



GUIDE TO PILOTING A NEW CURRICULUM MODEL OR PROGRAM

Prepared for the Connecticut Department State of Education

TABLE OF CONTENTS

INTRODUCTION	3
SECTION I: DESIGN THE PILOT STUDY	4
Plan the Pilot	4
Plan the Evaluation Study	6
SECTION II: EXECUTE THE PILOT	9
Determine and Recruit the Pilot Participants	9
Implement the Pilot and Collect Data	10
SECTION III: ENGAGE WITH EVALUATION RESULTS	15
Analyze Data	15
Make Scaling Decisions	16

INTRODUCTION

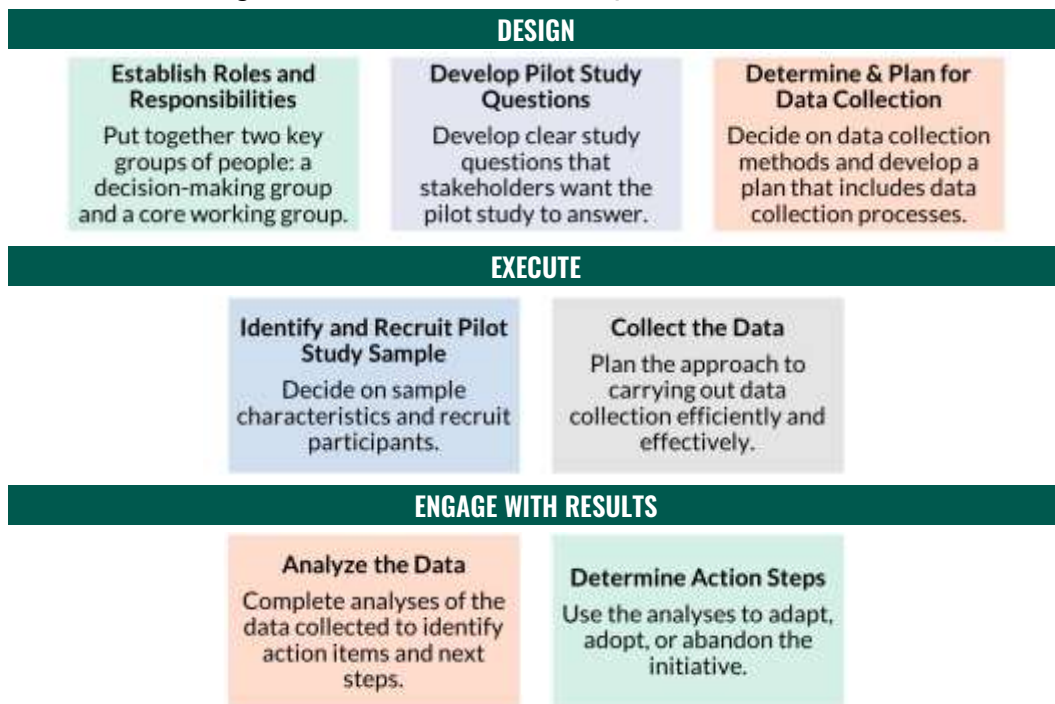
The Connecticut State Department of Education (CSDE) partnered with Hanover Research (Hanover) to develop a guide on effectively piloting and scaling curriculum models or programs. This guide offers practical guidance for district leaders on planning and implementing a curriculum pilot, collecting and analyzing evaluation data, and scaling the program. In alignment with Figure E.1, which offers an overview of the pilot study process, this guide includes the following three sections:



BENEFITS OF CONDUCTING PILOTS PRIOR TO FULL IMPLEMENTATION

Conducting a pilot study facilitates successful full-scale implementation by gathering data on necessary program modifications, implementation hurdles and challenges, conditions that support success, and school leaders' and teachers' perceptions of the new curricula.¹ Pilot study data on how the program performs in the district's context also inform decision-making about whether to fully scale the program.²

Figure E.1: Overview of Pilot Study Evaluation Process



Source: Institute of Education Sciences, U.S. Department of Education³

¹ [1] Klute, M. "Starting Small: How Pilot Studies Can Yield Valuable Insights." Regional Educational Laboratory Program (REL), December 10, 2021. <https://ies.ed.gov/ncee/rel/Products/Region/appalachia/Blog/100320> [2] "Learning Before Going to Scale: An Introduction to Conducting Pilot Studies." Regional Educational Laboratory Appalachia, U.S. Department of Education, May 2021. p. 2. https://ies.ed.gov/ncee/edlabs/regions/appalachia/resources/pdfs/Pilot-Study-Resource_acc.pdf

² "Tips and Recommendations for Successfully Pilot Testing Your Program." National Center for Complex Health and Social Needs, 2021. p. 1. <https://www.nationalcomplex.care/wp-content/uploads/2021/05/Tips-and-Recommendations-for-Successfully-Pilot-Testing-Your-Program-1.pdf>

³ Figure reproduced verbatim from: "Learning Before Going to Scale: An Introduction to Conducting Pilot Studies," Op. cit., p. 5.

