In many cases, statements about implementation observables can and should go beyond assertions of presence or absence; the data can show the levels at which indicators are present. For example, helpful information about the depth of implementation would be obtained by counting reformers' accomplishments: the numbers of completed curriculum units, or faculty completing professional development, or numbers of parents accessing family services, or community members volunteering, or businesses and nonprofits participating in the school program.

Returning to the *Expeditionary Learning* teacher professional development example for a moment, the following data about implementation observables would be informative:

- Amount of time devoted to professional development during the year (with indicators of spacing over the year)
- Amount of time set aside for teacher collaboration during the year (with indicators of spacing over the year)
- Number of days devoted to professional development during the summer
- Number of teachers participating (and electing not to) in community explorations, service retreats, and wilderness expeditions, summer institutes, "summits", and school visits
- Number of learning expeditions developed at the institutes

As reform proceeds at the George Washington New American School, it would be important to learn whether these are associated with positive change for teachers and ultimately for the program. Questions about the program's results are questions about program outcomes--which are discussed later in this chapter. Because it mirrors the reform's necessary beginnings, the value of first-level information on implementation observables should not be underestimated.

Lists of implementation observables for the nine design elements are given in the Table 1. These may help stimulate users' thinking about meaningful indicators of program initiation and implementation.

Table 1

Implementation Observables

Standards and Assessment

- Standards statements
- Schedule of training and materials given to teachers to help them understand new standards
- List of names of members of local standards committees and example minutes of meetings
- Copies of materials given to students, parents, and/or community members explaining new standards
- Available documentation on the links between standards and curriculum, and standards and assessments
- Schedule of training and materials given to teachers to do portfolio assessments and other new assessments
- Samples of portfolios assessments
- Samples of alternative assessment tasks not part of portfolios
- Statements of examples of scoring criteria for portfolios and non-portfolio assessments
- Documentation of changes in student achievement
- Documentation on the links between curriculum and assessments

Curriculum and Instruction

- Examples of lesson plans, units of study, etc.
- Number of lesson plans or units of study developed versus number remaining to be completed to cover full curriculum by grade level
- Sequence across grades of new curriculum (schedule for a student)
- Other changes to courses, course content, and course sequencing
- Documentation of connections to community in curriculum areas
- Description of quality control mechanisms in place for newly developed curriculum. For example, teacher peer review, review by design team, etc. And, evidence of subsequent changes or dropped units (for example, five units dropped after peer review)
- Schedule of training and materials for teachers for new curriculum
- Schedule for completion of all required curriculum units
- Schedule for adoption of instructional strategies
- Schedule and materials provided teachers for new instructional strategies
- List of places teachers use for community as classroom
- List of when the community has come into the classroom - speakers, performers

- Example of schedule that allows for students' individual choices

School Organization
- Teachers' school day schedule demonstrating time for teaming, curriculum writing, paperwork, etc.
- Documentation of new/changed staffing patterns including master teachers, apprentices, aides, volunteers, facilitators
- List of new grade combinations, teacher team combinations, etc., and when they went into effect
- Relative number of classes covered by these new combinations versus classes that have not converted
- Description of student placement procedures

Teacher Professional Development
- Schedule of teacher professional development meetings
- Workshop materials
- Workshop attendees roster
- School visit agendas
- Documentation of ongoing teacher collaboration

Technology Use
- List and location of newly purchased, design related equipment (classroom, labs, principal's office)
- Schedule for purchasing more design related equipment
- Schedule and materials for training
- List of software programs/packages used
- Examples of curriculum units incorporating technology

School Governance
- List of names of members of various committees required by design
- Schedule and materials for training in new governance roles
- Schedule of committee meetings and examples of minutes from meetings
- Significant products of the committees, such as new schedules for courses, standards for exemplary student products, new standards, plans for technology, school improvement plans
- Newly developed rules, regulations, master contracts, site-based management plans, waivers, and district-school agreements about school level control over budget, hiring, firing, evaluation, or mission
- List of incentives to encourage new behaviors
- Master contract changes to accommodate these roles
- Grievances filed concerning new roles
- Hiring/layoffs due to design implementation
- Description of new roles for administrators

Family and Community Services
- Name of social services coordinator for school

- Schedule for different activities
- Indicators of utilization of or participation in these services

Public Engagement
- Schedule of public meetings
- Materials explaining reform program for parent and community audiences
- Materials explaining reform for education stakeholder audiences
- Samples of newspaper articles and newsletters for lay consumption
- Community volunteer roster
- Business/nonprofit participation agreements

School/System/Design Partnering
- Statements of partnership objectives
- Schedules for and minutes from partner meetings
- Products jointly developed by partners

Participants' Judgments

Participants can provide invaluable information about implementation progress and perceived program benefits. Students', teachers', administrators', parents' and designers' judgments are important inputs for progress monitoring. While traditional program evaluation paradigms rate the information value of perception data lower than more direct data on implementation and outcomes, in school-based reform we posit their utility is high. The buy-in and sustained support of participants in school-based reform are likely (at least minimally) related to the quality of participants' efforts. In light of the sometimes struggling efforts of whole-school reformers, we believe that it is important to solicit and collect good data on participants' perceptions. Minimally, they suggest needed program refinements; they additionally provide second-level estimates of program effects.

Student and adult participants can offer useful perspectives on:

- Design clarity
- Implementation feasibility
- Resource availability (to support and sustain implementation)

- Levels of implementation and observability
- Quality of program guidance, resources and activities
- Satisfaction with student progress
- Presence of early (then ongoing) program benefits to students and other participants

For various of the design elements, for example, participants might be asked to speak to:

- The quality, comprehensiveness, and appeal of the curriculum
- Their satisfaction with associated instructional strategies
- Perceived levels of student engagement in the program
- The degree to which students seem to be learning better in response to program
- The degree to which teachers seem to be teaching better in response to program
- The value of information offered by performance assessments
- Their satisfaction with the changed roles of teachers
- The quality of products issued by management or topical committees (e.g. on standards, curriculum, technology, etc.)
- The perceived usefulness of technology to students, teachers, and program managers
- Their satisfaction with design-specified student groupings (multi-age, multi-year, reduced pull-out, individualized instruction, etc.)

These data would provide important direction for program efforts. For several of these areas (e.g. student engagement and achievement levels), more direct assessment also is possible and should be pursued.

Again, using the George Washington New American School teacher professional development example to illustrate, teachers might be asked for their perspectives on:

- The quality of professional development materials and experiences

- Their level of understanding of the design and its principals
- Their facility with strategies presented by the workshops
- The usefulness of new practices and subject matter presented at workshops
- The benefits of teamwork and ongoing teacher collaboration
- Suggestions for neglected professional development topics and areas for future improvement

Administrators' judgments on these matters also would be informative. Data on participants' perceptions could be collected in numerous ways (surveys, progress rubrics, interviews, focus groups, logs); data collection and analysis methods are discussed in the next chapter.

Outcome Indicators

Like economic indicators, reform indicators speak to the health or quality or effectiveness of the system. They have meaning when they are compared to something; reform outcomes can be compared to themselves over time and/or to agreed-upon standards for success. They correspond more closely to conventional notions of accountability than the types of evidence described to this point. Reformers might look for the impact of their work, for example, in increased student engagement, parental involvement, and teacher retention (in the program). They might realize growing community support or business participation. They might look for increased numbers of students meeting high standards on state performance assessments and for fewer students in the lowest score categories. Reformers might look for declines in disciplinary referrals and special education placements.

Examples of outcome indicators for different program elements, include those addressing the:

- Levels of student engagement in the program
- Degree to which students are learning better in the program (as measured by performance assessments, portfolios, projects or demonstrations)

- Degree to which teachers are teaching better in response to program (as measured by 'good practices' indicators like the use of cooperative learning or writing-across-the-curriculum strategies)
- Durability of changed rules, regulations, and contracts
- Effectiveness of instructional, social, and health services for families
- Involvement of program constituents in public engagement efforts
- Results of ongoing attempts to keep and build support

Unquestionably, some program outcomes are more easily and directly measured than others. As an example, direct measures of student engagement can be made by trained observers recording student time on-task and off-task over a number of occasions. This type of data collection is time- and labor-intensive. Alternatively, an indirect measure of engagement might be afforded by student attendance levels, homework completion rates, or rates of participation in school clubs. These indicators would serve as proxies for more direct indicators of student engagement. Though they are not ideal indicators of engagement, they provide reasonable information given the time, cost and expertise needed to index them.

Turning for a moment to student performance measures, it is important to recognize that they must be aligned with design goals if they are to speak clearly to reform progress. Student achievement data should come from assessments that focus on the student competencies addressed by the reform. In the context of today's reforms, students' accomplishments likely are best described by performance assessments (also called authentic assessments and constructed response tests), portfolios, learning records, and exhibitions.

Several states have developmental or operational performance assessment programs in place. Many of the NASDC designs also have student performance assessment systems associated with them. These are designed to represent the complex, important skills the designs seek to promote. A good deal of research on performance-based assessment lies

ahead for the measurement community, but educators and reformers are enthusiastic about the prospects presented by these assessments. The display and interpretation of performance assessment data are discussed in the next chapter.

It is important to say that--as part of the progress assessment--data also should be compiled on norm- or criterion-referenced tests. Standardized test data offer helpful contextual (supporting) information about student populations. It is not expected that these data will provide information about intended student or program outcomes. Many argue that standardized tests examine only a narrow slice of the curriculum, emphasize basic skills at the expense of higher-order reasoning, and ignore other important aspects of academic performance. Traditional assessments, indeed, may provide a discouraging view of reform progress; standardized test data may not improve as reform proceeds. They may even decline.

On this point, the introduction to this manual asserts that reformers should try to check stakeholders' attempts to hold up standardized test data as hallmarks of program success or failure. Administration of assessment instruments better aligned with program efforts should help in this regard, as should the reporting of multiple and varied progress indicators. That said, however, standardized test summaries are apt to be requested by certain stakeholder audiences because they are both familiar and easily understood. Ignoring them as contextual information in progress assessment probably would be more troublesome than helpful.

Comprehensive Student and Program Outcomes

As earlier suggested, some important and telling indicators of reform success will be reflected in broad school outcomes--like promotion and graduation rates; successful transitions to work, the military or post-secondary education; and teacher retention levels--for students and others. A number of commonly cited comprehensive outcome indicators are listed in Table 2.

As earlier noted, reformers should catalogue comprehensive measures of student and program performance right from the outset. Early and

ongoing data collections will allow participants and observers to track change over time. In fact, where feasible, the status of key indicators prior to design implementation should be recorded; pre-implementation data will serve as an invaluable baseline for assessing progress. Data such as the following are likely to be of interest:

Table 2

Comprehensive Student and Program Outcomes

Student Performance Indicators

- Attendance rates
- Homework completion rates
- Special education referrals and placements
- Promotion rates
- Graduation rates
- Rates of disciplinary referral, suspension and expulsion
- Drop-out rates
- Tardiness levels
- Numbers of students with one or more failing grades
- Numbers of students performing at or above grade level in language arts and/or math
- High school course loads
- Numbers of students taking the SAT or ACT Assessment
- Numbers of scholarships/honors awarded to seniors and other students
- Rates of participation in school activities/organizations
- Technical school enrollment or entry into military service
- College placement rates, major selection and non-remedial college course enrollment
- Technical school and college advanced course completion rates
- Technical school and college program completion rates
- Entry-level job placement and job performance levels

Program Outcome Indicators

- Instructional staff absence rates
- Retention of teachers in the school/program
- Numbers of applicants for open teaching positions
- Average teaching experience and degree status of newly-hired teachers
- Parent/teacher conference participation rates
- PTA and other parent meeting participation rates

- Parent volunteer rates
- Campus substance abuse, violence, and criminal activity rates
- Numbers and outcomes of fundraising efforts by parents and community members

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A worksheet for recording comprehensive program data appears at Appendix D.

SPECIFYING PROGRESS BENCHMARKS

For each indicator of interest, benchmarks (hoped-for accomplishments or milestones) should be specified for key points in the program's life; that is, reformers should record what they will strive for and reasonably can expect by way of implementation progress. For example, benchmarks for the numbers of expected curriculum units developed, teachers asserting they fully understand the design, and students scoring at proficient levels on performance assessments should be laid out.

Program stakeholders with different interests and prior beliefs should be called upon to help map benchmarks; alternately, they can be asked to review benchmarks before final adoption. The conversations that are key to forecasting accomplishments help promote shared expectations for progress. Making aims concrete for different program areas and time-frames gives stakeholders a chance to weigh in on the workplan for school transformation. It provides participants with an opportunity to share their views and hear the perspectives of others. Specification of benchmarks over time provides foreknowledge of the pace at which reform is expected to progress.

The benchmarks would serve as progress standards for the school. Participants might indicate what they hope to see at the end of each of the first and second years; they also might note sought-after progress and outcomes by the end of year four. Having just discussed comprehensive student outcomes, an example appears at Table 3 for a school seeking to increase students' academic motivation levels.

Table 3

Progress Indicators/Benchmarks

Comprehensive Student Performance and School Improvement Goals	Indicators	Spring 1996 Benchmarks	Spring 1997 Benchmarks	Spring 1999 Benchmarks
Objective 25: Increase students' academic motivation	Attendance rates	85%	87%	90%
	Disciplinary referral rates	10%	8%	5%
	% of students with ≥1 failing grade	19%	17%	14%
	Drop-out rates	8%	7%	5%

An indicator worksheet appears in Appendix F. For each program objective, it asks reformers to specify progress indictors and progress benchmarks. Examples of indicators were given in this chapter for the George Washington New American School; implementation observables, participants' judgments, and outcome indicators (including comprehensive student and program outcome indicators) should be specified. As illustrated by Table 3, indicators and benchmarks should be recorded for important time intervals.

5. ASSESSING PROGRESS--DATA COLLECTION AND ANALYSIS

DEVELOPING DATA COLLECTION PLANS

The last step in initiating a progress assessment is deciding upon data collection methods, data sources, timelines and data analysis approaches. The assessment probably will rely on a mix of information-gathering methods, including both qualitative and quantitative approaches.

Data Collection Methods

The following data collection approaches may yield meaningful and useful data:

- Observables inventories
- Classroom observation checklists
- Surveys
- Interviews
- Focus groups
- Document reviews
- Audio or video record reviews
- Student assessments (authentic and/or traditional)
- Student portfolios or learning records
- Student projects or demonstrations
- Teacher logs or portfolios
- Progress rubrics

These should be devised to gather information on the progress indicators you have specified. A data collection planning worksheet appears at Appendix F. Though description of the strengths and limitations of these data collection approaches is beyond the scope of this workbook, the methods are described briefly to help readers locate additional relevant information. Good discussions appear elsewhere; several are referenced at the end of this document.

Observables inventories and classroom observation checklists can be used to guide and record observations of classrooms and schools. The former are helpful in inventorying documentation, products, and other resources that are concrete manifestations of program elements. The latter are constructed to yield data about what is happening in the school and program (rather than what people believe and say is occurring). Typically conducted by trained observers, observations can provide information about the types of actions or behaviors the reform promotes. Observational data can be invaluable in making sense of other program data and in devising recommendations for program improvement. These methods are labor- and resource-intensive because they require substantial amounts of training and observation time; an additional disadvantage is that participants' behaviors may change when and because they are observed.

Surveys, interviews and focus groups are useful for obtaining information about the attitudes and opinions of participants and program stakeholders; they also can be developed to collect descriptive information about the respondents' characteristics. Surveys can cover a broad range of topics, be administered to a substantial number of individuals, and are relatively inexpensive. Interviews are better suited to more complex questions and open-ended responses; they can provide richer, more interesting data. Their disadvantage is that they take longer and are more difficult to analyze. As an information-gathering technique, focus groups bring together individuals to discuss topics salient to the progress assessment. The moderator must be skilled at leading discussion groups; this is an inexpensive and quick information gathering tool. All three methods may yield data colored by participants' need to provide socially desirable responses.

Reviews of existing documents, audio, and video records sometimes can provide good information about the comprehensiveness, depth, and quality of program resources and activities. Existing records may provide good illustrations of data gathered using other means. They also can point up underdeveloped areas.

Progress rubrics can be designed for use in summarizing reform accomplishments in given program areas. Rating forms can speak to

progress seen by way of observation, survey data collection, document review and other methods The scales can include categories anchored by descriptions of plausible progress levels. For reformers developing curricula, for example, a rubric might be devised to index progress in curriculum development and documentation. The strong rating category might say the curriculum is largely developed and documented. The good case might say that development is well on its way and much is documented, and the limited case might say that curriculum is evolving and much remains to be documented.

Student performance indicators--including traditional student assessments, performance assessments, student portfolios, learning records, projects and demonstrations--are key data collection instruments in progress assessment. These were briefly discussed in Chapter 4. Suggestions for analyzing performance assessment data are given below. Teacher portfolios and logs are analogs to student work collections and journals (or logs). They provide a means of examining teacher products over time, including instructional units, student assessments, committee documents, and other program contributions.

Example instruments from various NASDC designs are included in the appendix to this workbook. Future printings of this manual will include additional and updated data collection forms from NASDC teams and schools. An example observables checklist, classroom observation guide, interview schedule, and progress rubric appear in Appendices G through K. Sample teacher, administrator, and student surveys also are included. NASDC hopes to soon develop reform progress surveys for teachers, administrators and parents; these will speak generally to the goals and activities of school reform. Student assessments of different types already may be in use in your building, district or state. Many NASDC designs have performance assessments associated with them. Some additionally offer frameworks for teacher logs or portfolios.

Data Sources and Timelines

Sources of data about implementation levels and outcomes include students, teachers, administrators, parents, community members, and designers. Program records--including committee minutes, program logs

or products, workshop materials, and student and personnel files--are important information resources, as are existing external information sources, such as school and system-level records and databases. In addition to data collection methods and sources, the planning worksheet at Appendix F asks for the time-frames within which data will be obtained.

Data Analysis Methods

As was the case for data collection approaches, careful descriptions of analytic techniques are beyond the scope of this guide. Good treatments of methods likely to be useful in progress assessment are listed in the bibliography. Only a cursory discussion appears here; its intent is to give the reader enough information to find appropriate references.

Very many of the data generated by progress assessment can be presented meaningfully as counts or percents. Data for implementation observables, for example, often are usefully provided as counts. Multi-categorical data can be summarized using frequency distributions and measures of central tendency. Score data from student performance assessments generally are multi-categorical. Performance assessment scores typically correspond to four or five proficiency levels. Score distributions showing the number and percent of students at each level gives readers information about typical student performance and the proportions scoring in the highest and lowest categories. Provision of a median (the point dividing the distribution in half) and mode (the most frequently occurring data category) additionally summarizes frequency data. Shifts in score distributions over time--showing fewer students at the lowest score categories and increases in average performance--are telling indicators of student progress.

In producing frequency displays for data with many categories, the analyst generally examines detailed distributions and summarizes it using tables or graphs. If the analyst wants to describe the data using a single figure, an arithmetic mean (average), median or mode can be used; the range (lowest and Highest points) and an indication of variability also is helpful.

In some cases, researchers would want to subset the data and describe them separately for varied types of respondents (e.g. teachers, parents, and administrators; or new teachers and veteran teachers). Cross tabulations of the data provide the needed information. Approaches to testing the statistical significance of group differences rely on t-tests, chi-square and variance analyses. The strength of the relationship between two variables can be described using correlation coefficients.

No matter which analytic tools are employed, the final step is to author texts and develop tables and graphs to describe salient findings in terms that will resonate with stakeholders. The reform portfolio--next described--is intended to summarize the data gathered by progress assessment. By way of the portfolio, reformers will describe progress and challenges and make recommendations for upcoming work.

6. PORTRAYING PROGRESS--CREATING A SCHOOL REFORM PORTFOLIO

This workbook provides a template for developing a *New American Schools Reform Portfolio*. The reform portfolio is meant to provide a longitudinal record of school progress in relation to reform intents and design features. As described in earlier chapters, the assessment framework is designed to elicit varied and rich data about initial implementation levels, early outcomes, and--over time--later indicators of progress and program effects. The reform portfolio records things assessed, refined and learned. It highlights successful program elements and point out remaining challenges. The portfolio offers suggestions for upcoming work and fosters program improvement.

The reform portfolio additionally provides important and necessary accountability information for numerous stakeholder audiences, including state and local officials, parents, community members, funders, and fellow reformers. The reform portfolio helps establish the agenda for ongoing school improvement and promotes fuller and continuing understanding of reform progress for present and future transforming schools.

NEW AMERICAN SCHOOL REFORM PORTFOLIO TEMPLATE

The reform portfolio template has five sections; it includes:

- A statement of the school's vision and objectives for reform,
- A description of the student population, school and community,
- Descriptions of initial implementation levels, early outcomes, and--over time--later indicators of progress and program effects,
- A summary of reform progress and challenges, with recommendations for future reform work, and
- Appendices, providing data displays to support the body of the portfolio.

The parts are depicted in Figure 3 and described below. A sample portfolio appears at Appendix A.

The Design and Program Vision

The portfolio begins with a short portrayal of the design and the school's vision for reform. The direction of major program efforts is described, as are the student and program outcomes sought. This introductory section sets the stage for the data summaries to follow. An example summary for George Washington New American School *(Expeditionary Learning/Outward Bound)* appears in the appendix.

Most authors will elect to precede this introductory section with an Executive Summary, providing an encapsulated version of the program description, discussion of progress and challenges, and recommendations for future work.

Description of the School and Community

Section two provides a description of the school and its community. Discussion of district and school characteristics, family and student characteristics, school staffing and budget levels provides useful contextual information. Supporting data might appear in the appendix to the portfolio. A sample description for Thomas Jefferson New American School (a fictitious *Audrey Cohen* school), as well as, a summary of context data for the James Madison New American School--a *Community Learning Centers* school--given in the appendix. A worksheet for recording context information about students and the school appears at Appendix L.

Description of Implementation Levels and Outcomes

This section of the portfolio reports the most telling and important information about implementation levels and outcomes. Narrative and graphic progress summaries would appear for each major program area (curriculum and instruction, standards and assessment, school organization, teacher professional development, etc.). Additionally, available comprehensive student and program data are reported, including attendance, promotion, graduation, drop-out, college placement, parent and community involvement rates, and so on.

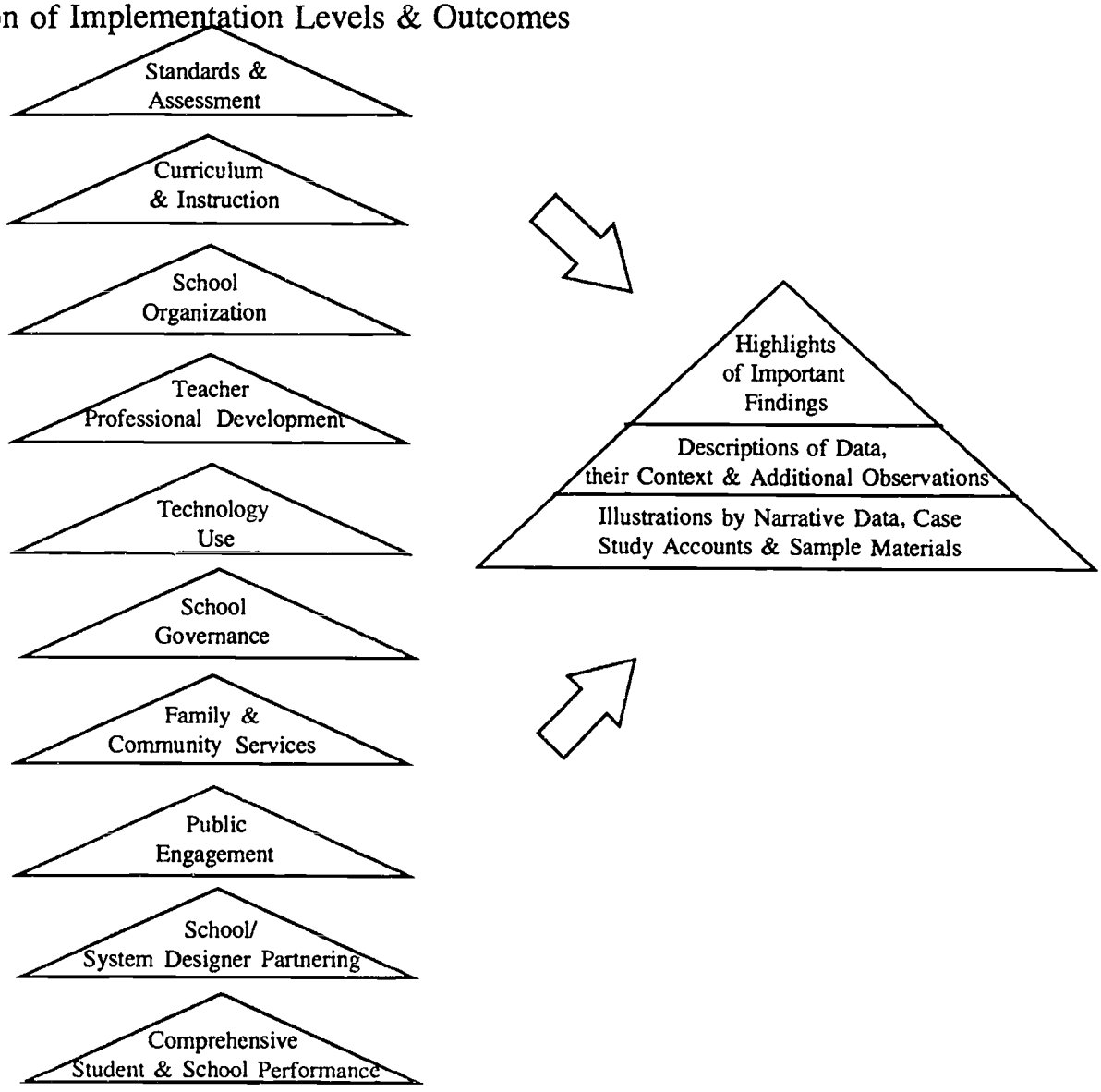
FIGURE 3

PORTRAYING PROGRESS:
CREATING A SCHOOL REFORM PORTFOLIO

Statement of School's Vision & Reform Objectives

Description of Students, School & Community

Description of Implementation Levels & Outcomes



Summary of Progress & Challenges, Outline of Recommendations for Future Work

For each major program area (and for the comprehensive program data), the information is organized as an information pyramid. Examples of information pyramids with three levels are provided in Appendix A for several of the design elements; they begin on page A. 13. The top level of the information pyramid is meant to give a short, directed portrayal of the most interesting information about implementation and outcomes. Results might be presented in bulleted format to make easier the reader's review of findings and progress. Note for the appendix examples that program goals are recounted in side-boxes to highlight the relevance of reported data.

The second level gives a more extended, descriptive and qualified discussion of the data and their context. Easy-to-read tables and graphs might appear in the second level. The third level includes case study reports, narrative data, or sample materials to illustrate and maker richer the information provided in the top level.

The materials in the appendix draw on qualitative and quantitative data collected by *Expeditionary Learning/Outward Bound, Roots and Wings, Co-NECT, and Audrey Cohen* school reformers during the 1993/94 school year. Most are based on information composites from a number of schools; they serve only to illustrate the information pyramid format.

Summary of Progress, Challenges and Recommendations

The fourth part of the reform portfolio provides a summary of key program accomplishments and a discussion of remaining challenges. Where needed and in light of reformers' observations, suggestions are made for realignment of plans and program goals. An example progress summary for George Washington New American School appears in the appendix. Again, the final section of the portfolio is its appendix section which would include data summaries supporting information provided in the body of the portfolio.

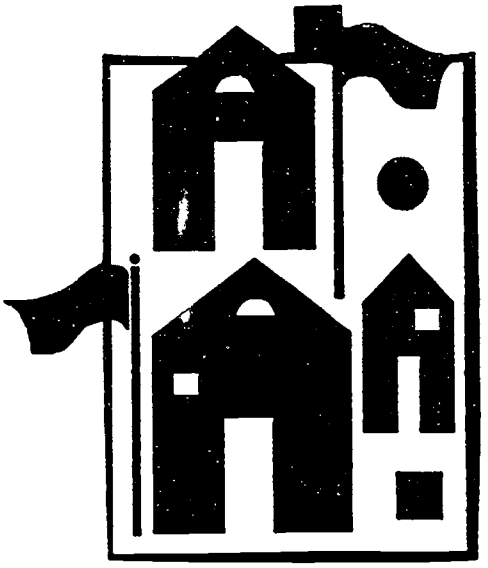
At each installment of the portfolio and as reform is informed by experience, more numerous and telling information about progress and program outcomes will be offered. The school reform portfolio is likely to promote fuller and continuing understanding of reform progress for present and future New American Schools.

ASSESSING AND PORTRAYING REFORM

This workbook was designed to help school-based reformers marry the work of reform with the analysis of change. It provides tools that NASDC and other design-based reformers can use in assessing and portraying school transformation. This manual lays out and describes an assessment framework called progress assessment. The framework directs reformers to involve participants and stakeholders in specifying program goals, change indicators, and data collection/summary plans. It calls for establishment of early and ongoing systems for progress monitoring. The workbook provides a template, described in this last chapter, for a *New American Schools Reform Portfolio*. As earlier suggested, the New American Schools Reform Portfolio likely will serve numerous audiences and address varied objectives. The portfolio provides a vehicle for deliberation about school reform; it provides an ongoing record of reform activity, recommendations for program improvement, and an agenda for future work. The portfolio also will provide important accountability information to program stakeholders. Fellow reformers and the education community will look to the portfolio for contributions to the evolving knowledge base about school-wide reform. We assert that progress assessment and the resulting portfolio will further the success of reforming schools.

A. George Washington New American School Reform Portfolio

GEORGE WASHINGTON NEW AMERICAN SCHOOL REFORM PORTFOLIO



GEORGE WASHINGTON
NEW AMERICAN SCHOOL REFORM PORTFOLIO
FALL 1993-SPRING 1994*

Table of Contents

***This reform portfolio reflects the observations of George Washington New American School reformers; it describes program implementation levels and outcomes during the period from fall 1993 through spring 1994. This reform portfolio periodically will be updated to provide a longitudinal account of school progress in relation to design goals and features. Please call or write XXX to inquire about future reports.**

INTRODUCTION TO THE DESIGN AND MAJOR REFORM GOALS

George Washington New American School

George Washington New American School chose to become a center of Expeditionary Learning in 1993. Expeditionary Learning is a comprehensive school design based upon ten design principles which grow in large part out of the experience and philosophy of Outward Bound. Outward Bound, founded by Kurt Hahn in 1941 and brought to this country by Joshua Miner and Charles Froelicher in 1962, has at its core the belief in the value of transformative experiences of physical challenge and service, especially when supported by the creativity and teamwork of small working groups. Such experiences offer a powerful antidote to the apathy and alienation which plagues many schools, particularly when they are designed to help students meet high standards for academic performance.

Using Expeditionary Learning design principles we hope to transform every aspect of our school. The design calls for the complete reorganization of time, space, and relationships in order to allow teaching and learning to take the form of intellectual and physical expeditions. The change required is complex, involving profound changes in school culture, and the ten design principles provide vision and direction. They require building greater continuity of relationships between students and teachers, drawing on the power of small groups, creating curriculum that is more focused and in-depth, and building stronger links between our school and community. A description of the Expeditionary Learning design principles and program components follows.

Expeditionary Learning Design Principles

Learning is an expedition into the unknown. Expeditions draw together personal experience and intellectual growth to promote self-discovery and construct knowledge. We believe that adults should guide students along this journey with care, compassion, and respect for their diverse learning styles, backgrounds, and needs. Addressing individual differences profoundly increases the potential for learning and creativity of each student.

Given fundamental levels of health, safety and love, all people can and want to learn. We believe Expeditionary Learning harnesses the natural passion to learn and is a powerful method for developing the curiosity, skills, knowledge and courage needed to imagine a better world and work toward realizing it.

1. *The Primacy of Self-Discovery.* Learning happens best with emotion, challenge and the requisite support. People discover their abilities, values, "grand passions," and responsibilities in situations that offer adventure and the unexpected. They must have tasks that require perseverance, fitness, craftsmanship, imagination, self-discipline and significant achievement. A primary job of the educator is to help students overcome their fear and discover they have more in them than they think.

2. *The Having of Wonderful Ideas.* Teach so as to build on children's curiosity about the world by creating learning situations that provide matter to think about, time to experiment, and time to make sense of what is observed. Foster a community where students' and adults' ideas are respected.

3. *The Responsibility for Learning.* Learning is both a personal, individually specific process of discovery and a social activity. Each of us learns within and for ourselves and as a part of a group. Every aspect of a school must encourage children, young people, and adults to become increasingly responsible for directing their own personal and collective learning.

4. *Intimacy and Caring.* Learning is fostered best in small groups where there is trust, sustained caring and mutual respect among all members of the learning community. Keep schools and learning groups small. Be sure there is a caring adult looking after the progress of each child. Arrange for the older students to mentor the younger ones.

5. *Success and Failure.* All students must be assured a fair measure of success in learning in order to nurture the confidence and capacity to take risks and rise to increasingly difficult challenges. But it is also important to experience failure, to overcome negative inclinations to prevail against adversity and to learn to turn disabilities into opportunities.

6. *Collaboration and Competition.* Teach so as to join individual and group development so that the value of friendship, trust, and group endeavor is made manifest. Encourage students to compete, not against each other, but with their own personal best and with rigorous standards of excellence.

7. *Diversity and Inclusivity.* Diversity and inclusivity in all groups dramatically increases richness of ideas, creative power problem-solving ability, and acceptance of others. Encourage students to investigate, value and draw upon their own different histories, talents and resources together with those of other communities and cultures. Keep the schools and learning groups heterogeneous.

8. *The Natural World.* A direct and respectful relationship with the natural world refreshes the human spirit and reveals the important lessons of recurring cycles and cause and effect. Students learn to become stewards of the earth and of the generations to come.

9. *Solitude and Reflection.* Solitude, reflection, and silence replenish our energies and open our minds. Be sure students have time alone to explore their own thoughts, make their own connections and create their own ideas. The give them opportunity to exchange their reflections with each other and with adults.

10. *Service and Compassion.* We are crew, not passengers, and are strengthened by acts of consequential service to others. One of a school's primary functions is to prepare its students with the attitudes and skills to learn from and be of service to others.

Program Components

1. *Schedule, Structure, Teacher-Student Relationships.* Expeditionary Learning requires a complete reconsideration of the relationships among staff and students, as well as the schools' arrangements of time and space. Schools must eliminate the fifty minute period and replace it with a schedule organized to accommodate learning expeditions that may engage students full-time for periods of days, weeks, or months. Tracking is eliminated. Teachers teach the same group of students for at least two years, and preferably longer.

2. *Curriculum.* Expeditionary Learning engages the learner in situations that provide not only context but consequence. Learning expeditions which often encompass several disciplines replace subject-separated classes. The curriculum makes intellectual learning and character development of equal importance and encourages self-discovery.

3. *Standards and Assessment.* Expeditionary Learning uses real-world performance as the primary way to assess student progress and achievement. Assessment reflects world-class student performance standards, as well as world-class standards for curriculum, instruction, and opportunities to learn. Portfolios are a primary vehicle for this assessment.

4. *Staff Development.* Expeditionary Learning depends upon and invests in the ongoing development and renewal of staff. Flexibility in hiring or reassignment, and a substantial investment in year round staff growth is required.

5. *Linkages to Community and Health Service Organizations.* To provide necessary support to students and their families, working relations with the appropriate service agencies will be developed.

Conclusion

George Washington New American School and Expeditionary Learning place the development of intellect and character together at the pinnacle of educational goals. Our program emphasizes the critical roles that teachers play a curriculum designers, instructional guides, and facilitators whose assessment practices enable both students and teachers to learn and grow. Teachers and students alike continually work on investigating, explaining and questioning; on being respectful and responsible; on exercising good judgment; and on making thoughtful choices and wise decisions. We hope in the coming three years to transform our school into a true center of Expeditionary Learning.

DESCRIPTION OF THOMAS JEFFERSON NEW AMERICAN SCHOOL

Thomas Jefferson New American School serves the public elementary school population for the Independence School district in Presidents County, Pennsylvania. The school is located in one of the poorest communities in the United States and serves approximately 873 students in kindergarten through sixth grade. There are between four and five teachers per grade. In the 1993-94 school year, the school population consisted of 108 to 163 students per grade. Although it is rich in cultural and social resources the school is limited in economic resources. Led by its dynamic superintendent, who has committed most of his professional life to helping his community, Thomas Jefferson New American School is an integral part of an economic development strategy which attempts to establish many small businesses in Independence, which will employ graduates of the elementary and secondary schools, thus keeping students in the community and contributing to its growth. Although Thomas Jefferson New American School exists virtually surrounded by cotton fields and catfish ponds, the school supported by the Purpose-Centered System of Education, encourages children to use regional resources for the completion of their Constructive Actions©. Partnerships with institutions in the region have been established. Traditionally, this has been the area of the state with the lowest scores on student achievement outcomes (i.e. Stanford Early School Achievement Tests) used by the State Department of Education for the assignment of accreditation levels. For the school district, about 98% of the 1,417 students are African-American and 98% of the students receive free or reduced fee lunches.

Adapted from Audrey Cohen Year 1 Phase 2 Report, January 1995.

STANDARDS AND ASSESSMENT

Implementation Levels and Outcomes

* Substantially more James Monroe New American School third graders scored at or above satisfactory on the 1994 MSPAP language, mathematics, and science sections than did third graders in 1993.

* Significant gains also were seen in fifth grade reading, language, mathematics, science and social studies performance.

One of Roots & Wings' partners, the MD State Department of Education, is a leader in defining student performance standards and devising assessments. The MD School Performance Assessment Program (MSPAP) measures complex problem solving, critical and creative thinking skills using rigorous, realistic, often multi-disciplinary, tasks.

* Writing performance for grade three in 1994 did not improve in relation to 1993. For fifth graders performance declined.

STANDARDS AND ASSESSMENT

Research and Additional Observations

MSPAP provides proficiency scores in subject areas linked to descriptions of what students know and can do in relation to the Maryland learning outcomes. MSPAP proficiency level cut scores were established by content area committees of classroom teachers, principals, local school system content specialists, Maryland college and university professors, and local school board members. An articulation study of the Roots & Wings curriculum and MSPAP objectives is now being completed.

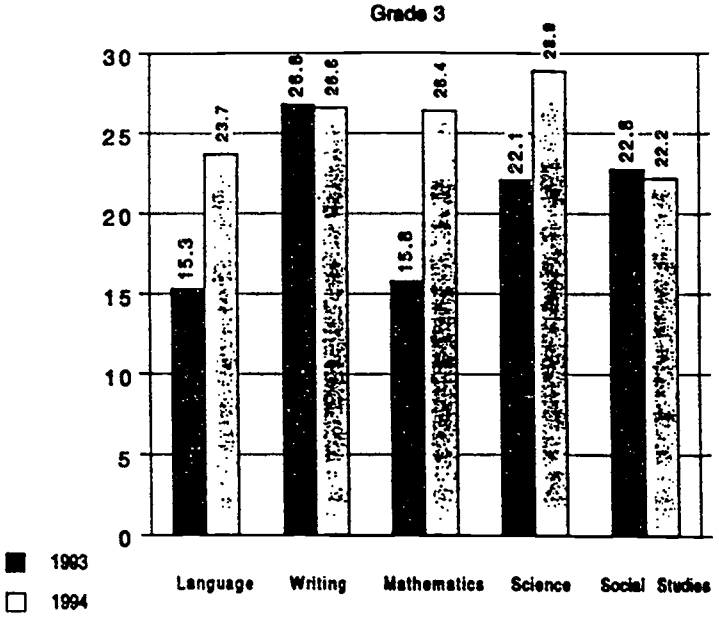
The gains described above (and shown below) were seen despite only partial implementation of most program elements at James Monroe New American School in 1993/94. We expect much greater gains in 1994/95 as we approach full implementation. The 1994 outcomes were not fully consistent across measures. Writing scores were disappointing; we have had trouble scheduling enough time for instruction in writing, and the sobering results on this measure have helped us see the need to redouble their efforts in this direction.

In addition to MSPAP student assessment, teachers collected samples of student work from language arts, mathematics, and WorldLab over the course of the year. These are used along with curriculum-specific assessments to evaluate growth. This first look at our students' performance via MSPAP, portfolios and classroom assessments gives us confidence; we believe we are on the right track and are making a difference with the children in our school.

Adapted from Roots & Wings Fifth Quarterly Report, Phase 11, January 1995.