SECTION I: DESIGN THE PILOT STUDY

This section discusses strategies for designing a pilot study, including planning the pilot and planning the evaluation and data collection methods.

PLAN THE PILOT

Piloting a new curriculum model or program necessitates planning the curriculum to pilot, the pilot team, pilot participants, and additional pilot logistics. District leaders can choose to select a curriculum to pilot first, or establish a pilot team and assign the responsibility for selecting the curriculum to the pilot team.⁴

ESTABLISH A TEAM

When designing a pilot and associated pilot study, districts should establish teams comprising individuals of diverse roles to lead, implement, evaluate, and make decisions regarding the pilot.⁵⁶ Factors to consider when determining the pilot team’s composition include:⁷

- Expertise needed to conduct and evaluate the pilot;
- Team member availability during the pilot timeframe;
- Research and evaluation staff with research methodology and data analysis expertise;
- Allocated resources; and
- Key influencers for supporting scaling decisions.

In a report on conducting pilot studies by the U.S. Department of Education’s Regional Educational Laboratory Appalachia, the authors recommend a two-part pilot team, where one group is responsible for making overarching curriculum and policy decisions regarding the study’s purpose and plan forward using the study results, while another core group leads daily responsibilities for designing and implementing the pilot and evaluation.⁸ Figure 1.1 below highlights differences in the responsibilities and staff compositions of each group.

Figure 1.1: Pilot Team Components



Source: Regional Educational Laboratory Appalachia, U.S. Department of Education⁹

⁴ “Piloting New Curriculum Options with Educators.” Achieve the Core, September 1, 2016.

<https://achievethecore.org/peersandpedagogy/piloting-new-curriculum-options-with-educators/>

⁵ “Activity: Plan and Run a Pilot.” Resources & Guidance from The Learning Accelerator.

<https://practices.learningaccelerator.org/strategies/activity-plan-and-run-a-pilot>

⁶ “Learning Before Going to Scale: An Introduction to Conducting Pilot Studies,” Op. cit., p. 8.

⁷ Bullet points adapted from: Ibid., p. 9.

⁸ Ibid., p. 8.

⁹ Figure content quoted verbatim from: Ibid., pp. 8–9.

DETERMINE THE PILOT’S GOAL AND SCOPE

Planning the curriculum pilot requires school leaders or the pilot team to determine the pilot’s goal and scope. The pilot team should consider their purpose for piloting the new curriculum model or program and discuss what they hope to learn. These discussions can inform the pilot’s scope, which encompasses what the pilot will include. For example, will teachers implement the full years’ worth of the curriculum or a sample of units?¹⁰ Figure 1.2 below discusses these considerations for scoping a curriculum pilot and potential pitfalls to avoid with each approach.

Figure 1.2: Considerations for Determining the Scope of the Pilot

CONSIDERATION	DESCRIPTION	POTENTIAL PITFALLS
Single Curriculum Unit or Module	This approach spans 4-6 weeks of instruction. If piloting multiple curricula, this approach allows the same group of teachers to pilot multiple sets of materials to compare them to one another.	<ul style="list-style-type: none"> It is important to be strategic about which unit/module is selected for the pilot. Select a unit/module that is representative of the curriculum and is of high quality. The unit/module should also be selected to fit into the current scope of sequence of instruction where possible, so teachers can see how students respond to new content from the curriculum and continuing to make sure students are learning the “right stuff” in the school year.
Multiple Units/Modules or Full Year	In this approach, multiple units/modules and/or a full year of curriculum is piloted. This is best utilized to use the pilot to learn and prepare for full implementation.	<ul style="list-style-type: none"> Multiple units or modules can be an effective strategy for a Phase II pilot because it provides district and school leadership with more opportunities to learn about effective implementation. A full year approach lengthens the overall selection and implementation process, making this a multi-year effort from selection to full implementation. This can be helpful as it helps to build a coalition of stakeholders invested in the process, but there is a risk of losing momentum in the process and it takes longer to address core instructional challenges.

Source: Instruction Partners¹¹

Additional considerations for planning the pilot phase, which also impact the pilot study timeline, include:¹²



¹⁰ “Guidance on Pilots and Selection.” Instruction Partners. pp. 2–3. <https://curriculumsupport.org/wp-content/uploads/2019/02/Guidance-on-Pilots-and-Selection-1.pdf>

¹¹ Figure content quoted verbatim with modification from: Ibid.

¹² Box contents quoted verbatim with slight modification from: “Learning Before Going to Scale: An Introduction to Conducting Pilot Studies,” Op. cit., pp. 5–6.

PLAN THE EVALUATION STUDY

Creating a plan with criteria for evaluating the pilot’s implementation and outcomes is critical to ensuring the pilot’s value and success.¹³ The plan should specify the pilot study purpose, pilot study questions, data types and collection methods, and the roles, responsibilities, and timelines for the evaluation.¹⁴ Figure 1.3 below presents considerations for planning pilot study evaluations, depending on the purpose of the evaluation.

Figure 1.3: Considerations for Evaluating Pilot Programs

PURPOSE	CONSIDERATIONS	POTENTIAL PITFALLS
Initial material selection and buy-in	<ul style="list-style-type: none"> ▪ The criteria by which each set of materials will be evaluated in alignment with the overall selection criteria. ▪ The specific questions you aim to answer through the pilot about each set of materials; this could include questions about the training required, the instructional time required to implement, the impact on specific student populations (English Language Learners, students with IEPs, etc.). ▪ A way to synthesize the learning from the pilot to inform the decision-making process. 	<ul style="list-style-type: none"> ▪ Relying solely on the perceptions and opinions of the teachers who participated in the pilot without some objective criteria. ▪ Looking to student achievement data to inform the decision. Most pilots are too short to have a measurable impact on student data and it will provide a false positive or false negative of the impact the materials may have.
Preparing for implementation	<ul style="list-style-type: none"> ▪ The specific questions you aim to answer through the pilot. ▪ Clear roles/responsibilities and expectations for pilot implementation and for capturing and synthesizing learning. ▪ A plan to monitor progress for the pilot, including specific times to synthesize learning aligned to each of the questions determined. 	<ul style="list-style-type: none"> ▪ Not working through the challenges that emerge during the pilot and engaging in continuous improvement. There is a risk of viewing it as “just a pilot” and not investing the time and energy to work out challenges in real time to find a strong solution and leverage the pilot. ▪ Expecting measurable changes in student achievement data. The impact of materials on student learning can take time and looking for measurable impact can lead to a false positive or false negative of the potential impact of the materials. ▪ Not having a clear approach to synthesize and capture learning on a regular basis, so you are not able to apply the lessons learned to the full roll-out of materials.

Source: Instruction Partners¹⁵

¹³ “Guidance on Pilots and Selection,” Op. cit., pp. 2–3.

¹⁴ “Learning Before Going to Scale: An Introduction to Conducting Pilot Studies,” Op. cit.

¹⁵ Figure content quoted verbatim with modification from: “Guidance on Pilots and Selection,” Op. cit., pp. 2–3.

IDENTIFY PILOT STUDY QUESTIONS

Evaluation questions represent a key component of the evaluation plan, as they direct the kind of data collected and the information gathered from the pilot. The pilot study questions steer nearly every component of both the pilot itself and the evaluation, including:¹⁶

- Decision-making regarding the pilot and its outcomes;
- Choosing the most efficient way to collect data that are already available;
- Developing or selecting instruments to collect new data;
- Selecting the appropriate analytic approach; and
- Communicating results in a way that decision-makers can use.

Notably, pilot teams should seek input from educators and decision-makers when establishing pilot questions, since these questions drive the pilot study.¹⁷ If the team develops more questions than they have the capacity to study, team members should prioritize the questions by importance and feasibility, taking into account available data, data collection capacity, and timelines.¹⁸ Accordingly, the higher number of evaluation questions, the greater the data collection and analysis capacity needed.¹⁹ Figure 1.4 presents a checklist of criteria for effective pilot study questions.

Figure 1.4: Pilot Study Question Checklist

CRITERIA	YES	NO	NOTES
<i>Are the pilot questions:</i>			
Aligned with the theory of change			
Clearly focused and specific			
Address information needs			
Answerable in the study time frame			
Reasonable and appropriate			

Source: Regional Educational Laboratory Appalachia, U.S. Department of Education²⁰

DETERMINE DATA TYPES AND DATA COLLECTION METHODS

Prior to determining how they will collect data to evaluate the pilot program, the pilot team must identify the data to collect. As data should answer the pilot study questions, teams can look to the study questions to identify data sources. Once the team identifies the types of data to collect, they should consider what new data they will have to collect and what data may already exist within the district or at the school level.²¹

Next, the pilot team must decide on how to collect this data.²² Sample data collection methods include surveys, focus groups, qualitative interviews, observations, and using data already collected through district information systems.²³ Figure 1.5, on the following page, highlights additional methods. The pilot team can

¹⁶ Bullet points quoted verbatim from: “Learning Before Going to Scale: An Introduction to Conducting Pilot Studies,” Op. cit., p. 12.