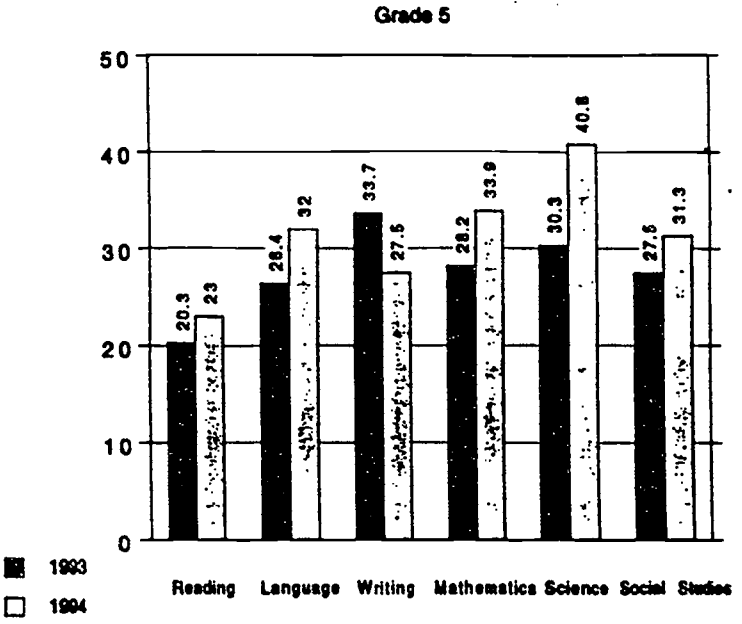
Maryland School Performance Assessment Program
Percent of Students in Roots and Wings Schools
Scoring At or Above "Satisfactory" in 1993-1994

Grade 3



Maryland School Performance Assessment Program
Percent of Students in Roots and Wings Schools
Scoring At or Above "Satisfactory" in 1993-1994

Grade 5



STANDARDS AND ASSESSMENT

Sample MSPAP Task and Scoring Rubric

S C O R I N G S O C I A L S T U D I E S

As part of an integrated social studies/science task, third grade students considered the economic impact of the Chesapeake Bay on the lives of some fictional Marylanders.

Based on the information you read and what you know about wants, needs, and resources, what need could both families satisfy by using the Bay's resources? Explain your answer.

Outcomes Measured
Economics (Outcome 4) and Skills and Processes (Outcome 5)

Scoring Tool
This response gives evidence of understanding of economic needs.

2 points

- ☐ This response gives considerable evidence by identifying a basic need satisfied by the Bay. The response is supported by references to both families and to the specific need the Bay satisfies.

1 point

- ☐ This response gives adequate evidence by identifying a basic need satisfied by the Bay. The response is supported by references to one family and to the specific need the Bay satisfies for that family.

0 points

- ☐ Other

Answer Cue

- — food (fish, crabs, oysters)
- — work (making a living)
- — recreation

Sample Student Responses

2 POINTS:

They both need their water to leve one family needs the water for the fish and one needs the Bay to have fun you can use the Bay for recreation to

1 POINT:

Pat's fimly needs to fish and do other Jobs.

Lee's fimly go on trip to the bay.

0 POINTS:

Food because they said that they fish instead of going to Giant or something. They need that.

Which family do you think depends the most on the resources of the Chesapeake Bay? Give at least two reasons to support your answer.

Outcomes Measured
Economics (Outcome 4) and Skills and Processes (Outcome 5)

Scoring Tool
This response gives evidence of understanding of economic needs.

2 points

- ☐ This response identifies either Lee's or Pat's family as having greater need for the Bay and gives at least 2 valid, text-based reasons to support this position.

1 point

- ☐ This response identifies either Lee's or Pat's family as having greater need for the Bay and gives at least 1 valid, text-based reason to support this position.

0 points

- ☐ Other

Answer Cue

- — helps them earn a living by fishing
- — provides food
- — provides water
- — helps them earn money

Sample Student Responses

2 POINTS

Family Pats Family

1) They earn their living there to fishing

2) Pats Grandfather works with boats

1 POINT:

Family Pat's

2) Pat lives near the water they get food from fish.

0 POINTS:

Family Pat's

1) Because Pats and his family live in a small community near the

2) Chesapeak Bay.

How do you think Pat's family feels about the way Lee's family uses the resources of the Bay?

Outcome Measured
Valuing Self and Others (Outcome 6)

Scoring Tool

1 point

- ☐ The response provides evidence of the ability to consider the perspectives of others by identifying a feasible reaction that Pat's family might have to the way Lee's family uses the resources of the Bay.

0 points

- ☐ Other

Sample Student Responses

1 POINT:

I think they might be a little jealous that they can go water skiing.

0 POINTS:

I don't think Pats Family is happy about Lee's family at all

CURRICULUM AND INSTRUCTION

Implementation Levels and Outcomes

For Expeditionary Learning faculty, the expedition is a metaphor for learning and an approach to pedagogy that informs professional development and practice. They are comprised of projects that end in culminating expeditions of learning. Through expeditions, teachers become curriculum developers, make resources available and guide their use, help students formulate and answer questions, and assure students have the skills needed to tackle the challenging, multi-disciplinary issues they address.

* Ethnographers spent 5 weeks at George Washington New American School and found that expeditions were carried out in all classrooms and occupied at least 2 hours a day.

* Expeditions involved teachers teaming in their planning and to some extent in their implementation.

* They required schedule alteration; in most classrooms there were blocks of time devoted to expeditions.

* Expeditions addressed all six domains targeted as central to development of students' skills and knowledge; technology was used extensively and was well integrated.

* Teachers taught disciplines and skills to address expeditions' guiding questions rather than teaching them for their own sake; students were provided with multiple avenues to learning and exhibiting what they learned.

CURRICULUM AND INSTRUCTION

Research and Additional Observations

During 1993/94 ethnographers spent approximately 5 weeks in George Washington New American School. They devoted the first week to becoming familiar with the school and remaining weeks obtaining in-depth understanding of classrooms and the way in which expeditions were implemented. Ethnographers also selected six students for case study and shadowed them in classes, informally interviewed them and their teachers, and collected materials from their portfolios. Additionally, in fall 1993 and spring 1994 site visitors spent 2 days conducting formal and informal interviews with teachers, administrators, students and parents; observing classes and other activities; and learning from participants about implementation progress and discussing challenges.

In addition to observations described above, ethnographers and site visitors observed that there was an emphasis on group work and an attempt to make classes and groups inclusive. Learning occurred both in the classroom and outside it through bringing in experts and field trips. The classroom walls were permeable and field trips became an occasion for learning and carrying out projects. Character development was emphasized in all expeditions and was cited by many teachers as an important outcome of expeditions.

The expeditions differed greatly in the extent to which student interests or questions fueled the expedition. In some cases, a fairly tight teacher-directed curriculum was pursued; for other expeditions students had opportunities to debate the direction of the expedition

itself, the nature of their projects and how their group would carry them out.

Quiet individual reflection was scheduled during the day or week in some classrooms. In others, reflection was encouraged through student journals and discussions at the beginning and end of the day about the expedition or group process.

Adapted from EL/OB First Year Implementation Report, September 1994.

CURRICULUM AND INSTRUCTION

The Lessons of Learning Expeditions

by Leah Rugen and Scott Hartl

> I felt like a real scientist. When I looked into the microscope and found the specimen, it was awesome. When you are done with the expedition, you go home and tell your mom and dad what you learned, and they practically don't even know what you are talking about. Six weeks ago I would never have known about pond life.
>
> -a 5th grader's journal entry
> Dubuque, Iowa

Students in Expeditionary Learning schools spend most of their time engaged in sustained, in-depth studies of a single theme or topic. The experiences, which generally last four to nine weeks, include strong intellectual service, and physical dimensions. Intellectually rigorous projects and purposeful fieldwork- the heart of each expedition- provide a vision and a strategy for assessment that are fully integrated with curriculum and instruction.

A Spectrum of Possibilities

Within a range of elementary, middle, and secondary schools, in both urban area and small cities, teachers are testing the boundaries of what it means to launch learning expeditions. Some expeditions focus on two academic disciplines, while others integrate multiple disciplines such as math, science, humanities, and arts. Some are four to six weeks in length; others last three months. Expeditionary learning explicitly joins intellectual and character development. The organizing center of the expedition is an intriguing and open-ended theme or topic, which defines the territory but also generates questions. Themes or topics naturally cut across disciplines, though some, such as Pond Life and Urban Renewal, lend themselves more to one discipline than another. Guiding questions give learning expeditions a structure. For example, at the School for the Physical City, the question "How can we tell when a community is thriving?" gave focus to the theme Our City, Ourselves. Across all sites, as the initial learning expeditions unfold, teachers weigh which themes and questions work and which seem too broad or narrow. They consider the role of the student in developing guiding questions and in shaping the expedition plan. At Dubuque's Central Alternative High School, for example, teachers offer students academic credit for effective participation in planning meetings.

Sifting through the spectrum of possibilities for learning goals and developing a focused set of priorities are the toughest challenges of planning a learning expedition. At King Middle School in Portland,

Maine, teachers wanted to ensure that they could satisfy their major objectives for each discipline. The social studies teacher discovered she could address aspects of world culture, but not American history, which was the schooled focus of the following year's curriculum. Similarly, the science teacher needed to focus on biology, and the language arts teacher knew her students should focus on writing a major research paper and persuasive essays.

After a lively discussion of possible themes to address each of these needs, the teachers settled on Endangered Species. In their social studies work, students use a case study approach to examine the complex interactions between humans and the environment of endangered species in selected non-American cultures. Their science work focuses on ecological issues, and math includes the collection and presentation of data on endangered species.

The Journeys Take Shape

A learning expedition is shapeless until ideas for projects are developed. Projects unify and ignite student learning by calling for concrete products or actions that address authentic problems and situations. After the King Middle School teachers chose their theme, they brainstormed ideas for projects that would integrate the social studies and science content with writing. The projects they agreed on included a debate, a campaign to inform the school and community about endangered species issues, and an in-depth research paper on an endangered species encompassing several disciplines.

One of the tensions in developing projects is finding the balance between group and individual assignments. Individual work ensures student engagement and gives teachers the opportunity to assess the strengths and challenges of each student. Portfolios are a primary assessment vehicle. Within individual projects, however, students have opportunities to share skills and resources and critique one another's work.

Teachers also plan group projects with specific components that are clearly the responsibility of individual students. For example, in creating a field guide to a local pond, each 5th grader at the Table Mound School in Dubuque was responsible for his or her own page in the field guide. As students become accustomed to project work and develop strong work habits and high standards for their work, group projects grow stronger.

Preparation for the Expeditions

A driving question in the planning of learning expeditions has been how best to prepare students for sophisticated projects. Over time, students tackle an array of tasks and experiences that develop and stretch their background knowledge and skills. Teachers cultivate students' habits of work, thinking and judgment through the daily rituals of reading, writing, problem solving, and discussion. Most important, preparation for sophisticated work relies on the development of a strong school culture with a common vision and experience.

The use of fieldwork and service is perhaps the most radically different dimension of learning expeditions. A new set of school norms soon develops, as clipboards for field notes and journal entries join chalkboards and three-ring binders as essential school equipment.

Teachers discover the multiple purposes of field work- for immersion into a topic, deeper investigation and research, team-building, and adventure- as they find their way through barriers of tradition, planning, logistics and safety, and time. The passive model of field trips, in which students followed a guide through a museum or business, gives way to a more active approach. Students interview passers-by, sketch buildings, measure shadows, and make observations. They venture out to answer questions and follow leads that cannot be looked up in textbooks.

When fieldwork is joined with meaningful service, the consequences and purpose of learning are made even clearer to students. Middle school students at the Hernandez School in Boston, for example, surveyed community members to determine the best uses for several vacant lots near the school. After students presented their plans and scale models to parents and community members, a local environmental organization decided to use one of their proposals in developing one of the lots. Not only had their ideas been heard and respected, but the students had also made a needed contribution.

Like every other aspect of learning expeditions, however, purposeful fieldwork and service present a great challenge. They require flexible scheduling and rethinking the grouping of students and the roles of all school staff. Field experiences, though, need not be elaborate or long-distance endeavors. Students learn much, for example, by interviewing the owner of a local business or developing an ongoing relationship with staff or residents of a local nursing home. In addition, visitors from the community- experts, parents, and neighbors- bring the outside world into the classroom.

Kurt Hahn, the founder of Outward Bound, captures the spirit of our endeavor:

> I regard it as the foremost task of education to ensure the survival of these qualities: an enterprising curiosity, an indefatigable spirit, tenacity of pursuit, readiness for sensible self-denial, and above all, compassion.

TEACHER PROFESSIONAL DEVELOPMENT

Implementation Levels and Outcomes

* 78% of George Washington New American School teachers participated in 1993 summer institutes and/or mini-sabbaticals. 85% of participants said these activities better prepared them to collaboratively plan and write expeditions.

* Over 50% of teachers participated in orientation experiences. Participants said they now better understand the EL community's principles of intimacy and caring, responsibility for learning, collaboration and competition, and diversity and inclusivity.

* 78% of teachers participated in school-based planning meetings. Teachers described these as important vehicles for making school policy and keeping informed about other school teams' activities.

Expeditionary Learning recognizes that educators must be learners & professionals. As learners, they will better understand the design by participating in hands-on learning experiences like those they will create for students. As professionals, they will design curriculum and assessments--& be supported by guiding facilitation, access to resources and information, & active, collegial exchange of ideas.

TEACHER PROFESSIONAL DEVELOPMENT

Research and Additional Observations

Data on teachers' judgments of implementation levels and the benefits of professional development were gathered via surveys administered in spring 1993 and fall 1993. Teachers' views of EL/OB staff development activities were overwhelmingly positive. Teachers felt that they learned EL/OB principles and components during their staff development activities and gained new respect for their colleagues. A few said they had made some fairly dramatic shifts in their approach to teaching. This was especially evident in teachers' responses to the Outward Bound Wilderness Expeditions. A minority of teachers felt that too much time was spent on team building activities, that staff development was not sufficiently linked to their needs (practical applications, the urban classroom, and school planning). Suggestions for improving staff development included scheduling to accommodate teachers' needs; more hands-on work with follow-up in the classroom; more attention to administrative support for EL/OB teachers; and use of experienced teachers to facilitate workshops, including those in the EL/OB project.

Adapted from EL/OB Interim Report, February 1994.

TEACHER PROFESSIONAL DEVELOPMENT

Summer Summits and the Expeditionary Learning Process

In recent years, researchers and administrators have gained a renewed appreciation of teachers as active participants who construct and act on knowledge about their craft. There has been a corresponding shift in research from a focus on teacher effectiveness and behaviors toward the

study of how teachers make sense of their craft--their constructs about the nature of knowledge, teaching and learning, and how these beliefs play themselves out in the classroom. (Clark, 1988; Richardson, 1994)

Within this evolving context, Expeditionary Learning Outward Bound has designed a professional development experience--we called it a summit--which aims to draw upon teachers' knowledge about their craft while introducing them to new practices and subject matter. Summits accomplish this by immersing teachers in a week-long learning expedition focused on a particular subject. Each of this summer's three summits had its own focus: architecture (taught by Ron Berger and Russann Cook), geology (taught by Ron Berger and John Reid) and the Cherokee Indian Nation (taught by Bill Anderson and Leo Snow). Expeditionary Learning's Mary Johnston organized and designed the summits in partnership with these teachers.

During the summits teachers gain a chance to participate as learners and deepen their inquiry about their practice. In collaboration with "master teachers" as well as university professors, they develop their own professional expertise in the subject matter that they will teach; they get ideas about how to integrate the content they learn at the summit into their own classrooms; and they have as opportunity to observe and work with a master teacher modeling a learning expedition.

The following are personal impressions of the architecture summit, held July 11-17 in Portland, Maine.

Portland, Maine
July 13, 1994

I'm sitting in our workroom--a small studio with drafting tables packed tightly from end to end. It's hot outside, but an ocean breeze reaches us through several windows over-looking the Southern Maine Technical College where we'll be based for the next five days. If you look out the east facing window you'd see the Casco Bay and the waves crashing on the beach below. But no one lifts his or her head to take in the view. Our attention is fixed on the floor plans in front of us. If we do look up, it's only to get a quick "critique" from a neighbor, search for the architect's scale or a template.

The intensity and purposefulness has this room feeling like an architect's office racing to meet an important deadline. That's just the kind of atmosphere that Ron Berger and Russann Cook want. As educators, Ron and Russann believe in immersing their students in a discipline as professionals know it. We handle professional quality tools and materials. The language of the craft has infiltrated our conversations. Terms of art like cornice, lintel, ell and bearing wall that would have seemed foreign only a day ago are tossed around with ease. To be sure, we're apprentices, not professionals. But there's a seriousness about the work, a set of expectations and standards and as attention to detail that only comes from immersing yourself in the culture of a profession.

The ebb and flow of erasers, Prismacolor pencils, specifications and ideas is something of a mystery to me. I can never seem to follow their movements. Someone borrows a staircase from a Frank Lloyd house. He spends an hour meticulously rendering it to scale. A little while later it appears, slightly altered, in someone else's drawing. At another time, someone discovers the proper distance of a sink from other

fixtures in a bathroom. When it comes time for someone else across the room to design her own bathroom she appears to have plucked the precise measurement out of the air.

The format of each day is largely the same. After breakfast Russann Cook, a teacher, professional architect and Ron Berger's co-leader, instructs us in the techniques and skills we will need to become proficient draftsmen. The first day we were introduced to the tools of our trace. Yesterday we learned to use an architect's scale--a triangular ruler-like instrument that enables us to work in scale. Today we learned the art of calligraphy. Following the technical session we adjourn to another "space" (the word room seems to have vanished from our vocabulary) where Ron invites us to try our hand at a design--i.e., a police station for a town of fifty thousand people--and a "quick challenge"--i.e., constructing a bridge or tower from toothpicks, clay and gum drops. Afterward we wander around the gallery of structures and designs laid our on the tables or hanging from the walls before settling down to critique the work of one of two brave individuals who want feedback on their work from the entire group. After lunch it's back to our primary project of the summit: designing a house. The evenings are taken up with lectures, discussions or field trips to study local architectural exemplars.

The high level of standards, the late hours, the exacting work have been stressful for some, exhilarating for others. But Ron is clear, be wants from us what we want from our students: the best quality work we're capable of producing. For some this means altering the parameters of the project to make it more meaningful.

One of the themes of the summit has been how to maintain high standards while allowing students to make projects their own. Ron calls it negotiating. "I like negotiating." He tells us. "I want students to bargain with me. When I start a project with my class I often start by saying, `This is the project that we're doing and I have these things tat are non-negotiable.' But these things are negotiable. I knew some of you wanted to change the project a bit or wanted to not attend some of the evening sessions so you could work on your project. That's okay. Your students should always be thinking how they can move the expedition in their direction so it more closely with their interests and passions while at the same time meeting their teacher's goals."

When we start staking out those non-negotiable we are led into a fascinating discussion on the tension between being faithful to the demands of the profession, while making room for learners to shape the project according to their own interests. Time is running out and Ron's in favor of giving us the option of using graph paper. This is strictly a novice's shortcut; real architects would never dream of using it. But if we use this method are we compromising our learning by failing to work within the standards of the profession? Why shouldn't we set our own standards, especially if they insure that we all succeed?

Later, another issue comes up that raises a similar set of questions. Russann, the professional among us, feels that our project should reflect the kind of assignment that a real architect might be faced with. We're given a rough biographical sketch of a family and its requirements. the challenge is to design a house that fits the family's needs. It's a good workout; you have to get inside the mind of each family member. But some of us want to do a project that's more

personally meaningful, like designing a house for our own family. Russann doesn't budge. In her view that would make critiquing, a mainstay of the profession, impossible. Ron counters, "I know what Russann is saying, `If some of you are designing igloos and others are designing homes for the rainforest then we won't be able to talk to one another.' But I'm saying, "Wait a minute, we're talking about a 2,500 square foot home for this hypothetical family, or a 2,500 square foot home for my family.' There's really not much of a difference. I don't think it's going to hurt our overall goal." Russann agrees.

But the real spirit of this summit is captured by the many forms of critique--two people standing over a drafting table late at night discussing the use of natural lighting--and the more formal sessions where teachers present their work to the entire group. One morning an exasperated teacher asks for help. Three people hover over her table proving ideas, encouragement and gentle critiquing. Before too long she's back to work. Throughout, questions hang in the air. How can I preserve a sense of intimacy while making my house welcoming to guests? How can I create formal spaces for entertaining guests while making them useful to the family when guests aren't around? How can I bring together the natural world and indoor spaces so the boundaries between the two are blurred? In the end, it's these moments, and the care and attention to the work, that bring us together around drafting boards and blueprints, sharing our guesses, impressions and our Staedtler Mars DunaGraph 10050 N2 Graphite pencils.

TECHNOLOGY USE

Implementation Levels and Outcomes

> *The Co-NECT design provides a vision of a technological infrastructure featuring unimpeded access to video equipment, computers and software tools for all members of the learning community, and a flexible communication network linking all computers in the school with each other, and with computers around the world.*

* Observations and interviews suggest that an active video culture has emerged at the John Adams New American School. A video coordinator supports wide availability and widespread use of video equipment; students produce a half-hour broadcast each morning; video recording of student work and school events is commonplace. Students produce radio broadcasts for local AM and public access stations.

* The school has a large number of computers (computer/pupil ratio), an Internet connection, and local area network. Students make frequent use of HyperStudio and Mosaic.

* Technology use was the most frequently cited Co-NECT design strength in 1994 surveys of students and parents.

* Teachers rated technology use as a very important design element in summer 1994 surveys.