¹⁷ Ibid., p. 14.

¹⁸ Ibid.

¹⁹ Ibid., p. 12.

²⁰ Figure contents quoted verbatim from: Ibid., p. 13.

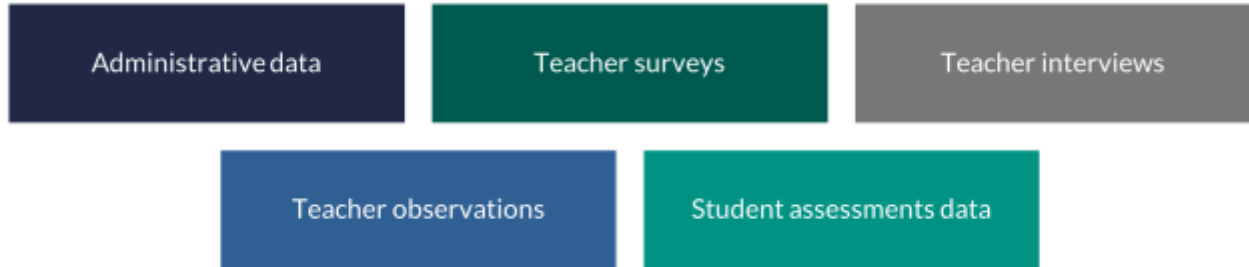
²¹ Ibid., p. 16.

²² Ibid., p. 10.

²³ Ibid., pp. 18–20.

combine multiple data collection methods, but should choose those that align with the data type.²⁴ Notably, an important consideration when determining data collection methods is timelines, as data collection timelines should align with district and school schedules.²⁵

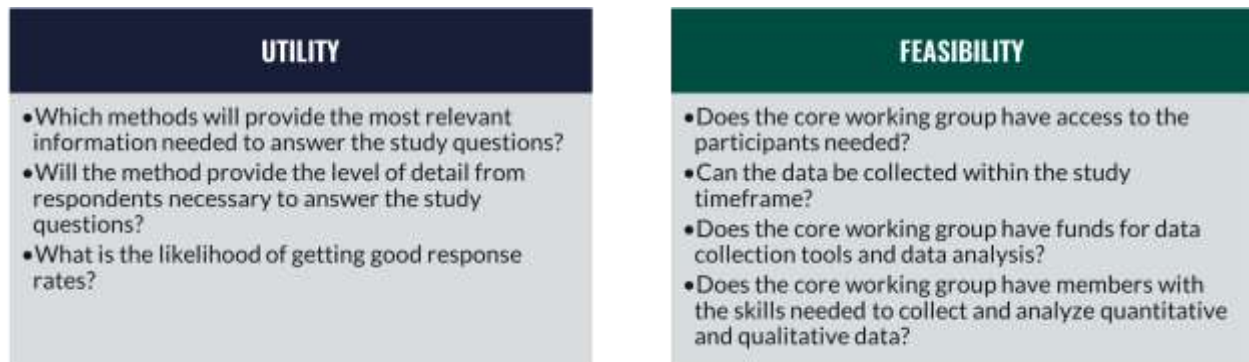
Figure 1.5: Sample Data Sources for Pilot Study Evaluations



Source: Regional Educational Laboratory Appalachia, U.S. Department of Education²⁶

Two considerations when selecting data collection methods include utility and feasibility. Indeed, “utility refers to what is most appropriate for the type of data needed, and feasibility refers to what is most appropriate given constraints such as cost, resources, staff capacity, and time.”²⁷ Figure 1.6 below highlights questions pilot teams should consider when discussing how these two factors impact their decisions regarding data collection methods.

Figure 1.6: Questions to Consider When Choosing Data Collection Methods



Source: Regional Educational Laboratory Appalachia, U.S. Department of Education²⁸

²⁴ Ibid., p. 10.

²⁵ Ibid., p. 21.

²⁶ Box contents quoted verbatim from: Dahlke, K., M. Little, and J. Keizer. “Coaching Session 3: Pilot Study Planning.” REL Southwest, U.S. Department of Education, January 9, 2020. p. 9.

<https://ies.ed.gov/ncee/edlabs/regions/southwest/publications/pdf/task-5-2-14/relsw5214-s3h2-slides-508.pdf>

²⁷ “Learning Before Going to Scale: An Introduction to Conducting Pilot Studies,” Op. cit., p. 10.

²⁸ Figure contents quoted verbatim from: Ibid., p. 18.

SECTION II: EXECUTE THE PILOT

This section reviews steps for conducting the pilot, including identifying participants, implementing the pilot, and collecting data.