TECHNOLOGY USE

Research and Additional Observations

The observations given above and described here are based on interviews with key staff members, parents, and participating design team members. Additionally, surveys of student attitudes were carried out in spring 1994. Parents were asked in 1994 parent/teacher/student conferences to describe the strengths and challenges of the John Adams New American School; 21 teachers were administered the Co-NECT Design Questionnaire during the summer.

In response to open-ended survey questions about the things they most like about their school, intermediate (29%) and advanced level (43%) students most frequently discussed computer and video technology. Likewise, parents most frequently gave technology as a school strength. In their ratings of the 26 Co-NECT design elements, teachers said they strongly valued the design's emphasis on technology.

Observations and interviews provide additional information about the emergence of a video culture. The video coordinator trained students to put together half hour news broadcasts containing both school news and news about the wider community. Students develop scripts, read the news, conduct interviews, run cameras, and control the production. They also produce radio broadcasts for two local stations. More and more teachers are having students document work in class.

The uses of computers are mainly tool uses, electronic communication, Mosaic and spreadsheet applications. There is some waiting to use computers, but access may be better at this school than almost any other in the country. A major problem in creating a computer culture is scarce expertise in the kinds of software available for schools and how they can be modified and used most effectively in classrooms. The technology coordinator principally has been concerned with hardware to date. As a computer culture evolves at the school, such expertise may develop among the teachers.

Adapted from Co-NECT Phase 2, Year 2 Second Quarter Report, January 1995.

TECHNOLOGY USE

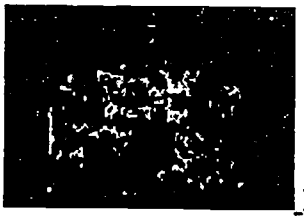
Student Project

Students in the Intermediate Cluster are in the process of developing this photo file as part of a project investigation on Fiji. The photographs of Fiji, were taken by Linn Gerrard, EarthCorps Volunteer to Fiji in July 1994.

The scanned images will be used for the creation of hyperstacks on different aspects of Fiji life, culture, and environment.


Picture #1

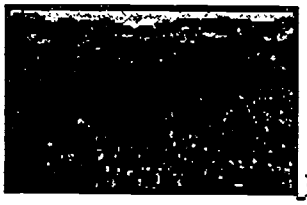
This is a picture of Earthwatch members doing a bio-diversity study and sorting out different plants inside a Fijian hut.


Picture #2

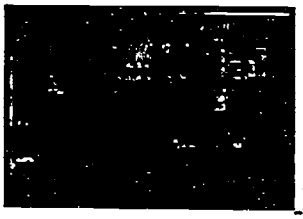
This is a picture of the Earthwatch crew from all around the world learning about the Fijian culture and landscape.


Picture #3

Here is a traditional bure or hut in a Fijian village made of thatch and split bamboo. They have to rebuild these houses every three or four years.


Picture #4

This is a picture of the bush and mountain landscapes showing Fiji's rich bio-diversity.


Picture #5

This picture shows the inside of a bure showing mats and tapa cloth decorations.


Picture #6

This is a picture of a Fijian village showing modern huts made out of cinder blocks, corrugated iron roofs and wood.

COMPREHENSIVE STUDENT AND PROGRAM OUTCOME INFORMATION

Implementation Levels and Outcomes

* In 1993/94 the attendance rate at John Quincy Adams New American School increased a full percentage point from a baseline of 94%.

* John Quincy Adams saw increased parental involvement in 1993/94; we recorded 4,447 hours of parent involvement in Constructive Actions©.

* Over 125 community residents participated in or were affected by students' Constructive Actions©.

Audrey Cohen holds broad goals for improving student attendance; reducing retention, suspension and dropout rates; effecting successful transitions to work, the military, and post-secondary education; increasing teacher attendance and retention rates; and extending parent and community member volunteer efforts.

* Over 30 business and non-profit institutions were recruited as sources of educational experiences.

GENERAL STUDENT AND PROGRAM OUTCOME INFORMATION

Research and Additional Observations

Attendance levels, parent and community member involvement rates, and business participation levels met benchmark predictions. The already high attendance rate rose. Referrals for discipline problems decreased.

Parents became increasingly involved in school affairs and their children's learning. At John Quincy Adams, the principal remarked that "there is a new enthusiasm for learning . . . parents are excited and involved; they show a keen interest in the program and a greater willingness to work with their children's school." Parent responses are described below.

Community involvement levels also increased. According to the staff resource specialist, "People in the community are very interested in giving their time to help children learn about their particular areas of expertise, and they're very happy to return. They think our children are learning at a much higher level than most school kids they met." This statement is characteristic of the sentiment expressed by local community members who benefit from the students' Constructive Actions©.

John Quincy Adams established numerous partnerships with neighborhood organizations or institutions in 1994/94--including the opera, Natural History Museum local Price Club, Zoological Society, Museum of Man - Art of Ancient Civilizations, League of Women Voters, and local government offices and chambers of commerce.

Adapted from Audrey Cohen Year 1 Phase 2 Report, January 1995.

GENERAL STUDENT AND PROGRAM OUTCOME INFORMATION

Parent Responses to the Program

On a John Quincy Adams School survey, parents' responses were "overwhelmingly favorable and validated for us that we had chosen a program that makes a difference for all students." Parent comments on this school-wide survey included the following:

- "My son is much happier attending school."
- "...Kids are excited about learning. . ."
- "Students become a community within themselves; they care about one another and their community."
- "I like the idea that all children have a Purpose and know what it is. They also know the action they are to take to fulfill that Purpose."

One parent pointed to a special advantage that parents may gain from their children's community involvement:

> In talking with my daughter about the Purpose of *We Use Government to Improve the Community*, she gave me insight on the community and government working together. I am grateful for these studies because not only does it help the children learn, ... it also pushes me to get involved in my community.

Parents also were pleased about their new role in the education of their children. This attitude was characterized by the following comment:

> The Constructive Action truly helped build a family and school relationship because it created the foundation for future relationships with parents and local businesses and this is something for which we are grateful.

SUMMARY OF PROGRESS, CHALLENGES AND RECOMMENDATIONS FOR FUTURE WORK

Progress

In examining progress and framing recommendations for reform at George Washington New American School, we adopted a model of school change that relies on the importance of clear vision, the driving force of strong leadership, and the role of teacher learning in classroom and school improvement. It says that change depends on a pervasive commitment to and concern with learning and student engagement.

Surveys, interviews and ethnographic reports suggest that the *Expeditionary Learning* principles fostered school-wide cohesion around a unifying philosophy. Students and teachers came to understand our community's principals of intimacy and caring, responsibility for learning, and diversity and inclusivity. Students were active and conscious participants in the creation of *Expeditionary Learning* classrooms. They played an important role in planning expeditions and evaluating their work. Students were seen to feel both the burden and exhilaration of taking responsibility for learning.

George Washington teachers felt that the design provided them both freedom and support for designing interdisciplinary curricula, focusing on meaningful questions, and embracing a pedagogy emphasizing student discovery and teacher as guide. Teachers said the design liberated them from stultifying instructional approaches. Teachers said the program enhanced their teaching skills, fostered teamwork, and provided for professional renewal. Teachers' perceptions that they are valued professionals and their renewed interest in teaching confirm the power of *Expeditionary Learning*'s professional development approach. Teachers felt they were central bridges to school and classroom improvement.

Challenges and Recommendations

Next year greater emphasis should be placed on the full range of areas that need to be addressed in teacher professional development and on contextualizing professional development to meet the needs of the school. In addition, professional development should focus on the teaching strategies and skills required to help all George Washington students become successful learners. Staff expertise on these issues could be drawn from other *Expeditionary Learning* schools, as well as, from local experts.

Our *Expeditionary Learning* partners need to tailor professional development to the different experience levels of teachers--veterans, inexperienced teachers, and teachers new to the design--all have different needs and require different types of professional development activities.

In George Washington New American School, leadership was developed in all areas deemed critical to school change and was a powerful driving force behind the change efforts. Leadership at the district level was uneven, however; and the role of leadership in improving instruction and organizing support for the design and execution of expeditions is particularly important. We and our *Expeditionary Learning* partners

need to consider the character of professional development needed to improve and support leadership.

Taken (loosely) from EL/OB First Year Implementation Report, 9/94.

PORTFOLIO APPENDICES

System and School Context Data

Table 4
James Madison New American School Context Data for 1993/94

Location-Type	Urban - public
Enrollment	235
Attendance rate	89%
Attrition rate	new=62; left=59
# Special ed referrals	(35=lev 4, 15=lev 3)
# In community projects	50%
# Returning staff and teachers	100% + some new staff
Average # applications per slot	6
# Conference dates	3 plus shorter-term written progress reports
Metropolitan Achievement Test scores (National percentile-stanine, comprehensive battery)	
Grade 6	41-5
Grade 7	27-4
Grade 8	20-4

NOTE: CLC Narrative Progress Report, January 1995.

STANDARDS AND ASSESSMENT DATA

Massachusetts Educational Assessment Program

SUMMARY OF TEST RESULTS FOR MATHEMATICS

ID: 348275
District: Worcester
School:
Date: April, 1994 Grade: 4

PROFICIENCY LEVEL	ALL STUDENTS				Student Categories											
					Special Needs				Transitional Bilingual				Other			
	State %		School %		State %		School %		State %		School %		State %		School %	
	1992	1994	1992	1994	1992	1994	1992	1994	1992	1994	1992	1994	1992	1994	1992	1994
Mathematics <I	6%	4%	28%	15%	13%	9%			25%	20%			5%	3%	28%	14%
I	38%	34%	62%	82%	51%	51%			53%	54%			37%	32%	68%	80%
II	39%	45%	8%	15%	28%	33%			17%	22%			40%	47%	7%	17%
III	15%	13%	0%	8%	7%	5%			5%	3%			16%	14%	0%	9%
IV	2%	4%	0%	0%	1%	1%			1%	1%			2%	4%	0%	0%

Below Level I:

The open-ended responses of students in this category provide insufficient information to evaluate their proficiencies. However, students in this category are able to answer some multiple-choice questions correctly.

Level I:

Students at this level can carry out basic numerical operations, such as rounding with two-digit numbers and subtraction with borrowing. When problems are presented in a practical context, with illustrations, they are able to go beyond the simple recognition of facts and are able to apply their knowledge to recognize a correct solution.

These students experience difficulty when asked to create their own response, however, in contrast to recognizing a correct option. They perform simple computational problems well, but when presented with problems in unfamiliar contexts they show minimal understanding of how their computational knowledge is related to the tasks.

Level II:

In response to multiple-choice questions, students at this level show a good sense of number operations, can translate both verbal and visual situations into number sentences, and can work with simple decimal operations. They can solve one-step word problems requiring multiplication or division and multistep problems involving addition and subtraction. Not only can they read scales and graphs, but they can recognize a reasonable interpretation from a set of plausible options.

These students experience less success when asked to respond to open-ended questions. Although they can read charts and graphs, they cannot furnish their own interpretations of the data. Despite their ability to perform routine problem solving, they are unable to apply their knowledge to real-life situations. Their responses show evidence of some ...tual understanding of the tasks and number sense, but these students seldom go ...d a minimally acceptable response to the problems presented.

Level III:

Students at this level appear confident in their ability to work with numbers. They are beginning to understand number as a variable. They can solve simple equalities and recognize the use of variables in the translation of word problems. For example, in response to multiple-choice questions, these students recognize sequences, patterns, and functions of simple operations. Furthermore, they are willing to attack verbally complex word problems by analyzing content and distinguishing between necessary and irrelevant information.

When responding to open-ended questions, these students recognize the application of mathematics to everyday situations. Faced with problems, they use appropriate strategies, such as constructing diagrams, tables, and charts. Although they demonstrate an understanding of mathematical concepts and provide arguments in support of their answers, they experience some difficulty in expressing their reasoning.

Level IV:

In general, the abilities that characterize these students are not computational but conceptual. In response to multiple-choice questions, they show an understanding of the relationship between numbers and quantities, pay close attention to detail, and apply mathematical reasoning skills to a variety of problems. They are neither distracted nor discouraged by unfamiliar and complex formats, but are able to recognize the essential features of a problem.

In response to the open-ended questions, these students effectively communicate mathematical concepts using mathematical language that is appropriate for their age. They provide fully developed examples; construct strong, appropriate arguments; and use a variety of methods to illustrate their comprehension. Their close attention to detail allows them to achieve a higher level of accuracy than students in the previous levels.

Massachusetts Educational Assessment Program

SUMMARY OF TEST RESULTS FOR SCIENCE

ID: 348275
District: Worcester
School:
Date: April, 1994 Grade: 4

PROFICIENCY LEVEL		ALL STUDENTS				Student Categories							
						Special Needs				Transitional Bilingual			
		State %		School %		State %		School %		State %		School %	
		1992	1994	1992	1994	1992	1994	1992	1994	1992	1994	1992	1994
Science	< I	5%	4%	32%	8%	11%	8%			31%	23%		
	I	41%	32%	59%	54%	49%	47%			53%	57%		
	II	34%	45%	9%	31%	27%	36%			12%	16%		
	III	18%	16%	0%	5%	11%	6%			4%	2%		
	IV	2%	4%	0%	3%	1%	2%			0%	1%		

Other			
State %		School %	
1992	1994	1992	1994
4%	3%	31%	8%
39%	30%	59%	54%
36%	47%	10%	31%
19%	16%	0%	6%
2%	4%	0%	3%

Below Level I:

The open-ended responses of students in this category provide insufficient information to evaluate their proficiencies. However, students in this category are able to answer some multiple-choice questions correctly.

Level I:

Students at this level are familiar with scientific facts that form part of common experiences or are the focus of children's literature and television. For example, they know that bears hibernate during the winter.

They apply a practical logic to answering multiple-choice questions that are placed in simple, everyday contexts. They respond well to problems that use visual elements or illustrations: interpreting map symbols, ordering a visual sequence, and reading simple graphs.

In answering open-ended questions, students display a grasp of facts in various scientific disciplines. They can make simple observations. They resort to general factual knowledge but do not recognize the requirements of the task. For example, when asked for similarities and differences among a tree, a dog, and an insect, they identified very trivial and obvious differences such as "a tree is larger than a dog or insect." Their answers often appear incomplete because of poor reasoning skills, lack of examples, an inability to interpret data, and a tendency to restate the facts.

Level II:

Students at this level begin to recognize some regularity in the world. They understand the need for scientific processes, such as observing and collecting data when conducting an experiment. Compared with students at Level I, they show a greater ability to apply their knowledge to evaluate a set of options. Their factual knowledge is demonstrated by the multiple-choice results.

In answering open-ended questions, students display fact-based knowledge strengthened by some comprehension and understanding. They are accurate observers but tend to describe rather than interpret data. They make direct associations with ease but falter at predicting long-range outcomes. When asked to construct an experiment, these students do not appear to recognize the need for controls and multiple trials. Their answers are minimal, lacking elaboration and examples.

Level III:

Students at this level have a much broader base of knowledge. Their responses suggest attention to small but significant detail. In addition, these students show some understanding of scientific concepts. For example, they recognize and understand the functions of various sense organs.

Students at Level III begin to make connections between the abstract and the concrete and successfully incorporate prior knowledge with new concepts. Although they can display data appropriately, their ability to generalize remains weak. When given a set of data about the kinds of fruit fourth graders prefer, students arrive at very specific rather than general conclusions, e.g., "seven students like bananas and twelve like apples." Often, careless observations affect their generalizations and conclusions and they do not retest or re-examine work. Although their answers are generally adequate, showing some reasoning and accurate conclusions, Level III students remain within the confines of the question and do not elaborate a great deal.

Level IV:

Students at this level possess scientific and practical information that goes beyond what they are taught. They are beginning to deal with abstract concepts. In response to the multiple-choice questions, they display a knowledge of vocabulary and essential facts that they can assimilate and apply. In general, their broader knowledge and confidence allows them to use their reasoning skills more than students at lower levels of proficiency.

They are able to link facts, concepts, and observations to arrive at accurate conclusions. Additionally, they are able to represent data in many ways. Students use prior knowledge at all proficiencies, but the most proficient students use appropriate knowledge to demonstrate an abstraction. Students at this level are able to transfer skills from one discipline to another. Their answers demonstrate depth of understanding as well as elaboration.

- A.37 -

Massachusetts Educational Assessment Program

SUMMARY OF TEST RESULTS FOR SOCIAL STUDIES

ID: 348275
District: Worcester
School:
Date: April, 1994 Grade: 4

PROFICIENCY LEVEL	ALL STUDENTS				Student Categories											
					Special Needs				Transitional Bilingual				Other			
	State %		School %		State %		School %		State %		School %		State %		School %	
	1992	1994	1992	1994	1992	1994	1992	1994	1992	1994	1992	1994	1992	1994	1992	1994
Social Studies <I	7%	4%	41%	10%	15%	10%			39%	24%			6%	3%	38%	11%
I	37%	34%	53%	54%	47%	49%			44%	55%			38%	32%	55%	51%
II	37%	45%	3%	26%	28%	33%			13%	17%			39%	46%	3%	26%
III	17%	13%	3%	8%	8%	8%			4%	3%			18%	14%	3%	9%
IV	2%	5%	0%	3%	1%	2%			0%	1%			2%	5%	0%	3%

Below Level I:

The open-ended responses of students in this category provide insufficient information to evaluate their proficiencies. However, students in this category are able to answer some multiple-choice questions correctly.

Level I:

Students at this level perform well when tasks are presented visually. They can use simple keys, read graphs and maps, and combine information. Aided by a picture, they recognize similarities and differences. They can recognize the correct option from a given set. Although they have a store of general knowledge, they appear to have limited information about the larger world. Classroom experience does not seem to remediate this.

When answering open-ended questions, Level I students respond superficially with limited interpretation of questions pertaining to community, voting, and chronology of historic events. They understand what rules are, but not why they exist. While Level I students recognize different geographical regions, they have difficulty articulating the differences. They know the vocabulary of social studies, but are not always able to use that vocabulary appropriately. Poor reading skills affect their ability to answer.

Level II:

Students at Level II grasp the basic content presented in an elementary school curriculum. They can classify people according to their roles; have some knowledge of American cultural diversity; and understand certain economic concepts. When given a set of options, they can reason about the information to distinguish fact from opinion and place events in chronological order.

Their open-ended responses generally remain personal and concrete, focusing on how the world affects them. Level II students can select pertinent details from long passages and occasionally evaluate those details as evidence. When asked to compare and contrast modern and colonial kitchens using pictures, their answers, again, are concrete, limited to details shown in the pictures rather than using them as springboards to larger concepts. They recognize the effects of change but cannot determine the causes. They have some ability to read maps and can identify some attributes of different sites. Unlike Level I students, they can answer a multipart question with some correctness.

Level III:

Students at Level III are more aware of community and levels of government. They understand some major concepts such as needs vs. wants and cause and effect. They are distinguished by their ability to evaluate information to identify the best response from a set of plausible options.

In their written responses, they exhibit an objective point of view. They comprehend human geography and have a sense of chronology. They understand the causes of change. They can interpret data but cannot draw inferences based on the data. Not only do they select and evaluate evidence, but they use it to support positions. Students at this level recognize that there may be more than one problem-solving strategy and that each strategy has advantages and disadvantages. Their answers are adequate but lack elaboration and lack examples that enrich the responses and demonstrate strong reasoning skills.

Level IV

Students at Level IV show clear reasoning ability: They are skilled at inferring from data, recognizing assumptions, and justifying their responses. Their knowledge of history goes beyond benchmark dates and events; they understand some underlying historical currents.

When constructing open-ended responses, students at Level IV combine strong critical thinking skills with significant prior knowledge to generate logical, well-supported answers. They go beyond the simple requirements of the question by synthesizing diverse information and making meaningful generalizations. They can organize and interpret data to make comparisons, draw inferences, and arrive at conclusions. They discern subtleties such as irony and social satire. They know current events and can discuss them cogently.

Their answers are elaborated and well supported with evidence and appropriate examples. They display depth of thought and understanding.

Massachusetts Educational Assessment Program

SUMMARY OF TEST RESULTS FOR WRITING

District: Worcester
School:
Date: April, 1994 Grade: 4

PROFICIENCY LEVEL		ALL STUDENTS				Student Categories											
						Special Needs				Transitional Bilingual				Other			
		State %		School %		State %		School %		State %		School %		State %		School %	
		1992	1994	1992	1994	1992	1994	1992	1994	1992	1994	1992	1994	1992	1994	1992	1994
Writing	<I	8%	7%	31%	0%	10%	13%			20%	22%			5%	6%	22%	0%
	I	28%	34%	34%	54%	38%	44%			38%	43%			25%	33%	37%	57%
	II	46%	42%	31%	31%	41%	35%			33%	28%			46%	43%	37%	29%
	III	19%	14%	3%	15%	11%	7%			8%	6%			20%	15%	4%	14%
	IV	4%	2%	0%	0%	1%	1%			1%	1%			4%	2%	0%	0%

Below Level I:

The open-ended responses of students in this category provide insufficient information to evaluate their proficiencies. Writing is not assessed using multiple-choice questions.

Level I:

Students at this proficiency level are not able to communicate with the reader. They approach the tasks as they would a worksheet question. Although relevant, their responses tend to be minimal, usually limited to a single sentence. If they use more than one sentence or idea, there is no attempt to connect them in logical sequence. Ideas are expressed in vague terms with few specific details and little elaboration.

The responses of students in Level I exhibit a disproportionate number of errors in surface features (spelling, punctuation, capitalization, and usage). These errors may be so numerous as to interfere with the reader's ability to understand the text.

Level II:

Students at this proficiency level are able to achieve basic written communication. They go beyond the simple one-sentence responses that characterize students at Level I. Their paragraphs show rudimentary development, consisting of predictable, simple sentences with unelaborated or repetitious details. There is some attempt at organization; however, traditional organizational features, such as topic sentences and conclusions, are missing. In their arguments, these students attempt to show a progression of thought, but there are lapses or shifts in logical development. Like students in Level I, these students use very simple language that is not always appropriate for the topic. They have not acquired the notion of formal language.

In general, students at Level II display more control over the mechanics of writing than students in the lower levels. They lack skills in the areas of topic development, organization, and detail.

Level III:

Students at this level are beginning to show a sense of audience and can adequately communicate their knowledge and ideas. They respond to questions with a topic sentence and go on to develop their ideas sufficiently. They use complex sentences with predictable structures. They have an awareness of paragraph formation, but lack complete command.

These students understand the need for support and provide details appropriate to their conclusions. In addition, their writing involves interpretation as well as exposition, signaling the beginnings of abstract thought.

Some errors in surface features are found in students' work, but they do not interfere with the reader's ability to understand the text.

Level IV:

Students at this proficiency level communicate clearly and effectively with their audience, expressing themselves with a sense of style and voice. Their work shows an effective variety of sentence structure and length. They support their main idea with interesting and pertinent details and rich language. Their transitions, not only from sentence to sentence, but also from paragraph to paragraph, are smooth and reasonable. By establishing and maintaining a purpose, these writers construct a logical progression of ideas that leads to sophisticated conclusions.

Some surface errors may be found, but they do not detract from the writer's ability to communicate.

Massachusetts Educational Assessment Program

SUMMARY OF TEST RESULTS FOR READING

ID: 348275
District: Worcester
School:
Date: April, 1994 Grade: 8

PROFICIENCY LEVEL		ALL STUDENTS				Student Categories											
						Special Needs				Transitional Bilingual				Other			
		State %		School %		State %		School %		State %		School %		State %		School %	
		1992	1994	1992	1994	1992	1994	1992	1994	1992	1994	1992	1994	1992	1994	1992	1994
Reading	<I	13%	10%		10%	28%	24%			35%	29%			12%	8%		10%
	I	30%	30%		35%	40%	43%			28%	35%			28%	29%		35%
	II	28%	33%		30%	19%	23%			19%	20%			27%	34%		30%
	III	24%	14%		20%	10%	8%			15%	8%			25%	15%		20%
	IV	7%	13%		5%	2%	4%			4%	7%			7%	14%		5%

Below Level I:

The open-ended responses of students in this category provide insufficient information to evaluate their proficiencies. However, students in this category are able to answer some multiple-choice questions correctly.

Level I:

Students at this level perform well on multiple-choice questions linked to high-interest informational passages and short narratives. They are able to grasp the main ideas of such passages and to locate information within the text or closely related to it. They can recognize simple inferences that are based on general information or common sense, and can distinguish between clearly demarcated facts and opinions.

These students experience more difficulty when asked to generate their own responses. Their answers are typically literal rather than analytic, referring directly to factual details.

Level II:

Students at this level are able to evaluate a set of plausible multiple-choice options and choose the best inference about character and motivation. They can also differentiate among statements that hold similar meaning and can identify judgments based on evidence presented in the passages.

They are less successful when presented with an open-ended question. Understanding and communicating the literal is a hallmark of responses at this level. Students may be able to identify the tone or theme of a passage, but they are not skilled in analysis or persuasion. Similarly, informational material is more accessible to them than is fiction (particularly fiction incorporating satire, metaphor, or other literary devices) or poetry. Since they find it difficult to recognize nuances, they do not go beyond the literal.

87

Level III:

Students at this level are able to go beyond the literal to construct meaning from the text. They apply reasoning and prior knowledge to draw inferences.

These students are also able to distance themselves from content and begin to judge the craft of writing itself. For example, in response to multiple-choice questions, they recognize why a particular title was chosen, the functions of selected parts of a passage in contributing to the whole, and the purpose of certain format conventions. They are able to recognize the tone of a humorous fable and to identify different types of literature. When presented with more sophisticated genres such as parody or satire, however, they fail to recognize the humor or the multiple levels of meaning in the passage.

Their responses to the open-ended questions are reasonable and coherent. Their approach is orderly; however, it lacks sufficient analysis or detail to make it convincing.

Level IV:

Students at this level are distinguished by their ability to reason and form judgments in a range of situations. In response to multiple-choice questions, these students could correctly abstract meaning, draw conclusions, and make inferences. Many questions require mature judgment and fine discrimination to choose the most correct response from a set of plausible options. Others require students to apply the ideas presented in the text to other contexts.

Students at this level exhibit a more sophisticated understanding of the craft of writing than students at the lower levels. Not only are they familiar with stylistic devices, poetic forms, irony, and metaphor, they also show an understanding of the characteristics of different genres.

In their own writing, they effectively organize materials and easily generalize from specific textual examples to more abstract and inclusive themes. Their vocabulary is extensive. Not only do they show an ability to recognize nuances in the meaning of words (e.g., immediate versus underlying causes), but they use that understanding in their discussion.

A.40

88

Massachusetts Educational Assessment Program

SUMMARY OF TEST RESULTS FOR MATHEMATICS

ID: 348275
District: Worcester
School:
Date: April, 1994 Grade: 8

PROFICIENCY LEVEL	ALL STUDENTS				Student Categories											
					Special Needs				Transitional Bilingual				Other			
	State %		School %		State %		School %		State %		School %		State %		School %	
	1992	1994	1992	1994	1992	1994	1992	1994	1992	1994	1992	1994	1992	1994	1992	1994
Mathematics <I	8%	8%		5%	19%	21%			19%	21%			7%	8%		5%
I	39%	36%		60%	57%	54%			42%	38%			37%	34%		60%
II	28%	37%		25%	18%	20%			20%	27%			30%	39%		25%
III	19%	14%		10%	5%	3%			14%	8%			20%	15%		10%
IV	6%	6%		0%	1%	1%			5%	5%			6%	8%		0%

Below Level I:

The open-ended responses of students in this category provide insufficient information to evaluate their proficiencies. However, students in this category are able to answer some multiple-choice questions correctly.

Level I:

Students at this level recognize the results of basic numerical operations with whole numbers and some types of fractions (e.g., subtracting fractions with common denominators). They can identify the correct operations required by simple word problems, are familiar with some geometric terms (e.g., diameter), can identify common plane figures, and can read information contained in charts and histograms.

When presented with open-ended questions, they apply a trial-and-error strategy to solving simple problems, but experience difficulty in interpreting problems presented in unfamiliar formats or contexts.

Level II:

Students at this level have a basic understanding of the numerical skills and concepts that form the basis of the elementary school curriculum. In response to multiple-choice questions, they can recognize the results of a wide range of numerical operations involving whole numbers, decimals, and fractions, presented as computation or word problems. When given a set of options, they recognize the correct evaluations of various expressions and the correct use of formulas. This suggests that they are beginning to acquire the skills necessary for algebra.

When presented with more challenging open-ended questions requiring numerical reasoning, they are not dependent on familiar contexts. For example, they understand that the size of the product or sum of two sets of numbers is determined by the arrangement of the digits in each set. Although they are willing to attempt unfamiliar or complex problems, they often do not recognize the relationship between the elements involved. In responding to questions, they find it difficult to express their reasoning.

Level III:

Students at this level respond well to questions in a multiple-choice format. They exhibit a thorough knowledge of numerical operations and some understanding of more complex numerical concepts, such as area and perimeter, factoring, and ratio. Beyond this, they show confidence in tackling problems that are as dependent upon reasoning as they are upon computational proficiency. They are also familiar with the less-traditional topics of the eighth-grade curriculum, such as probability. They recognize the use of variables and are generally more sophisticated in their use of symbolic language than students at Level II.

When asked to respond to the open-ended questions, these students understand the requirements of the problems and make good attempts at solutions. When problems are straightforward, such as interpreting and synthesizing data from graphs and charts, they are able to form reasonable conclusions. They find it difficult to organize complex data, however, and usually fail to consider some important variables.

Level IV:

Students at this level are knowledgeable about a wide range of mathematical terms and procedures. Their understanding of mathematical algorithms and concepts goes beyond recognition to suggest a much deeper level of understanding. When presented with open-ended questions, they can perform complex manipulations with numbers in order to solve problems. In the field of geometry, they know the necessary attributes for such figures as parallelograms and similar triangles and can recognize multiple lines of symmetry.

In addition to their numerical proficiency and geometric knowledge, these students display a well-ordered, reasoned approach to problem solving. When presented with complex word problems, they apply a variety of solution strategies, including the organization of data into charts and graphs. Not only do they understand and use appropriate symbolic representation, they can explain their reasoning with clarity and precision.

Massachusetts Educational Assessment Program

SUMMARY OF TES, RESULTS FOR SCIENCE

ID: 348275
District: Worcester
School:
Date: April, 1994 Grade: 8

PROFICIENCY LEVEL		ALL STUDENTS				Student Categories											
						Special Needs				Transitional Bilingual				Other			
		State %		School %		State %		School %		State %		School %		State %		School %	
		1992	1994	1992	1994	1992	1994	1992	1994	1992	1994	1992	1994	1992	1994	1992	1994
Science	<I	7%	11%		10%	14%	22%			17%	28%			8%	10%		10%
	I	38%	34%		30%	50%	43%			48%	35%			37%	33%		30%
	II	24%	35%		40%	20%	26%			17%	25%			25%	36%		40%
	III	27%	14%		20%	14%	7%			17%	8%			28%	15%		20%
	IV	4%	8%		0%	1%	3%			3%	3%			5%	7%		0%

Below Level I:

The open-ended responses of students in this category provide insufficient information to evaluate their proficiencies. However, students in this category are able to answer some multiple-choice questions correctly.

Level I:

Students at Level I are aware of the scientific aspects of everyday life, such as personal health and nutrition. They understand some fundamental concepts, such as the functions of various parts of the body and the classification of living things. When given a simple experimental system, they recognize the basic components of scientific procedures.

When presented with an open-ended question requiring experimental design, they neither recognize which variables must be controlled nor develop valid scientific procedures. They refer to familiar issues such as the environment, but cannot use that knowledge to generate a correct response. They experience difficulty in interpreting the requirements of the tasks.

Level II:

Students at this level are becoming aware of the relationships among basic scientific concepts. In the physical sciences, they can identify the practical effects of condensation and evaporation. In life sciences, they show some understanding of the food chain. Given a set of options, they can identify a logical conclusion that could be drawn from a set of data. They can also recognize a situation where sampling of data is appropriate and can identify relevant data-gathering techniques for a research question.

They experience difficulty when asked to do more than recognize a correct option (i.e., construct their own response). When presented with an experimental situation, they are unable to create a workable design. They cannot apply the scientific processes they identified in multiple-choice questions. They use a given set of data to justify obvious and immediate conclusions, rather than organizing the data to reach a more reasoned generalization. Although they recognize general principles, their analyses tend to be vague and their responses minimal, with little or no explanation.

Level III:

Students at this level show a deeper understanding of scientific concepts by applying them to a variety of situations in different contexts. They recognize the principles applicable to real-world situations (e.g., use of solar energy) and different science disciplines (photosynthesis as applied to marine algae). They can judge different types of information that might be relevant in answering research questions and recognize possible sources of experimental error. Given a set of observations, they select reasonable inferences.

At this level, students construct competent responses. They are knowledgeable about experimental procedure and can produce a satisfactory experimental design. They can organize raw data to reveal relationships but cannot draw inferences. Their generally adequate responses are characterized by a limited scientific vocabulary and a lack of elaboration and detail.

Level IV:

Students at this level possess an organized body of knowledge and a grasp of scientific processes. Typically, they integrate discrete bits of information from different sources and use newly acquired information to generate logical hypotheses. Many of the concepts they are comfortable with, such as the relationship between pressure and volume, show an integration of knowledge and reasoning ability that is typical of students at this level.

In their responses to open-ended questions, they display an understanding of a wide range of scientific concepts, such as the law of conservation of energy, the relationship between volume and the transfer of heat, and the effects of molecular movement. They can organize data and clearly illustrate the relationships among variables. When presented with an experimental situation, they can create a well-conceived design. Their explanations demonstrate advanced reasoning, with use of supporting evidence and appropriate terminology to clarify ideas.

Massachusetts Educational Assessment Program

SUMMARY OF TEST RESULTS FOR SOCIAL STUDIES

ID: 348275
District: Worcester
School:
Date: April, 1994 Grade: 8

PROFICIENCY LEVEL	ALL STUDENTS				Student Categories											
					Special Needs				Transitional Bilingual				Other			
	State %		School %		State %		School %		State %		School %		State %		School %	
Social Studies	1992	1994	1992	1994	1992	1994	1992	1994	1992	1994	1992	1994	1992	1994	1992	1994
< I	8%	10%		10%	18%	23%			23%	27%			7%	9%		10%
I	39%	34%		25%	53%	47%			44%	38%			38%	32%		25%
II	26%	34%		40%	18%	22%			15%	21%			27%	36%		40%
III	22%	15%		25%	8%	6%			15%	9%			24%	16%		25%
IV	5%	7%		0%	1%	2%			3%	4%			5%	7%		0%

Below Level I:

The open-ended responses of students in this category provide insufficient information to evaluate their proficiencies. However, students in this category are able to answer some multiple-choice questions correctly.

Level I:

Students at this level can respond to multiple-choice questions that depend upon a knowledge of basic topics, such as the duties and rights of citizenship. They are able to identify major American statesmen without establishing their historical context. They experience difficulty in comprehending the causes and effects of historical movements and in applying their factual knowledge in unfamiliar contexts. Given a map, they are unable to draw inferences concerning geographic or economic features. Their knowledge appears to remain at the "taught" level and their judgment is basically in terms of absolutes.

Level II:

Students at this level display a general knowledge about the world beyond the classroom, correctly answering multiple-choice questions dealing with the environment, current events, and World War II. Furthermore, they appear to retain and understand the taught curriculum.

These students can make simple inferences from graphs and charts and can identify the messages carried by political cartoons. They also show a familiarity with place geography, successfully locating the position of cities and states within the United States.

When given a set of options, they can identify the most plausible conclusion, distinguish between fact and opinion, and generalize correctly from a set of facts. They experience more difficulty when asked to construct an argument on their own. In response to open-ended questions, they find it hard to consider both advantages and disadvantages of a situation, and appear to lack the necessary information to make a convincing argument in a number of areas. As a result, their constructed responses tend to lack clarity and conviction, and are typically characterized by their brevity.

Level III:

Students at this level are able to go beyond the facts and taught definitions of the curriculum to recognize the underlying concepts. They are fluent readers and can read and interpret graphs in unfamiliar formats. For example, when presented with a technical chart containing economic and social statistics (e.g., gross national product, infant mortality, students per inhabitants), they can integrate the information to make some valid inferences about the countries represented.

Within the multiple-choice format, they can interpret and evaluate statements by spotting lapses in logic and inconsistencies. When asked to construct their own responses, they can structure arguments and recognize contrasting perspectives when the material is familiar to them (e.g., environmental issues). In response to less-familiar topics (comparisons of religions, the causes of immigrations, the impact of the Soviet break-up), their lack of detailed knowledge limits the effectiveness of their arguments.

Level IV:

Students at this level display a wide range of detailed information about present and past societies, as well as an understanding of historical relationships. Although their knowledge base extends far beyond the social studies curriculum, their most typical characteristic is their tendency to go beyond the specific facts to consider underlying issues and concepts. For example, when discussing a cartoon they are able to relate the cartoonist's message to the larger social and ethical issues that it represents. Similarly, when presented with an historical event, they are able to describe in detail how the same event could be judged differently when viewed from different historical perspectives. Asked to review a more current political situation, they can cite both positive and negative arguments before coming to a reasoned conclusion.

These students are careful, thoughtful readers who pay attention to significant details and shades of meaning. In response to multiple-choice questions, they can evaluate statements for assumptions and bias. In response to open-ended questions, they can interpret written material in terms of current, as well as historical, issues and events.

Massachusetts Educational Assessment Program

SUMMARY OF TEST RESULTS FOR WRITING

ID: 340278
District: Worcester
School:
Date: April, 1994 Grade: 8

PROFICIENCY LEVEL		ALL STUDENTS				Student Categories											
						Special Needs				Transitional Bilingual				Other			
		State %		School %		State %		School %		State %		School %		State %		School %	
		1992	1994	1992	1994	1992	1994	1992	1994	1992	1994	1992	1994	1992	1994	1992	1994
Writing	<I	9%	10%		0%	16%	19%			19%	22%			9%	8%		0%
	I	27%	34%		40%	42%	51%			33%	40%			26%	33%		40%
	II	42%	42%		60%	33%	26%			35%	29%			43%	43%		60%
	III	18%	13%		0%	6%	4%			11%	8%			19%	14%		0%
	IV	4%	2%		0%	1%	0%			2%	1%			4%	2%		0%

Below Level I:

The open-ended responses of students in this category provide insufficient information to evaluate their proficiencies. Writing is not assessed using multiple-choice questions.

Level I:

Students at this proficiency level demonstrate little ability to communicate with a reader. Their responses are characterized by brevity, often limited to a single run-on sentence. When these students give more complete answers, their sentences often do not follow a logical progression. A rearrangement of sentences, for example, would not alter the meaning of the paragraph. In general, their responses have little or no development, using limited detail. Their sentence structure may be incorrect, with ineffective word choice. Their language is simplistic and their control of surface features (mechanics, grammar, spelling) is weak.

These students do not have a sense of audience and experience difficulty in judging the requirements of the task. Their responses tend to be concrete and personal rather than objective, often incorporating accounts of how their lives and immediate surroundings relate to the question.

Level II:

Students at this level are able to communicate in a rudimentary fashion. They attempt to organize their work in order to communicate with the reader and give fuller, more complete responses than students at Level I. Some logical and structural development is evident in their attempts at paragraph structure; for example, they may include introductions and conclusions to the paragraph.

These students are able to provide support for their arguments using contextual evidence, but their responses lack cohesion and completeness. Surface and syntax errors also interfere with the reader's ability to understand their writing.

Level III:

Students at this level communicate effectively, providing more developed responses. They seem aware of an intended audience, and their writing tends to be more formal and objective than experiential. The organization of their responses includes a topic sentence and conclusion. They establish a priority in the presentation of their ideas, with the main point(s) supported by appropriate, relevant details. Their writing often benefits from a more comprehensive knowledge of the subject and correct use of vocabulary.

These students have some errors in surface features, but those errors are never great enough to interfere with communication.

Level IV:

Students at Level IV communicate with clarity and effectiveness. Their writing conveys an awareness of the reader and, when appropriate, a clear voice. Their responses are well organized, both conceptually and in terms of structure. Different components of their response are clearly demarcated in paragraph form, with an overall coherence. They develop their topics subtly and with perception. They use effective language and a well-developed vocabulary, as well as including rich, interesting details that enhance their discussion and support their purpose.

Massachusetts Educational Assessment Program

SUMMARY OF TEST RESULTS FOR READING

ID: 348275
District: Worcester
School:
Date: April, 1994 Grade: 4

PROFICIENCY LEVEL		ALL STUDENTS				Student Categories											
						Special Needs				Transitional Bilingual				Other			
		State %		School %		State %		School %		State %		School %		State %		School %	
		1992	1994	1992	1994	1992	1994	1992	1994	1992	1994	1992	1994	1992	1994	1992	1994
Reading	<I	9%	5%	35%	13%	18%	11%			38%	27%			7%	4%	31%	14%
	I	32%	34%	47%	49%	43%	50%			41%	52%			31%	32%	52%	49%
	II	36%	40%	15%	33%	27%	30%			15%	17%			37%	41%	14%	31%
	III	20%	11%	3%	5%	10%	5%			5%	3%			22%	11%	3%	6%
	IV	3%	11%	0%	0%	1%	4%			1%	1%			3%	11%	0%	0%

Below Level I:

The open-ended responses of students in this category provide insufficient information to evaluate their proficiencies. However, students in this category are able to answer some multiple-choice questions correctly.