DETERMINE AND RECRUIT THE PILOT PARTICIPANTS

Planning the pilot also requires determining which schools, grades, and teachers will pilot the new curriculum and gaining buy-in from those recruited to agree to participate in the pilot.²⁹ Before engaging in participant recruitment, the pilot team must consider the characteristics to prioritize including in the study. For example, if school sites have different student demographics (e.g., the proportion of students receiving free or reduced-price lunch) or different grade levels, the team should determine which will offer the most relevant data about the piloted curriculum?³⁰ Notably, teams should “consider which characteristics are more likely to affect implementation and make sure you include participants with those characteristics in your sample.”³¹

The pilot team must also decide on the size of the pilot participation group (e.g., one school, multiple schools, multiple grades across multiple schools).³² Data collection methods should inform the participant size. For example, data collection methods that require more staff capacity and time, such as observations or interviews, may necessitate a smaller sample representative of the larger population, while less resource-intensive methods, such as surveys, can support larger participant groups.³³ Figure 2.1 reviews considerations for identifying and selecting pilot participants.

Figure 2.1: Considerations for Selecting Pilot Participants

CONSIDERATION	DESCRIPTION	POTENTIAL PITFALLS
Scale	<ul style="list-style-type: none"> How many teachers do you want to participate in the pilot? How does this fit into your broader educator engagement strategy? 	<ul style="list-style-type: none"> Not involving teachers or leaders with informal authority who have the ability to influence other teachers or leaders and build their buy-in, or not involving teachers/leaders who may be harder to invest. It can be challenging to limit the pilot when there is greater interest, but if you truly want to use the pilot to learn and prepare for an effective roll-out, it is important to keep the scale manageable, so you can closely study and monitor implementation to inform your broader roll-out.
Selection	<ul style="list-style-type: none"> How will you select teachers to participate? Will teachers opt-in to the pilot or will they be chosen? What are the expectations for participation? How will you leverage teachers/leaders who hold informal authority within your system and can help influence others? 	<ul style="list-style-type: none"> Oftentimes, schools choose to pursue new materials after identifying a gap in current materials. If you choose to pilot materials in certain schools or grades (versus system-wide), this means that some students will not receive access to potentially higher quality materials. Consider ways to support teachers and leaders in strengthening current materials while piloting to ensure equity as much as possible.

²⁹ [1] *Ibid.*, p. 23. [2] “Guidance on Pilots and Selection,” *Op. cit.*, pp. 2–3.

³⁰ “Learning Before Going to Scale: An Introduction to Conducting Pilot Studies,” *Op. cit.*, p. 23.

³¹ *Ibid.*

³² *Ibid.*

³³ *Ibid.*, p. 24.

CONSIDERATION	DESCRIPTION	POTENTIAL PITFALLS
Individual teachers vs. teams	<ul style="list-style-type: none"> Do you want full teams to participate or just individual teachers? 	<ul style="list-style-type: none"> Having full teams or an entire school engage in a pilot enables you to study the impact on other structures or systems (i.e., PLCs, professional development, etc.). If the materials being considered have different structures in different grade levels (i.e. K-2 materials are slightly different from 3-5, K-5 is different from 6-8, etc.), you want to be sure to pilot in each configuration.
Grade level span	<ul style="list-style-type: none"> Do you want to span a few grade levels? All grade levels? 	
Entire school	<ul style="list-style-type: none"> Is there one specific school that wants to pilot the materials for your system? 	

Source: Instruction Partners³⁴

Once the pilot team identifies the site(s) and participant characteristics of interest, they should start recruiting participants and obtain consent to participate in the evaluation.³⁵ Strategies for supporting effective participant recruitment include:³⁶

- Using incentives;
- Ensuring communications come from a trusted source;
- Provide concise, clear, and visually engaging resources;
- Offer multiple modes of information dissemination; and
- Provide follow-up communications.

IMPLEMENT THE PILOT AND COLLECT DATA

Next, it is time to implement the pilot and collect data. Throughout the implementation period, monitor how it is going and record lessons learned as pilot teachers navigate the new curriculum model or program. The experiences of participants during the pilot can provide valuable lessons for scaling the curriculum to supplement the collected data.³⁷ While collecting data during pilot implementation, the pilot team should ensure to follow their planned collection procedures and maintain ongoing communication between pilot team members and school staff implementing the program. Figure 2.2, on the following page, offers additional guidance for collecting data while implementing pilot programs.

³⁴ Figure content quoted verbatim with modification from: "Guidance on Pilots and Selection," Op. cit., pp. 2–3.

³⁵ "Learning Before Going to Scale: An Introduction to Conducting Pilot Studies," Op. cit., pp. 25–26.

³⁶ Bullet points quoted verbatim with modification from: Dahlke, Little, and Keizer, Op. cit., p. 27.

³⁷ "Success at Scale." Deloitte. p. 8. https://www2.deloitte.com/content/dam/insights/us/articles/4535_Secrets-to-scaling/DI_Secrets-of-scale.pdf

Figure 2.2: Strategies for Effective Pilot Study Data Collection



Source: Regional Educational Laboratory Appalachia, U.S. Department of Education³⁸

PROVIDE IMPLEMENTATION TRAINING

Effectively executing the pilot includes training teachers and pilot participants on how to implement the new curricular materials. Regardless of the size of the pilot’s scope, implementation training is critical to help prepare teachers to appropriately engage with the curriculum.³⁹ In addition to initial training, district pilot teams should establish structures to provide ongoing implementation support.⁴⁰ Figure 2.3, on the following page, presents considerations for providing training to teachers when implementing a new curriculum pilot.

³⁸ Figure text quoted verbatim from: “Learning Before Going to Scale: An Introduction to Conducting Pilot Studies,” Op. cit., pp. 28–29.

³⁹ [1] “Guidance on Pilots and Selection,” Op. cit., p. 5. [2] “Piloting New Curriculum Options with Educators,” Op. cit. [3] Dahlke, Little, and Keizer, Op. cit., p. 8.

⁴⁰ Dahlke, Little, and Keizer, Op. cit., p. 8.

Figure 2.3: Considerations for Providing Curriculum Implementation Training

CONSIDERATION	POTENTIAL PITFALLS
<ul style="list-style-type: none"> ■ While the pilot may be limited in scope, it is essential that teachers and leaders receive some training on the materials to prepare them for implementation. This should include: <ul style="list-style-type: none"> ○ An overview of the design and architecture of the materials, including how units and lessons are structured and the scope of the year. ○ The key instructional practices that may be employed within the curriculum. 	<p>Many pilots tend to overlook the training needs teachers and leaders have when piloting new materials.</p> <ul style="list-style-type: none"> ■ Teachers can become frustrated without appropriate training because they are unsure of how to use the materials or are not using them effectively. This can lead to teachers having a poor experience with the materials and becoming disinvested in the options. ■ Leaders may hear frustrations from their teachers and become disinvested in the materials and/or not know how to support teachers to work through the challenges that emerge. ■ You may not get the outcomes you want from a pilot because perceptions of the materials are influenced by the training, or lack thereof, instead of by the materials themselves.
<ul style="list-style-type: none"> ■ Additionally, providing training in the pilot can help illuminate future training needs should those materials be selected or if you are planning a broader roll-out. 	
<ul style="list-style-type: none"> ■ If you are piloting multiple sets of materials, teachers and leaders will need some brief training in each set of materials to ensure they implement the materials appropriately. This can also provide insight into the quality of training offered by different publishers, which can be a factor in your decision. 	

Source: Instruction Partners⁴¹

ENSURE ONGOING COMMUNICATION

Throughout the pilot planning and implementation stages, district leaders and the pilot team should engage in ongoing communication within the team, with decision-makers, and with pilot participants. Piloting a new program represents a substantial change for many staff, especially teachers. Accordingly, district leaders can take a change management approach to communicating the pilot’s purpose, implementation, and results to support successful outcomes.⁴²

Communication skills for supporting changes within schools include “[k]nowing what to say and how to say it to build and sustain commitment to the change.”⁴³ Notably, when not provided sufficient information on what is happening, “employees will simply fill in their fears and anxieties with information, usually negative” about the organization and leader.⁴⁴ Therefore, leaders should be accurate and reliable in their communication about the pilot and “resist the temptation to appear secretive, inaccessible, or withdrawn.”⁴⁵ Additionally, successful messages focus on the “why” of the change; meaning, in addition to communicating about what is happening, leaders should also be transparent and actively increase staff understanding about why and how

⁴¹ Figure content quoted verbatim with modification from: “Guidance on Pilots and Selection,” Op. cit., pp. 2–3.

⁴² [1] “6 Lessons for Leading Change in Schools.” Battelle for Kids, March 8, 2016. <https://www.battelleforkids.org/learning-hub/learning-hub-item/6-lessons-learned-about-leading-and-navigating-change-in-schools> [2] Bendixen, S.M. et al. “Change-Capable Leadership The Real Power Propelling Successful Change.” Center for Creative Leadership, 2017. pp. 11–13. <https://cclinovation.org/change-capable-leadership-the-real-power-propelling-successful-change/>

⁴³ Bendixen et al., Op. cit., pp. 11–13.