Level I:

Students at this level are able to answer multiple-choice questions pertaining to simply written, relatively short narratives, identify the setting of a story and the major story events, follow one-step directions, and locate information contained within the text.

Their vocabulary is limited to simple, commonly used words, but they are able to use contextual clues to recognize other words, provided that enough distinguishing features are presented.

These students experience more difficulty when responding to open-ended questions. They tend to identify details and repeat information from the passage rather than generate their own responses. Although they draw upon their personal experience and common sense, they often apply that knowledge inappropriately to the question.

Level II:

Students at this level show an ability to evaluate a set of multiple-choice options. They can identify a character trait and find literal evidence to support that trait. They are able to identify some details that are related but have difficulty determining the most important idea.

These students are less successful when asked to construct a response to an open-ended question. They are beginning to use reasoning skills but often their reasoning is flawed or incomplete. They are able to take a position, although they offer no explanations; or they may give generalized explanations, rather than use specific textual evidence.

Level III:

Students at this proficiency level are better able to deal with longer narrative passages of more complex style and subject matter than those at the lower levels. Their greater competence in reading allows them to remember details and to provide inferential evidence that is dependent upon a literal interpretation of the text.

They possess a more elaborate reading vocabulary than students at lower levels. They recognize the correct definitions of words, but they experience difficulty when words are used in a more figurative sense.

In response to open-ended questions, these students are able to draw conclusions with relevant support from the story. They can recognize the main idea of the passage and go beyond literal interpretation of the text. Specifically, they can infer character traits and provide supporting evidence. Conversely, given an inference, students can find relevant support from the passage. Although these students can answer the questions, their responses are not elaborate.

Level IV:

These students appear to have achieved a level of skill that allows them to consider passages as a totality, rather than as a sequence of separate parts. They are able to recognize the author behind the text, showing an understanding of literary devices and voice. They also understand the author's intent and can link important ideas made by the author.

Students at this level are proficient in a broader range of reading materials than those at the lower levels. They are particularly adept in answering multi-part questions. They are able to generate full, well-developed arguments and explanations. They justify their positions with appropriate supporting evidence from the passage. The students use information to hypothesize and generalize. Their inferences are creative as well as appropriate and clear. Their responses are elaborate and coherent.

TEACHER PROFESSIONAL DEVELOPMENT DATA

Table 5
Expeditionary Learning Teacher Survey:
Respondents' Involvement in Selected Activities[a]

Professional Development	Participants	
	N[b] (N=173)	%
School-based planning meeting	135	78.0
Mini-sabbatical	134	77.5
School-based team building	105	60.7
One-day Expeditionary Learning orientation	100	57.8
Summer Institute	94	54.3
City Exploration Day[c]	79	45.7
Pilot expedition with students	63	36.4
Outward Bound/Wilderness Expedition	40	23.1
Project Adventure Adventures in the Classroom	38	22.0
Project Adventure Adventures-based Counseling	16	9.2
Facing History/Facing Ourselves	12	6.9
Education for Social Responsibility, Power of Numbers	8	4.6

NOTES: [a]EL/OB Interim Report, February 1994.
[b]The N represented is the highest number of respondents answering any item shown in this table.
[c]Response may duplicate responses for One-Day Expeditionary Learning Orientation for Dubuque teachers.

Table 6

Expeditionary Learning Teacher Survey: Respondents' Ratings of the Usefulness of Selected Staff Development Activities[a]

Staff Development Activities	Participants Rating the Activity as Useful	
	N[b] (N=146)	%
Designing an expedition (curriculum development)		
Very useful	34	23
Useful	91	62
Carrying out an expedition with other teachers		
Very useful	38	26
Useful	56	38
Finding out about community resources		
Very useful	27	18
Useful	68	47
Learning about approaches to curriculum development from groups such as Project Adventure or Educators for Social Responsibility		
Very useful	38	26
Useful	53	36
Hearing about other groups' ideas		
Very useful	23	16
Useful	66	45
Team building activities with teachers from my school		
Very useful	26	18
Useful	58	40
Getting to know and work with staff from other schools		
Very useful	20	14
Useful	61	42
Presenting ideas to a larger group (other than your school) and receiving feedback		
Very useful	17	12
Useful	36	25

NOTES: [a]EL/OB Interim Report, February 1994.

[b]The N represented is the highest number of respondents answering any item shown in this table.

B. DESIGN-BASED SCHOOL REFORM

The New American Schools Development Corporation supports nine Design Teams who have developed and are implementing comprehensive designs for high-performance schools. The nine designs represent differing philosophies and varied, research-based education practices. In their 1991 solicitation of reform models, NASDC specified that designs were to integrate all elements of a school's life. They were to address whole schools--not just a single grade or program within a school. Designs were to be benchmarked against demanding goals and achievement standards. The designs were to be for all students, not merely those most likely to succeed.

NASDC asked RAND to examine the development, initiation and implementation of the designs as work progressed through school year 1994/95. RAND observed that Design Teams and schools made rapid progress. Analysts proposed that progress was hastened by the designs' broad visions of reform and school change; by the fact that transformations involved entire schools, rather than smaller programs or design features; and through the provision of substantial technical assistance and professional development.

RAND's document reviews, discussions, interviews and focus groups provided information about progress and challenges for these designs. RAND's analyses addressed eight program elements. These elements simultaneously describe the school as an organization and schooling as a process; they provide a structure for examining school-wide change. RAND focused on elements largely common to the NASDC designs, including: standards and assessment, curriculum and instruction, teacher professional development, technology use, school organization and governance, family and community services, public engagement, and school/system/designer partnering. These components are evident in other design-based reforms, including those of the Coalition of Essential Schools, the Accelerated Schools Project, the Comer School Development Program, and Success for All. The program elements are:

School Reform Elements

Standards and Assessment--Standards statements typically (1) outline the things students should know and be able to do and (2) lay out expected achievement levels. Assessments are the means by which student attainment is judged.

Curriculum and Instruction--Curriculum outlines generally follow from standards statements and describe the knowledge and skills to be mastered; curriculum materials typically lay out the sequence in which learning occurs. Instruction is the means by which learning takes place.

School Organization--The means by which (1) students are grouped in classes and (2) programs and staff are grouped and accorded responsibility for the student program.

Teacher Professional Development--Professional development opportunities are the formal and informal faculty offerings designed to extend and support teachers' knowledge and practice.

Technology Use--The ways that technology and information systems are used in instruction and in support of the program generally.

School Governance--The means by which actors in the educational system (students, parents, teachers, administrators, school board members, district staff, state-level staff, etc.) are organized, make decisions about and manage the school.

Family and Community Services--The social and health services provided through the program for students, families and communities.

Public Engagement--The means by which stakeholders are invited to become knowledgeable about and participate in the program; these include volunteer and teaming opportunities for parents, community members, businesses and non-profits.

School/System/Designer Partnering--The means by which school, jurisdiction, and design representatives initiate and maintain partnerships in developing and strengthening the program.

C. OBJECTIVES STATEMENT WORKSHEET

- **Standards and Assessment**

  Objective 1:

  Objective 2:

  Objective 3:

- **Curriculum and Instruction**

  Objective 4:

  Objective 5:

  Objective 6:

- **School Organization**

  Objective 7:

  Objective 8:

  Objective 9:

- **Teacher Professional Development**

  Objective 10:

  Objective 11:

  Objective 12:

- **Technology Use**

  Objective 13:

  Objective 14:

  Objective 15:

- **School Governance**

  Objective 16:

  Objective 17:

  Objective 18:

- **Family and Community Services**

  Objective 19:

Objective 20:

Objective 21:

- **Public Engagement**

Objective 22:

Objective 23:

Objective 24:

- **School/System/Designer Partnering**

Objective 25:

Objective 26:

Objective 27:

- **Comprehensive Student Performance and School Improvement Goals**

Objective 28:

Objective 29:

Objective 30:

D. COMPREHENSIVE OUTCOMES WORKSHEET

STUDENT PERFORMANCE DATA

		1994/95	1995/96	1996/97	1997/98
ATTENDANCE RATES					
PROMOTION RATES					
GRADUATION RATES					
DROP-OUT RATES					
DISCIPLINARY REFERRALS/SUSPENSIONS/ EXPULSIONS					
PERFORMANCE ASSESSMENT DATA (describe assessment, rubrics, scale)	Grade ____				
	Grade ____				
	Grade ____				

SCHOOL PERFORMANCE DATA

TEACHER ATTENDANCE RATES					
TEACHER RETENTION RATES					
PARENT/TEACHER CONFERENCE PARTICIPATION RATES					
PARENT VOLUNTEER RATES					
FAMILY/COMMUNITY SERVICE RATES					
COMMUNITY VOLUNTEER RATES					
BUSINESS/NONPROFIT PARTICIPATION					

Example Definitions for Comprehensive Outcome Data

Student Performance Data

1. Attendance rates--percent of students present on an average school day from 9/30 through 6/1 (or during the official school year).

2. Promotion rates--percent of students advanced to a higher grade or instructional level at the conclusion of the school year.

3. Graduation rates--number and percent of students completing minimum requirements for a high school diploma.

4. Drop-out rates (for middle and high schools)--number and percent of high school students withdrawing from high school (without transferring into another academic program) between 9/30 and 6/1 (or prior to completion of the high school program); readmitted students dropping out on a second or subsequent occasion should be counted once.

5. Disciplinary referrals/suspensions/expulsions--number and percent of students suspended, expelled or officially referred (beyond the classroom level) for disciplinary action.

6. Performance assessment data (if available from an ongoing program)--summary information from performance-based assessments, including numbers and percents of students scoring at each standard or scale level, copies of the standard or scale descriptions/rubrics, and sample student work.

School Performance Data

7. Teacher attendance rates--number and percent of instructional staff present in school or in an approved teacher professional development session on an average school day during the official school year.

8. Teacher retention (in the school) rates--number and percent of instructional staff retained in the school from each of (1) the beginning to end of the official school year and (2) one academic year to the next.

9. Parent/teacher conference participation rates--percent of students for whom a parent or guardian attended official conferences.

10. Parent volunteer rates--numbers of parents (and percents of families) volunteering and participating in the instructional program, in administrative support of the program, in fundraising actives, and in extracurricular activities.

11. Family and community service utilization rates--by service category and overall, the numbers of (1) school families and (2) community members using social and health support services provided by the program.

12. Community member volunteer rates--numbers of community members (not school families) volunteering in the instructional program, in administrative support of the program, in fundraising activities, and in extracurricular activities.

13. Numbers of businesses/nonprofits participating in the program--numbers of businesses partnering with or participating in the school in support of the instructional program and in administrative and financial support.

E. PROGRESS INDICATOR/BENCHMARK WORKSHEET

OBJECTIVES	INDICATORS	SPRING 1996 BENCHMARKS	SPRING 1997 BENCHMARKS	SPRING 1999 BENCHMARKS
• **Standards and Assessment**				
Objective 1:				
Objective 2:				
Objective 3:				
• **Curriculum and Instruction**				
Objective 4:				
Objective 5:				
Objective 6:				
• **School Organization**				
Objective 7:				
Objective 8:				
Objective 9:				
• **Teacher Professional Development**				
Objective 10:				
Objective 11:				
Objective 12:				

• **Technology Use**				
Objective 13:				
Objective 14:				
Objective 15:				
• **School Governance**				
Objective 16:				
Objective 17:				
Objective 18:				
• **Family and Community Services**				
Objective 19:				
Objective 20:				
Objective 21:				
• **Public Engagement**				
Objective 22:				
Objective 23:				
Objective 24:				
• **School/System/Designer Partnering**				
Objective 25:				

Objective 26:				
Objective 27:				
• **Comprehensive Student Performance and School Improvement Goals**				
Objective 28:				
Objective 29:				
Objective 30:				

F. DATA COLLECTION WORKSHEET

GOALS	INDICATORS	DATA COLLECTION METHOD	DATA SOURCE	DATA COLLECTION WINDOW
• **Standards and Assessment**				
Objective 1:				
Objective 2:				
Objective 3:				
• **Curriculum and Instruction**				
Objective 4:				
Objective 5:				
Objective 6:				
• **School Organization**				
Objective 7:				
Objective 8:				
Objective 9:				
• **Teacher Professional Development**				
Objective 10:				
Objective 11:				
Objective 12:				

• **Technology Use**				
Objective 13:				
Objective 14:				
Objective 15:				
• **School Governance**				
Objective 16:				
Objective 17:				
Objective 18:				
• **Family and Community Services**				
Objective 19:				
Objective 20:				
Objective 21:				
• **Public Engagement**				
Objective 22:				
Objective 23:				
Objective 24:				
• **School/System/Designer Partnering**				
Objective 25:				

Objective 26:				
Objective 27:				
• **Comprehensive Student Performance and School Improvement Goals**				
Objective 28:				
Objective 29:				
Objective 30:				

G. IMPLEMENTATION OBSERVABLES CHECKLIST

Standards and Assessment

- ☐ Standards statements
- ☐ Schedule of training and materials given to teachers to help them understand new standards
- ☐ List of names of members of local standards committees ad example minutes of meetings copies of materials given to students, parents, and/or community members explaining new standards
- ☐ Available documentation on the links between standards and curriculum, and standards and assessments
- ☐ Schedule of training and materials given to teachers to do portfolio assessments and other new assessments
- ☐ Samples of portfolios assessments
- ☐ Samples of alternative assessment tasks not part of portfolios
- ☐ Statements of examples of scoring criteria for portfolios and non-portfolio assessments
- ☐ Documentation of changes in student achievement
- ☐ Documentation on the links between curriculum and assessments

Curriculum and Instruction

- ☐ Examples of lesson plans, units of study, etc.
- ☐ Number of lesson plans or units of study developed versus number remaining to be completed to cover full curriculum by grade level
- ☐ Sequence across grades of new curriculum (schedule for a student)
- ☐ Other changes to courses, course content, and course sequencing
- ☐ Documentation of connections to community in curriculum areas
- ☐ Description of quality control mechanisms in place for newly developed curriculum. For example, teacher peer review, review by design team, etc. And, evidence of subsequent changes or dropped units (for example, five units dropped after peer review)

- ☐ Schedule of training and materials for teachers for new curriculum
- ☐ Schedule for completion of all required curriculum units
- ☐ Schedule for adoption of instructional strategies
- ☐ Schedule and materials provided teachers for new instructional strategies
- ☐ List of places teachers use for community as classroom
- ☐ List of when the community has come into the classroom - speakers, performers
- ☐ Example of schedule that allows for students' individual choices

School Organization

- ☐ Teachers' school day schedule demonstrating time for teaming, curriculum writing, paperwork, etc.
- ☐ Documentation of new/changed staffing patterns including master teachers, apprentices, aides, volunteers, facilitators
- ☐ List of new grade combinations, teacher team combinations, etc., and when they went into effect
- ☐ Relative number of classes covered by these new combinations versus classes that have not converted
- ☐ Description of student placement procedures

Teacher Professional Development

- ☐ Schedule of teacher professional development meetings
- ☐ Workshop materials
- ☐ Workshop attendees roster
- ☐ School visit agendas
- ☐ Documentation of ongoing teacher collaboration

Technology Use

- ☐ List and location of newly purchased, design related equipment (classroom, labs, principal's office)
- ☐ Schedule for purchasing more design related equipment
- ☐ Schedule and materials for training
- ☐ List of software programs/packages used

- ☐ Examples of curriculum units incorporating technology

School Governance

- ☐ List of names of members of various committees required by design
- ☐ Schedule and materials for training in new governance roles
- ☐ Schedule of committee meetings and examples of minutes from meetings
- ☐ Significant products of the committees, such as new schedules for courses, standards for exemplary student products, new standards, plans for technology, school improvement plans
- ☐ Newly developed rules, regulations, master contracts, site-based management plans, waivers, and district-school agreements about school level control over budget, hiring, firing, evaluation, or mission
- ☐ List of incentives to encourage new behaviors
- ☐ Master contract changes to accommodate these roles
- ☐ Grievances filed concerning new roles
- ☐ Hiring/layoffs due to design implementation
- ☐ Description of new roles for administrators

Family and Community Services

- ☐ Name of social services coordinator for school
- ☐ Schedule for different activities
- ☐ Indicators of utilization of or participation in these services

Public Engagement

- ☐ Schedule of public meetings
- ☐ Materials explaining reform program for parent and community audiences
- ☐ Materials explaining reform for education stakeholder audiences
- ☐ Samples of newspaper articles and newsletters for lay consumption
- ☐ Community volunteer roster
- ☐ Business/nonprofit participation agreements

School/System/Design Partnering

- ☐ Statements of partnership objectives
- ☐ Schedules for and minutes from partner meetings
- ☐ Products jointly developed by partners

H. CLASSROOM OBSERVATION GUIDE

CLASSROOM PRACTICES: A GUIDE FOR ATLAS OBSERVATIONS[1]

1. Are students spending a good deal of time talking with one another and the teacher: sharing, questioning, discussing, debating?

2. Are students regularly involved in efforts to demonstrate their understandings within and beyond their classroom: e.g. communicating knowledge to others; advocating solutions to problems; providing assistance to others; creating performances or products with utilitarian or aesthetic value?

3. Do students have regular opportunities to work cooperatively? To reflect on their work and share it with others? Do students solicit and welcome contributions from others?

4. Are the materials that are employed thought-provoking? Do they stimulate real-life work and sharing among the students?

5. Do teachers and students regularly work on problems or issues that they see as connected to their personal experiences or contemporary concerns?

6. Do the products students are being asked to produce require them to think critically or creatively; to conduct research; to examine perspectives; to analyze, evaluate, and to come to conclusions; to communicate thoughtfully; to create or design original works; to conduct real-life tasks?

7. Does the teacher appear to know each student well? Does s/he know students' strengths and needs? Does s/he appear to tailor her/his interactions and requests accordingly?

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[1]ATLAS, 1994.

8. Is the classroom atmosphere welcoming, warm. and energized? Are students working: Are they respectful of one another? Are students' works posted? Are only exceptional works posted?

9. Does the teacher move about the room and make close contact with each student? Does s/he actively seek to engage each student in some fashion?

10. Does the teacher clearly communicate his/her expectations and are they challenging (as represented through the work that's required of students)?

11. Does the teacher regularly collect a variety of data, through portfolios, classroom exhibitions, tests, quizzes, homework, and other products to monitor students' performance and progress?

12. Does the teacher check students' performance on products, hold students accountable for quality work, clearly communicate results to students, celebrate success, and motivate students to persist in the face of occasional setbacks?

13. How much time does a teacher spend:

- presenting factual information,
- discussing factual information with students,
- posing challenging questions about information (and encouraging students to do the same), and allowing students to make meaning of the information through the pursuit and discussion of these questions?

14. Does the teacher devote significant time to teaching and assessing reading, writing, speaking, research, and other content-specific basic skills?

15. Does the teacher allow students to take optimal and appropriate responsibility for their own learning, given their particular developmental level?

16. When engaged in questioning activities, does the teacher allow students sufficient time to think about and answer the questions? Are

students expected to answer the questions in complete sentences and with depth? Does the teacher probe for greater detail, clarity, or thoughtfulness when answers are brief, sketchy, or superficial? Does the sequence of questions (to one more students) build coherently on participants' ideas?

I. REFORM SURVEY INSTRUMENTS

Modern Red Schoolhouse
Teacher Survey
1995

Instructions

This is a survey for teachers participating in the Modern Red Schoolhouse initiative. It is intended to help us gauge the degree to which you think you understand various elements of the design and the degree to which you think the design has affected student behavior and learning. We realize that, for instance, with changes in student learning, it is hard to know exactly which program elements are having the biggest effect on students. Your best judgment is all that we can ask.

Keep in mind that your honest assessment will be the most helpful to our work. Knowing the strengths and weaknesses of any effort can only make it better. Your comments will be kept strictly confidential. All reporting within Hudson will be done only at a school level. Results distributed to the public will not identify the name of any school with any responses from this survey.

Please read through the instructions below and then proceed to answer the questions in a way that best describes your response to each question.

1. Write your name on the cover sheet and detach it. Your site coordinator will collect it prior to the time you begin the survey.

2. Please complete the survey during one sitting if possible. We estimate that it will take approximately a half hour.

3. All of the questions require one response only. Please select only one of the many response choices given.

4. When you have completed the survey, please return it to your site coordinator by no later than Thursday, March 9th.

We indeed thank you for your assistance and cooperation!

TEACHER SURVEY

Please indicate your responses by marking your answers directly on this questionnaire.

Project Effectiveness

Please provide your best estimate of how the Modern Red Schoolhouse design has improved your school in the following areas: (Circle either "3, 2 or 1").