⁴⁴ [1] Allen, T. “Layoffs On The Horizon? How To Lead Through A Reduction In Force.” Forbes, November 28, 2018. <https://www.forbes.com/sites/terinaallen/2018/11/28/do-all-of-this-before-you-lay-me-off-how-gm-and-others-can-get-this-right/> [2] Sutton, R.I. “How to Be a Good Boss in a Bad Economy.” Harvard Business Review, June 2009. <https://hbr.org/2009/06/how-to-be-a-good-boss-in-a-bad-economy>

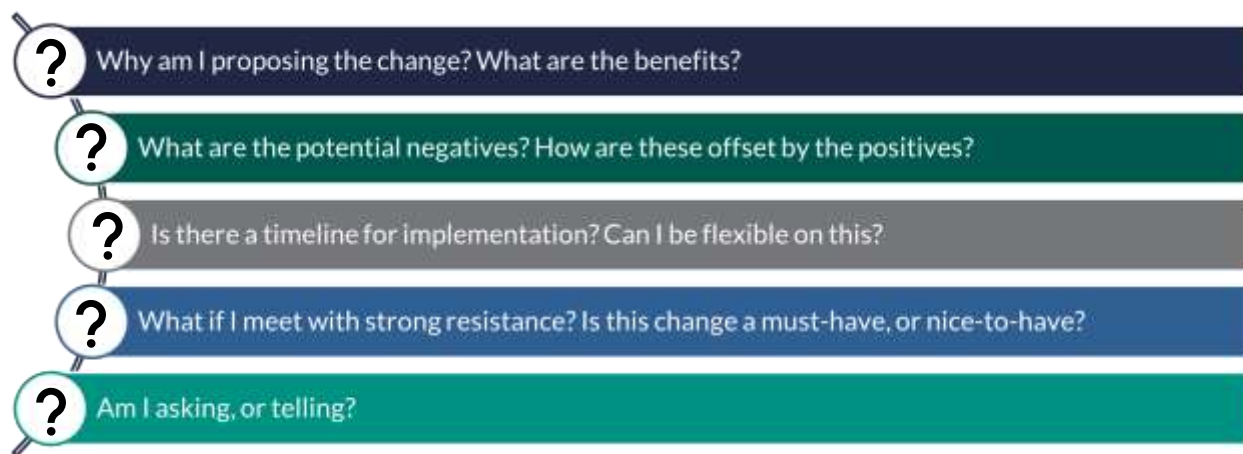
⁴⁵ Allen, Op. cit.

something is happening.⁴⁶ Effective messages are concrete, specific, simple, repetitive, and targeted to different groups.⁴⁷ Essential features of a communication strategy when implementing a new initiative include:⁴⁸

- Messaging that is appropriate to specific stakeholder audiences;
- Consistency in messaging reflecting the shared language of the community;
- Connections to broader school strategies, priorities, and expectations for outcomes; and
- Communication that serves as a feedback loop, with avenues for both pushing information out and also hearing back from key constituencies.

Key questions for consideration that leaders may ask to ensure communication answers stakeholder questions and reduces concerns include those in Figure 2.4.

Figure 2.4: Guiding Questions for Communicating Change



Source: Education Technology Solutions⁴⁹

Using multiple communication channels helps districts and schools ensure successful and centralized communication with staff, teachers, and employees. In particular, staff portals on the district or school website are valuable places for staff, teachers, and other employees to access centralized information strictly pertinent to them (e.g., internal announcements, e-mails, technical support, support and coaching, and performance reviews).⁵⁰ Video e-mails, collaborative blogs, voice messages, weekly updates, and face-to-face communication are other significant internal communication channels that allow districts and schools to streamline information and foster positive working relationships.⁵¹ Additionally, schools can use digital

⁴⁶ [1] Sutton, Op. cit. [2] "6 Lessons for Leading Change in Schools," Op. cit.

⁴⁷ [1] Sutton, Op. cit. [2] "6 Lessons for Leading Change in Schools," Op. cit. [3] "Successfully Implementing Transformational Change in Education: Lessons Learned About the Importance of Effective Change Leadership and Strategic Communications," Op. cit., p. 2.

⁴⁸ Bulleted text reproduced verbatim from: "Change Leadership - A Guide for School Leaders." Minnesota Department of Education, February 2019. p. 30.
https://education.mn.gov/mdeprod/idcplg?IdcService=GET_FILE&dDocName=mde059459&RevisionSelectionMethod=latestReleased&Rendition=primary

⁴⁹ Figure text reproduced verbatim with modifications from: Burrell, L. "Managing Change In Schools." Education Technology Solutions, July 22, 2014. <https://educationtechnologysolutions.com/2014/07/managing-change-in-schools/>

⁵⁰ Lynch, M. "6 Best Practices for Internal Communication in Public Schools." The Advocate, September 14, 2016.
<https://www.theedadvocate.org/6-best-practices-internal-communication-public-schools/>

⁵¹ "Good Ways to Communicate with Teachers." *Educational Leadership*, April 2015.
<http://www.ascd.org/publications/educational-leadership/apr15/vol72/num07/Good-Ways-to-Communicate-with-Teachers.aspx>

signage to communicate with educators throughout the school day. Digital signs are especially vital for communication when educators cannot immediately access e-mails or log into portals. Digital signs placed throughout schools are recognizable and do not require additional effort to process the information and can display both general and emergency information.⁵² Figure 2.5 details how district leaders can best communicate with their administrative team as well as school staff.