		A lot	Some	None
1.	Teachers use of technology in their classrooms	3	2	1
2.	Teachers' roles in making school decisions	3	2	1
3.	School autonomy	3	2	1
4.	Leadership skills	3	2	1
5.	Parent involvement	3	2	1
6.	Community involvement	3	2	1
7.	Students' engagement with learning	3	2	1
8.	Achievement levels of all students	3	2	1

*Please indicate **how well you understand** each of the following Modern Red Schoolhouse concepts, very well, well, somewhat, or not well. (Circle the number that best describes your judgment of how well you understand each concept.)*

		5 = Very well	4 = Well	3 = Somewhat	2 = Not well	1 = Does not apply to my school.
9.	MRSH standards	5	4	3	2	1
10.	Core Knowledge curriculum.	5	4	3	2	1
11.	Work force skills	5	4	3	2	1
12.	Character development through establishing core virtues with community.	5	4	3	2	1
13.	School autonomy	5	4	3	2	1
14.	Developing a staffing structure that matches needs of students	5	4	3	2	1
15.	Continuous progress to all students	5	4	3	2	1
16.	The Individual Education Compact (IEC)	5	4	3	2	1
17.	Technology and information networks	5	4	3	2	1
18.	Primary, Intermediate, and Upper divisions	5	4	3	2	1
19.	Parental choice	5	4	3	2	1
20.	Hudson Units	5	4	3	2	1
21.	Watershed assessments	5	4	3	2	1
22.	Student Reports	5	4	3	2	1
23.	School Reports	5	4	3	2	1
24.	Pre-school consortium	5	4	3	2	1
25.	Parent involvement	5	4	3	2	1
26.	Parental Information Centers	5	4	3	2	1
27.	Community support services for students	5	4	3	2	1

Please indicate the extent to which each of the following Modern Red Schoolhouse concepts is observable at your school. (Circle the number that best describes the level at which each listed concept is in place at your school.)

5 = implemented fully
4 = implemented to a large degree
3 = implemented to a moderate degree
2 = minimally implemented
1 = has not been implemented

		5 = fully.	4 = to a large degree	3 = moderate degree	2 = minimally	1 = not implemented
28.	MRSH standards	5	4	3	2	1
29.	Core Knowledge curriculum	5	4	3	2	1
30.	Work force skills	5	4	3	2	1
31.	Character development	5	4	3	2	1
32.	School autonomy	5	4	3	2	1
33.	A staffing structure that matches needs of students	5	4	3	2	1
34.	Continuous progress to all students	5	4	3	2	1
35.	The Individual Education Compact (IEC).	5	4	3	2	1
36.	Performance grouping	5	4	3	2	1
37.	Multi-age homerooms	5	4	3	2	1
38.	Technology and information networks	5	4	3	2	1
39.	Primary, Intermediate, and Upper divisions	5	4	3	2	1
40.	Parental choice to attend this school	5	4	3	2	1
41.	Hudson Units	5	4	3	2	1
42.	Watershed assessments	5	4	3	2	1
43.	Student Reports	5	4	3	2	1
44.	School Reports	5	4	3	2	1
45.	Pre-school consortium	5	4	3	2	1
46.	Parent involvement	5	4	3	2	1
47.	Parental Information Centers	5	4	3	2	1
48.	Community support services for students	5	4	3	2	1

Please provide your best estimate of the degree to which the academic achievement of your students has been improved by these Modern Red Schoolhouse elements.

5 = Very Positive effects.
4 = Some Positive effects.
3 = No effects.
2 = Some Negative effects.
1 = Very Negative effects.
0 = Not implemented at this time

		5 = Very Positive effects.	4 = Some Positive effects.	3 = No effects.	2 = Some Negative effects.	1 = Very Negative effects.	0 = Not implemented.
49.	MRSH standards	5	4	3	2	1	0
50.	Core Knowledge curriculum	5	4	3	2	1	0
51.	Work force skills	5	4	3	2	1	0
52.	Character development	5	4	3	2	1	0
53.	School autonomy	5	4	3	2	1	0
54.	A staffing structure that matches needs of students	5	4	3	2	1	0
55.	Continuous progress to all students	5	4	3	2	1	0
56.	The Individual Education Compact (IEC).	5	4	3	2	1	0
57.	Performance grouping	5	4	3	2	1	0
58.	Multi-age homerooms	5	4	3	2	1	0
59.	Technology and information networks	5	4	3	2	1	0
60.	Primary, Intermediate, and Upper divisions	5	4	3	2	1	0
61.	Parental choice to attend this school	5	4	3	2	1	0
62.	Hudson Units	5	4	3	2	1	0
63.	Watershed assessments	5	4	3	2	1	0
64.	Student Reports	5	4	3	2	1	0
65.	School Reports	5	4	3	2	1	0
66.	Pre-school consortium	5	4	3	2	1	0
67.	Parent involvement	5	4	3	2	1	0
68.	Parental Information Centers	5	4	3	2	1	0
69.	Community support services for students	5	4	3	2	1	0

How often do some students demonstrate the following behaviors in your classroom: everyday, several times a week, several times a month, or never?

		3 = Everyday	2 = Several times a week	1 = Several times a month	0 = Never
70.	Students bring items from home which support school studies	3	2	1	0
71.	Students finish work and have nothing to do	3	2	1	0
72.	Students work in small groups to solve complex problems	3	2	1	0
73.	Students talk about what they learn in class outside of the classroom	3	2	1	0
74.	Students are frustrated and confused over assignments	3	2	1	0
75.	Students complete work and don't know what to do next	3	2	1	0

About how often do some students in your classroom do the following: everyday, once or twice a week, once a month, hardly ever, or never?

		5 = Every day	4 = Once or twice a week	3 = Once a month	2 = Hardly ever	1 = Never
76.	help other students having difficulty with an assignment	5	4	3	2	1
77.	work in performance level groups	5	4	3	2	1
78.	skip class	5	4	3	2	1
79.	misbehave and disrupt others from learning	5	4	3	2	1
80.	work one-on-one with you	5	4	3	2	1
81.	work with another student having a different skill-level in a particular subject	5	4	3	2	1
82.	work alone	5	4	3	2	1
83.	read books that are not assigned	5	4	3	2	1
84.	obtain assistance from an adult volunteer or other staff member	5	4	3	2	1
85.	decide how to present what it is they have learned.	5	4	3	2	1
86.	use computers to support academic activities.	5	4	3	2	1
87.	use the school library to find resources for projects.	5	4	3	2	1

School Climate

Following are a number of statements that might be made about your school. Please indicate your level of agreement with the statement by circling a number between 5 (Strongly agree) and 1 (Strongly disagree) on the scale located to the right.

		Strongly Agree				Strongly Disagree
88.	The school has a written mission statement that is shared by all stakeholders.	5	4	3	2	1
89.	This school's mission statement makes direct reference to teaching and learning for all.	5	4	3	2	1
90.	What must be learned, and who is accountable, is clear at this school.	5	4	3	2	1
91.	The climate of the school reflects the belief that all students can succeed.	5	4	3	2	1
92.	School goals and objectives are clearly stated in a way that provides direction	5	4	3	2	1
93.	School goals and objectives are achievable.	5	4	3	2	1
94.	School goals and objectives are translated into action plans by staff.	5	4	3	2	1
95.	At this school we are trying to build a community of shared values and beliefs.	5	4	3	2	1
96.	This school fosters a sense of ownership and leadership among staff by involving them in decisions about the school and school programs.	5	4	3	2	1
97.	I am satisfied with the level and nature of my involvement in decision-making.	5	4	3	2	1
98.	In this school I am encouraged to experiment with my teaching.	5	4	3	2	1

Following are a number of statements that might be made about your school. Please indicate your level of agreement with the statement by circling a number between 5 (Strongly agree) and 1 (Strongly disagree) on the scale located to the right.

		Strongly Agree				Strongly Disagree
99.	Teachers at this school have high expectations for their own performance.	5	4	3	2	1
100.	At this school there are a broad array of teaching strategies being implemented.	5	4	3	2	1
101.	Staff morale is high—administrators, teachers, and other school staff exhibit pride in the school.	5	4	3	2	1
102.	Student morale is high—students exhibit pride in the school.	5	4	3	2	1
103.	We have the tools to appropriately monitor student progress at this school.	5	4	3	2	1
104.	Student progress is best measured through the use of norm-referenced tests.	5	4	3	2	1
105.	Results of measurements of student progress are appropriately used to improve individual student performance and guide instruction.	5	4	3	2	1
106.	This school has good alignment between the written, taught and tested curriculum.	5	4	3	2	1
107.	This school is making good use of technology by both teachers and students to monitor learning progress.	5	4	3	2	1
108.	This school is making an appropriate move toward more authentic forms of assessment.	5	4	3	2	1

Following are a number of statements that might be made about your school. Please indicate your level of agreement with the statement by circling a number between 5 (Strongly agree) and 1 (Strongly disagree) on the scale located to the right.

		Strongly Agree				Strongly Disagree
109.	The atmosphere of this school is professional.	5	4	3	2	1
110.	The environment of this school is conducive to learning.	5	4	3	2	1
111.	Students at this school work well together.	5	4	3	2	1
112.	Teachers at this school express a good deal of collegiality among their peers.	5	4	3	2	1
113.	Leadership abilities are nurtured at this school for both teachers and students.	5	4	3	2	1
114.	School and classroom environments are safe for people and property.	5	4	3	2	1
115.	Staff accept and take responsibility for school rules and standards.	5	4	3	2	1
116.	Students accept and take responsibility for school rules and standards.	5	4	3	2	1
117.	I have a sense of satisfaction in my professional role and feel I have a positive impact on students.	5	4	3	2	1
118.	Staff members are recognized for a job well done.	5	4	3	2	1
119.	Parents understand and support the mission of this school.	5	4	3	2	1
120.	Parents volunteer as much as they need to at this school.	5	4	3	2	1

Following are a number of statements that might be made about your school. Please indicate your level of agreement with the statement by circling a number between 5 (Strongly agree) and 1 (Strongly disagree) on the scale located to the right.

		Strongly Agree				Strongly Disagree
121.	This school is working adequately on building authentic partnerships with parents on issues pertaining to school governance.	5	4	3	2	1
122.	This school is adequately working on building authentic partnerships with parents on issues pertaining to student learning.	5	4	3	2	1
123.	This school offers parents training in how to support their children's learning.	5	4	3	2	1

In comparing student behavior in your classroom this academic year with the previous year, what is your best estimate of the following:

124. Student attendance is:

❑ better ❑ worse ❑ the same

125. Student interest in learning is:

❑ better ❑ worse ❑ the same

126. Student misbehavior is:

❑ better ❑ worse ❑ the same

127. *In general, how would you now characterize your support of the Modern Red Schoolhouse program in your school? Please circle one response.*

Strong Support	Moderate Support	Slight Support	Slight Opposition	Moderate Opposition	Strong Opposition
6	5	4	3	2	1

Below are questions that are intended to gather information about teachers as a group. Please complete the following information about you. (Circle the letter that applies).

128. **Sex:** (A) Male (B) Female

129. **Ethnicity** (A) Caucasian (B) Latino (C) Native American
(D) Black (E) Asian (F) Other

130. **How many years including this one have you participated in the *Modern Red Schoolhouse* project?**

A. Since our school considered joining, 1992.
B. Fall, 1993.
C. Fall, 1994.
D. Other, please specify:_____

131. **Please indicate whether or not you participate in any state or district performance pay or incentive wage program.**

A. I do participate in a performance pay or incentive wage program.
The name of the program is: _____.

B. I do not participate in a performance pay or incentive wage program.

132. **How many years of *full-time* teaching experience do you have?**

A. More than 20 years.

B. 15 - 19 years.

C. 10 - 14 years.

D. 5 - 9 years.

E. 1 - 4 years.

133. How many years have you taught bilingual/LEP/bicultural students (**including this year**)? _____ years or,

❑ I have never taught bilingual/LEP/bicultural students.

Academic/Professional Background

134. What is the highest degree you have received?

(A) Bachelor's + teaching credential
(B) Bachelor's + some units beyond credential
(C) Master's
(D) Master's + units beyond
(E) Doctorate
(F) Other (specify)_____

135. Please indicate your certification and the subjects, grade levels, and specialties for which you are qualified: (Check all that apply)

A. State Department of Education. Please name the states: _____
_____
_____

B. National Board for Professional Teaching Standards. Please name the subjects: _____

C. Other, please specify):_____
_____

D. I am not certified by any legal entity as of the date of this survey.

136. Please indicate which teaching credentials you have and specify the content area of specialization. ***(Circle all that apply.)***

(A) General Elementary
(B) General Secondary
(C) Special Emergency
(D) Multiple Subject
(E) Single Subjects
(F) Bilingual
(G) Early Childhood
(H) Special Education
(I) Other: _____.

If you have any other comments about the positive or negative effects of the Modern Red Schoolhouse program in your school, please provide them in space provided below.

THANK YOU FOR YOUR COOPERATION IN COMPLETING THIS SURVEY.

Los Angeles
Learning Center
Administrator Survey
1994

Name _____
First Last

Please Print Clearly

ADMINSTRATOR QUESTIONAIRE
1994

INSTRUCTIONS

Dear Administrator:

Your response to this survey will shed light on the many changes that are taking place at your school as part of the Los Angeles Learning Center (LALC), funded by the New American Schools Development Corporation (NASDC). The survey is part of a two-year evaluation of the overall LALC program for NASDC. It is being conducted by the Center for the Study of Evaluation at UCLA.

The purpose of the evaluation is to discover how the LALC design is implemented at your school and what are the effects on teachers, students and the school as a whole.

In the future, it will be very interesting to look back and see what changes and progress have occurred. When these data are combined with data from other NASDC schools across the country, the results will help us all understand the value of what you are being asked to do. In the interim, the LALC Management Team may provide your site-based management council with feedback from the program evaluation that might be of value to your school.

We need you to be candid with us. The information is confidential and no one's name will be used. Your participation is voluntary, and you may decline to answer any question. Feel free to add additional comments to ehelp us understand and shape this project.

Many thanks for your cooperation!

If you have any questions, please call Pam Aschbacher at CSE (310/206-1532).

ID#_____
CSE will complete

Los Angeles Learning Center
Principal and Assistant Principal Survey
1994

1. How many years have you been a school administrator prior to this year? (public or private schools) _____

2. How many years have you been an administrator at this school prior to this year?

3. Sex: ❑ Female ❑ Male

4. Do you consider yourself bilingual? (in Spanish and English)

   ❑ Yes with bilingual credential

   ❑ Yes, without credential

   ❑ No

5. List any professional networks or organizations to which you currently belong (such as Association for Supervision and Curriculum Development, etc.):

6. How clear and well described are these LALC concepts so that they can be implemented at Elizabeth Street School?
(circle a number for each concept listed)

5=very clear and well described
4=clear and well described
3=somewhat described
2=unclear and not well described
1=very unclear and not well described

a.	"Moving Diamond" system of child advocacy	1	2	3	4	5
b.	Multi-age clustering of students	1	2	3	4	5
c.	Collaborative planning by teacher teams	1	2	3	4	5
d.	Thematic, interdisciplinary curriculum	1	2	3	4	5
e.	Instruction based on current theories of learning and multiple intelligences	1	2	3	4	5
f.	Community as integrated resource	1	2	3	4	5
g.	School-based health and social services	1	2	3	4	5
h.	Technology as integrated classroom resources	1	2	3	4	5
i.	Teachers as continual learners	1	2	3	4	5
j.	Teachers sharing in school decision-making and governance	1	2	3	4	5

7. How is your job different under the LALC program?

8. In general, how would you characterize your attitude toward the LALC program at your school? (Circle one.)

strong opposition	moderate opposition	slight opposition	slight support	moderate support	strong support
1	2	3	4	5	6

9. What aspects of the LALC program do you feel most enthusiastic about?

10. What aspects do you feel most uncomfortable or uncertain about?

11. What influence, if any, has the LALC Program had to date on these aspects of your job?

7 = big increase
6 = moderate increase
5 = small increase
4 = no change
3 = small decrease
2 = moderate decrease
1 = big decrease
0 = don't know

a. Exchange of ideas with colleagues and staff at the school	0	1	2	3	4	5	6	7
b. Exchange of ideas with colleagues outside the school	0	1	2	3	4	5	6	7
c. Opportunity to use my special strengths, interests and expertise	0	1	2	3	4	5	6	7
d. Enthusiasm for duties as an administrator	0	1	2	3	4	5	6	7

11. (con't)

e.	Pride in my profession	0	1	2	3	4	5	6	7
f.	Interest in working with parents	0	1	2	3	4	5	6	7
g.	Role in school decision-making	0	1	2	3	4	5	6	7
h.	Using technology in my work	0	1	2	3	4	5	6	7
i.	Interest in becoming (more) fluent in a second language	0	1	2	3	4	5	6	7
j.	Understanding how people learn and change	0	1	2	3	4	5	6	7
k.	Understanding what motivates people to learn and change	0	1	2	3	4	5	6	7
l.	Involvement in students' health, safety, and psychological well-being	0	1	2	3	4	5	6	7
m.	Effort it takes to do my job	0	1	2	3	4	5	6	7
n.	Time spent outside school hours that relate to duties as an administrator	0	1	2	3	4	5	6	7
o.	Access to interesting people and opportunities	0	1	2	3	4	5	6	7
p.	Other: _____	0	1	2	3	4	5	6	7

12. Indicate the extent to which you agree/disagree with the following:

		strongly disagree					strongly agree
a.	Teachers are involved in making decisions that affect them	1	2	3	4	5	6
b.	The school administration's behavior toward teachers and others is supportive and encouraging	1	2	3	4	5	6
c.	I feel comfortable voicing my concerns in this school	1	2	3	4	5	6
d.	I have influence on the decisions that directly affect me	1	2	3	4	5	6
e.	The Lead Teacher position is helpful	1	2	3	4	5	6
f.	I am certain I am making a difference in the lives of the students	1	2	3	4	5	6
g.	Compared with other administrators in this district, my professional workload is fair and reasonable	1	2	3	4	5	6
h.	This school makes an effort to reach out to the community	1	2	3	4	5	6
i.	My work in this school is evaluated fairly	1	2	3	4	5	6
j.	Most of the staff share my beliefs and values about the central mission of the school	1	2	3	4	5	6
k.	Goals and priorities for the school are clear	1	2	3	4	5	6
l.	I feel accepted and respected as a colleague by most staff members	1	2	3	4	5	6

12. (Con't)

m.	There is a great deal of cooperative effort among staff members	1	2	3	4	5	6
n.	Students here want to be high achievers	1	2	3	4	5	6
o.	Students here look out for each other	1	2	3	4	5	6
p.	The LALC program at this school will be good for our students	1	2	3	4	5	6
q.	Administrators in this school are continually learning and seeking new ideas.	1	2	3	4	5	6
r.	We pay attention to students' feelings	1	2	3	4	5	6
s.	The parents really appreciate what we are trying to do at this school	1	2	3	4	5	6
t.	Parents support their children's learning	1	2	3	4	5	6
u.	There is good communication at the school	1	2	3	4	5	6
v.	The LALC program is asking us to make too many changes at once	1	2	3	4	5	6
w.	Students here are capable of high achievement	1	2	3	4	5	6
x.	The LALC program is worth all the time and effort	1	2	3	4	5	6

13a. What kind of effects, if any, has the LALC program had on students so far?

13b. How do you know?

14a. What effects has the program had on teachers so far?

14b. How do you know?

15a. What effects has the program had on others so far?

15b. How do you know?

16. What are the biggest barriers you face implementing the LALC program?

17. What kinds of support or resources are or would be most helpful to you?

18. What should we do differently at the second NASDC site?

19. Please tell us anything more you'd like us to know about the LALC program at your school.

MANY, MANY THANKS FOR COMPLETING THIS SURVEY!!

School _____

Grade Levels Served _____

Full Time / Part Time _____

Date _____

Code Number _____

Roots and Wings School Staff Survey

Please indicate your agreement or disagreement with the following statements about the Roots and Wings (R&W) components. Rate the ***actual value*** of each component to your school. If you are unfamiliar with the component indicated in an item, leave that item blank.

ACTUAL VALUE

	Very Valuable **4**	Valuable **3**	Some-what Valuable **2**	Not Valuable **1**	Not Familiar With Component **NF**
1. The Instructional Philosophy of Roots and Wings	4	3	2	1	NF
2. The Birth-to-Age-Three Components of the Program	4	3	2	1	NF
3. The Kindergarten Program (STaR/Thematic Units)	4	3	2	1	NF
4. The Reading Roots Program (Grade One)	4	3	2	1	NF
5. The Reading Wings Program (Grades Two-Five)	4	3	2	1	NF
6. The MathWings Program	4	3	2	1	NF
7. The WorldLab Program	4	3	2	1	NF

More →

ACTUAL VALUE

	Very Valuable 4	Valuable 3	Some-what Valuable 2	Not Valuable 1	Not Familiar With Component NF
8. The Cooperative Learning Strategies	4	3	2	1	NF
9. The Family Support/Enhanced Pupil Services Team	4	3	2	1	NF
10. Tutoring	4	3	2	1	NF
11. The Technology Included in the Program	4	3	2	1	NF
12. The Special Education Practices of the Program	4	3	2	1	NF
13. The Staff Development Received to Support the Program	4	3	2	1	NF
14. The Instructional Facilitator	4	3	2	1	NF
15. The Family Support Coordinator	4	3	2	1	NF
16. The Parent Involvement Programs	4	3	2	1	NF
17. The After School/Extended Day Program	4	3	3	1	NF
18. The Family Health Center	4	3	2	1	NF
19. The Level of Support for the Program by the Principal	4	3	2	1	NF
20. The Level of Support for the Program by the Teachers	4	3	2	1	NF

21. The Level of Support for the Program by County Supervisors	4	3	2	1	NF
22. The Level of Support for the Program by Johns Hopkins Developers and Trainers	4	3	2	1	NF

Please indicate your agreement or disagreement with the following statements.

RATE THE FOLLOWING

	Strongly Agree	Agree	Un-Decided	Disagree	Strongly Disagree
23. R&W has had a positive impact on student achievement.	SA	A	U	D	SD
24. R&W has had a positive impact on student motivation and attitudes towards learning.	SA	A	U	D	SD
25. R&W has had a positive impact on the learning of *at risk* students.	SA	A	U	D	SD
26. R&W has had a positive impact on the learning of gifted students.	SA	A	U	D	SD
27. R&W has had a positive impact on the staff attitudes toward teaching.	SA	A	U	D	SD
28. R&W has had a positive impact on teachers' instructional strategies and professional growth.	SA	A	U	D	SD
29. R&W has been a positive collaboration between the District, the State Education Department, and Johns Hopkins University.	SA	A	U	D	SD
30. I want R&W to continue at my school in the future.	SA	A	U	D	SD

Do you have any suggestions for improving the Roots and Wings program? If so, please describe below.

EXPEDITIONARY LEARNING OUTWARD BOUND
SIXTH GRADE QUESTIONNAIRE
1995

The following questions ask you to check or write in an answer. Please read the directions for each question carefully. Choose the answer that is most true for you.

I. First, tell us something about yourself and your family.

1. What grade are you in? _____

2. What is your date of birth? *(write in)* _____ _____ _____
   month day year

3. What is your gender? *(mark one)*

   Male . . . . . ○
   Female . . . . . ○

4. Which best describes you? *(mark one)*

   a. Hispanic/Latino(a) . . . . . ○
   b. Black, non-Latino(a) . . . . . ○
   c. White, non-Latino(a) . . . . . ○
   d. Native American or Alaskan Native . . . . ○
   e. Asian or Pacific Islander . . . . . ○

   f. Other _____ . . . . . ○
   (write in)

5. What language do the people in your home usually speak? *(mark one)*

   a. English . . . . . ○
   b. Spanish . . . . . ○

   c. Other _____ . . . . . ○
   (write in)

6. Are you eligible for free or reduced-price lunch? *(mark one)*

   Eligible for free lunch . . . . . ○
   Eligible for reduced-price lunch . . . . . ○
   Not eligible . . . . . ○
   I don't know . . . . . ○

II. The next set of questions ask you to think about your experience this year in an Expeditionary Learning/Outward Bound School.

7. Are you new to this school this year?

Yes . . . . . ○ (If yes, go to Q. 8)
No . . . . . ○ (If no, skip to Q. 9)

8. If you are new to this school, in what ways is this school different from your school last year?

_____

_____

_____

9. What I like <u>most</u> about school this year is:

_____

_____

10. What I like <u>least</u> about school this year is: _____

_____

_____

11. Something I thought I could <u>not</u> do, but tried this year is: _____

_____

_____

12. The accomplishment that I am most proud of this year is: _____

_____

_____

13. Subject(s) that I am not learning this year *(but should be learning)* are: _____

_____

_____

14. If you were in this school last year, are there things in the school that have changed? Please describe (for example, amount of work, teachers, opportunities to do work outside of school):

_____

_____

_____

III. Check the response that best describes how you think.

		Always	Most of the time	Sometimes	Rarely	Never
15.	My teachers expect a lot of work from students in this school.	○	○	○	○	○
16.	Students in my class are involved in the planning of expeditions.	○	○	○	○	○
17.	My teachers listen to what I have to say.	○	○	○	○	○
18.	In my classes, the other students listen to what I have to say.	○	○	○	○	○
19.	In my classes, discovering things on our own is a big part of the way we learn.	○	○	○	○	○
20.	I work hard in this school.	○	○	○	○	○
21.	I find the work in this school interesting.	○	○	○	○	○
22.	Teachers encourage students to redo work until it is as good as it can be.	○	○	○	○	○
23.	In this school I have opportunities to pursue my own interests or ideas.	○	○	○	○	○
24.	We work in groups of 3 or more students at least once a week	○	○	○	○	○
25.	When we work in groups, some students try to take over.	○	○	○	○	○
26.	I feel bad if I let my group down.	○	○	○	○	○

		Always	Most of the time	Sometimes	Rarely	Never
27.	My group lets me know if I do not get my work done or try my best.	○	○	○	○	○
28.	My group works well together.	○	○	○	○	○
29.	Working in a group slows me down.	○	○	○	○	○
30.	I learn from the other students when we work in groups.	○	○	○	○	○
31.	I am comfortable participating in my group.	○	○	○	○	○
32.	I fit in well in this school.	○	○	○	○	○

IV. **For each question, check the response that best indicates how much you agree with each statement.** *(mark one for each)*

		Strongly Agree	Agree	I am in Between	Disagree	Strongly Disagree
33.	My classes help me to find out what my interests are.	○	○	○	○	○
34.	How much I learn in this school depends a lot upon my own efforts.	○	○	○	○	○
35.	My teachers encourage students to look at things from different points of view.	○	○	○	○	○
36.	My teachers encourage students of different abilities to work together.	○	○	○	○	○
37.	My teachers encourage respect for women/girls and men/boys of different cultural/ethnic/racial backgrounds.	○	○	○	○	○

38. This year, when I did not understand something in class: *(mark one for each)*

	Often	Sometimes	Never
a. I tried to figure it out on my own.	○	○	○
b. I asked the other students in my class.	○	○	○
c. I asked my teachers to explain it.	○	○	○
d. Other *(write in)*: _____	○	○	○

V. Portfolio Assessment

39. Are portfolio assessments of student work used in your classes?

Yes . . . . . o (If yes, go to Q. 40)
No . . . . . o (If no, skip to Q. 41)

40. Could you describe how portfolios are used in your class?

		Always	Sometimes	Never
a.	Do you discuss the work you put in your portfolios with your teachers in conferences?	○	○	○
b.	Do you discuss standards for doing good work in your classes?	○	○	○
c.	Do you spend time revising your work until it is as as good as you can make it?	○	○	○
d.	Do you write or talk about what you did well and areas you need to work on?	○	○	○
e.	Do you have opportunities to comment on the work of other students?	○	○	○
f.	Do you explain the contents of your portfolio to your parents in teacher/parent conferences?	○	○	○
g.	Do you think that using portfolios helps you to learn better?	○	○	○

h. If you answered always or sometimes to Q. 40g, please give an example of ways in which using portfolios helps you to learn.

_____

_____

VI. Please indicate how much expeditions have helped you with the following:

41. I find that participating in expeditions has helped me:

	A lot	Some	A little	Not at All	Does not apply to me
a. find out ways of getting information that I need	○	○	○	○	○
b. learn how to solve problems	○	○	○	○	○
c. learn how to make plans	○	○	○	○	○
d. learn how to organize my time	○	○	○	○	○
e. learn how to work with different types of people	○	○	○	○	○
f. use information I learned in my class	○	○	○	○	○
g. learn how to get to a place I have never been before	○	○	○	○	○
h. feel comfortable talking to adults	○	○	○	○	○
i. know my community better	○	○	○	○	○
j. prepare for city/state tests in **reading**	○	○	○	○	○
k. prepare for city/state tests in **math**	○	○	○	○	○
l. prepare for city/state tests in **other** subjects	○	○	○	○	○
m. understand how school relates to the "real world"	○	○	○	○	○
n. feel comfortable meeting people I do not know	○	○	○	○	○
o. learn about something I did not know about before	○	○	○	○	○

41. In what other ways has participating in expeditions helped you? _____

_____

_____

_____

_____

42. Is there anything you would like to tell us about your experience at your Expeditionary Learning Outward Bound School?

_____

_____

_____

_____

THANK YOU!

J. REFORM PROGRESS RUBRIC

National Alliance for Restructuring Education

Strategic Planning for Continuous Improvement
Feedback Form for School and Site Plans

SCHOOL:_____ SITE: _____

I. School/Site Background and Situation Analysis

STRONG CASE	GOOD CASE	LIMITED CASE
__ Shows insightful, integrated and data-based grasp of key issues in student characteristics/performance, school culture and school/community compatibility.	__ Presents information about student characteristics/performance, school culture and school/community compatibility; some good insights and some holes/problems in the analysis of these trends	__ Presents information (often fragmented) about student characteristics/performance, school culture and school/community compatibility
__ Reflection points to deep, systemic, Alliance-flavored perspective on real problems and their link to the common Alliance agenda.	__ Reflection shows direction but not deep, systemic Alliance-flavored perspective on real problems and their link to the common Alliance agenda.	__ Reflection shows limited analyses/grasp of what these trends mean for Alliance-flavored perspective on real problems or implications for future reform agenda.
__ Self-evaluation of progress in meeting Alliance indicators of core commitment shows important progress and honest/powerful perspective on how core commitments can aid significant systemic reform in local setting, especially in relation to local key issues discussed in background analysis.	__ Self-evaluation of progress in meeting Alliance indicators of core commitment shows important activity yet a moderate sense of how commitments can aid significant, systemic reform in local setting especially in relation to local key issues discussed in background analysis.	__ Self-evaluation of progress in meeting Alliance indicators of core commitment shows moderate/little activity and little sense of how core commitments are aiding local reform; connection of reform agenda to local key issues in background analysis is often vague or misdirected.

COMMENTS AND SUGGESTIONS:

_____

_____

_____

_____

16

Strategic Plan Feedback (Rubric)

SCHOOL:_____ SITE: _____

II. **School/Site Core Beliefs, Mission and Vision**

STRONG CASE	GOOD CASE	LIMITED CASE
__ Presents a Mission Statement that is the essence of what the school/site wants for all students and the fundamental reforms that will help in get there.	__ Presents a Mission statement that is good but not fully comprehensive, bold nor Alliance-centered around high performance standards for all students and the fundamental reform that will help the site/school get there.	__ Presents no Mission Statement or one that does not reflect what the school/site wants for all students and how to get there.
__ The Vision is based on powerful Core Beliefs (Alliance-oriented) and reflect a deep understanding of each design task and how they fit together to enhance student performance and systemic reform.	__ The Core Beliefs of the Alliance may be stated but not fully integrated into the local vision.	__ The Core Beliefs are not stated or are treated superficially.
__ The Vision provides an extended, rich, background analysis-informed and integrated view of what students will experience and the educational system be like--organized around the 5 design task.	__ The Vision has a general connection to the background analysis; the Vision is organized around the 5 design tasks and shows moderate understanding of what the design tasks would look like when fully implemented; the Vision also has significant holes, poorly developed areas or limited integration across design; the Vision has promise for helping students reach high performance and achieving systemic reform, but considerable work needs to be done in developing this vision.	__ The Vision is not linked to the site/school's background analysis and is not very strong--too vague/idealistic, quite at odds with the Alliance's sense of reform priorities, or is fragmented/incremental; there is little understanding of what the design tasks would look like when implemented in the site/school and how they fit together to enhance student performance and systemic reform.

COMMENTS AND SUGGESTIONS:

_____

_____ 16.

16 _____

_____

_____

Strategic Plan Feedback (Rubric)

SCHOOL:_____ SITE: _____

III. **Desired Results**

STRONG CASE	GOOD CASE	LIMITED CASE
__ Has clear/focused results indicators for student performance that fit with the Alliance view of reform; offers creative/extensive ways to use the 14 common vital signs that are relevant to local setting.	__ Shows good evidence that the 7 Common Student Performance Indicators have been internalized and will be used at the site/school but the use seems mechanical.	__ Has little sense of relevant/powerful vital signs--yet may reproduce the list of 7 Common Vital Signs, but shows little sense of other important student performance outcomes or indicators of systemic reform success; does not connect the indicators to local context.
__ Has generated thoughtful/exciting additional indicators of student performance and systemic reform.	__ Other indicators are OK but not creative nor powerful in focusing on high student performance or systemic reform.	__ May not include other indicators or may have confused change process/task completion indicators with outcome indicators (the desired results).
__ Shows strong evidence of capability/interest in using all results indicators to drive/refine reform efforts.	__ Shows some evidence of capacity/interest in using all indicators to drive/refine reform efforts.	__ Shows little/no evidence of capacity/interest in using all indicators to drive/refine the standards-driven students/systemic reform.

COMMENTS AND SUGGESTIONS:

_____

_____

_____

_____

_____

_____

Strategic Plan Feedback (Rubric)

SCHOOL:_____ SITE: _____

IV. **Design and Implementation**

STRONG CASE	GOOD CASE	LIMITED CASE
__ Has organized the design and implementation around key components that are the heart of the vision/vital signs.	__ Has identified some promising design/implementation components but these are not fully integrated into the vision/vital signs.	__ Shows little connection of the vision to the design/implementation and little sense of what the design is supposed to accomplish--results are not stated or are unclear/disconnected from the site/school vision or the Alliance Core Beliefs.
__ Shows a powerful understanding of how to tackle ambitious, large scale change through analysis of present context, and the integration of strategies, governance, leadership and resources to achieve full implementation of the change.	__ Shows mixed understanding of how to tackle ambitious, large scale change in connecting context, the integration of strategies, governance, leadership and resources; the design/implementation plan has some serious flaws yet considerable promise.	__ The large design/implementation shows little sense of what it takes to tackle ambitious large scale change in connecting context, integration of strategies, governance, leadership and resources to achieve full implementation of the change.
__ Puts capacity-building and systemic thinking/transformation at the heart of the design/implementation process.	__ The focus on capacity building and systemic thinking/transformation is a good beginning, but needs some improvement.	__ Little sense of capacity-building and systemic thinking/transformation as the heart of the design/implementation process.
__ The culture of the site/school clearly supports extensive meaningful reform -- the plan has integrated strategies to build school culture.	__ The site/school culture only partially supports comprehensive reform -- limited attention to building a strong school culture .	__ The site/school culture is ignored or presents a significant limitation for the reform.

COMMENTS AND SUGGESTIONS:

_____

_____

_____

_____

_____

Strategic Plan Feedback (Rubric)

SCHOOL:_____ SITE: _____

V. **Implementation Timeline**

STRONG CASE	GOOD CASE	LIMITED CASE
__ Presents a timeline that is organized around components that are strongly linked to desired results.	__ Presents a timeline that is organized around components that are somewhat linked to desired results.	__ Presents no timeline or one that may not be organized around components and desired results.
__ Reflects deep insights about how to tackle large scale change; integrates strategies in feasible yet powerful way to reach quality results.	__ Shows some insight about the process of comprehensive reform--but misses key strategies or connections.	__ Shows limited insight about the process of comprehensive reform.
__ Provides excellent detail (what/when/who) about specific strategies and activities.	__ Provides detail (what/when/who) about specific strategies and activities but these lack robustness, feasibility, focus or integration.	__ Provides no detail or the detail is mis-directed and fragmented.
__ Powerfully integrates national reform agenda/tasks/core commitments with integrated local transformation.	__ Shows some integration of national and local reform agenda, tasks, and core commitments.	__ Shows little connection of national and local reform agendas--participation in national reform events are treated as isolated activities from the local reform agenda.
__ Shows how effort is continuously informed by results, and works towards continuous improvement.	__ Shows some monitoring of change process/results, but not a powerful, flexible, continuous process that will produce major results in a complex world.	__ Shows linear view of change that is not especially flexible nor informed by results or efforts.

COMMENTS AND SUGGESTIONS:

_____

_____

_____

_____

SCHOOL:_____SITE: _____

VI. **Collaborative Agreements**

STRONG CASE	GOOD CASE	LIMITED CASE
__ Shows collaborative agreements that engage significant key partners and stakeholders in systemic reform.	__ Shows collaborative agreements that involve key players (but perhaps not all needed key players).	__ Has no collaborative agreements or ones that show little sign of engaging key partners and stakeholders in systemic reform.
__ Shows considerable insight about the purpose, guiding principles and arrangements for this collaboration, and what it will take to make the collaboration successful and long-lasting.	__ The Agreements are connected to the background analysis; the Agreements focus on meaningful pieces of reform (but perhaps not in a fully integrated way) and on arrangements for reform--but need greater emphasis on powerful student performance for all students.	__ The Collaborative Agreements show little sense of connection to the background analysis and little purpose or arrangements for systemic reform focused on powerful student performance for all students.

ADDITIONAL COMMENTS: _____

_____

_____

_____

_____

_____

K. REFORM INTERVIEW SCHEDULE

1. How would you describe the level at which the design elements are in place and observable at your school? If they are not yet well implemented, are they sufficiently well described? Are the resources--personnel, material, financial, scheduling--available for implementation?

2. How would you describe the level at which students and others at your school have benefited so far from the design elements? What types of benefits are you seeing and how are you gauging them?

3. What is your judgment about the possible success with which the design elements could be implemented next year at other, diverse school sites? What remains to be done before other sites should attempt to adopt the design?

4. Please describe the nature and quality of any summer activities in which you participated?

5. In general, how would you now characterize your attitude toward the NASDC program in your school?

6. If the NASDC program were to discontinue in your school, what is the one thing for which it would be best remembered?

7. What is the one thing your school and the design team are not doing fully that it should do to help all students reach world-class knowledge and skill levels?

L. CONTEXT DATA WORKSHEET

Student Population

		1994/95	1995/96	1996/97	1997/98
ENROLLMENT					
GENDER	Male				
	Female				
RACIAL/ETHNIC STATUS	American Indian/Alaskan Native				
	Asian/Pacific Islander				
	African American				
	White (not of Hispanic origin)				
	Hispanic				
	Other				
LIMITED ENGLISH PROFICIENT					
FREE/REDUCED PRICE MEALS					
CHAPTER 1					
SPECIAL EDUCATION					
GIFTED/TALENTED					
MOBILITY					
STANDARDIZED TEST DATA (describe battery, form, score scale)	Grade ____				
	Grade ____				
	Grade ____				

CONTEXT DATA--SCHOOL CHARACTERISTICS

		1994/95	1995/96	1996/97	1997/98
STAFFING LEVELS	Instructional Staff				
	Administrative Staff				
INSTRUCTIONAL TIME					
BUDGET INFORMATION	Federal Moneys				
	District Funds				
	Grant and Contract Funds				
	PTA and Other Fundraising Moneys				
	Other Funds				

Example Definitions for Context Data:

1. Enrollment--Number of students enrolled on 9/30.

2. Student population characteristics--Number and percent of students (on 9/30 or average daily during the official school year) disaggregated by gender, race, language proficiency, free/reduced price meals, Chapter 1, special education, and talented/gifted; where applicable, the following definitions may be used for disaggregation:

   Gender--male/female

   Race--American Indian/Alaskan Native, Asian/Pacific Islander, African American, White (not of Hispanic origin), Hispanic, other (census categories)

   Limited English proficient--have primary or home language other than standard English and have limited or no age-appropriate ability to understand, speak, read or write English

   Free/reduced price meals--meet family size and income guidelines (US Department of Agriculture) for free/reduced price meals

   Chapter 1--receive services funded in whole or part by Chapter 1, ESEA

   Special education--students with learning or physical disabilities who have current Individualized Education Programs and are served by the system

   Gifted and talented--are identified as academically gifted and/or talented and receive services/programs funded by the system

3. Mobility--number and percent (of enrollment) of students (1) entering the school after 9/30, and (2) transferring or dropping out after 9/30 and before 6/1.

4. Norm- or criterion-referenced test data (if available from an ongoing program)--summaries of standardized test data reported as percentiles, stanines, normal curve equivalents, grade equivalents, or standard- or scale-based scores (include descriptions of scale or rubric definitions)

5. Staffing levels--number and percent (of enrollment) of instructional staff (staff who perform professional activities related to teaching students) and professional support staff (staff who provide auxiliary services for students or the program, including librarians, counselors, principals, administrative assistants, etc.).

6. Instructional time--average total time per day spent on instructinal activities and days of instruction per year.

7. Budget information--funds from the district (per pupil expenditures and other district-provided moneys), Chapter 1, Chapter 2, Goals 2000, grant, and other funds, PTA and other fund-raising moneys.

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