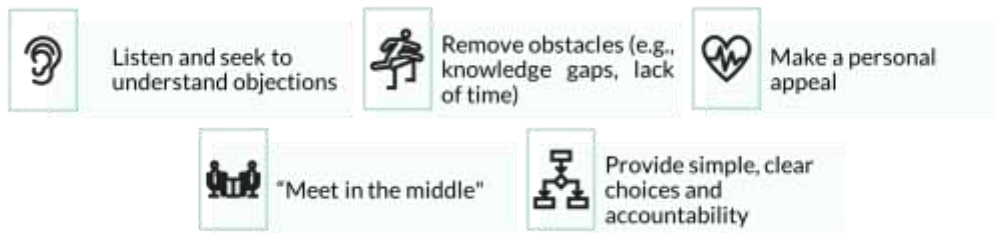
Figure 2.5: Internal Communication Strategies for Superintendents



Source: Region 10 Education Service Center⁵³

Furthermore, district leaders and the pilot team can use communication strategies to build buy-in for the pilot and new curriculum. Building buy-in among stakeholders and ensuring implementation capacity among those enacting change may reduce resistance and frustration and build confidence.⁵⁴ District leaders can work to reduce resistance and emotions that create barriers to change (e.g., anxiety, confusion, fear).⁵⁵ When implementing a change, such as a new instructional program, leaders should prepare for resistance and a lack of readiness and engage with stakeholders early in the change process.⁵⁶ Specific actions to build buy-in include those in Figure 2.6.

Figure 2.6: Strategies to Build Buy-In



Source: Atlas⁵⁷

⁵² Lynch, Op. cit.

⁵³ Figure contents taken verbatim with minor modifications from: “Communication Essentials: What Superintendents Need to Know and Want to Share About Communicating.” Region 10 Education Service Center. <https://www.region10.org/r10website/assets/File/communicationessentialsforsuperintendents.pdf>

⁵⁴ Rothstein, E., E. Worlein, and A. Murphy. “Change Management Designed for Schools.” Atlas, March 2018. pp. 5–10. <https://www.managebac.com/files/Change-Management-Guide-for-Schools.pdf>

⁵⁵ Ibid., p. 8.

⁵⁶ Kilminster, M. “The Ultimate Guide to Managing Change in Schools.” Arbor, July 8, 2021. <https://arbor-education.com/blog-the-ultimate-guide-to-managing-change-in-schools/>

⁵⁷ Figure text reproduced nearly verbatim from: Rothstein, Worlein, and Murphy, Op. cit., pp. 8–9.

SECTION III: ENGAGE WITH EVALUATION RESULTS

This section examines strategies for analyzing the pilot data, determining next steps, and scaling the program.

ANALYZE DATA

Following the conclusion of the pilot and data collection, the pilot team or external consultant must analyze the data in order to answer the research questions, determine if the pilot met its goals, and identify next steps.⁵⁸ The pilot team should analyze the evidence in alignment with the pilot study questions and avoid conducting analyses irrelevant to the study’s purpose. If the district does not have the internal research capacity to analyze the data, the pilot team can engage the support of an external expert.⁵⁹

Districts can adopt specific procedures and tools to examine pilot study outcomes and performance and engage in ongoing data collection and improvement cycles following full curricular implementation.⁶⁰ Data analysis processes and guiding documentation can help decision-makers generate meaningful findings that translate into relevant and effective action steps.⁶¹ The ERASE framework below guides educational leaders in using data to identify goals and corresponding actions.

Figure 3.1: The ERASE Framework

E	R	A	S	E
<p>Examine Data</p> <p>Leaders review disaggregated data on performance and student outcomes. They should produce data sets and visual representations of data that can generate rich discussions.</p>	<p>Raise Questions</p> <p>Leaders interrogate data, explain what they notice, and analyze why they think disparities in outcomes or performance exist. They should be willing to challenge deeply held beliefs or assumptions as part of this dialogue.</p>	<p>Ascertain causes and solutions</p> <p>This step moves into the diagnosis of problems and review of solutions. Leaders look at available research and best practices to ensure that the scope of possibilities for improvement is known.</p>	<p>Select strategic solutions</p> <p>At this stage, leaders prioritize short- and long-term strategies identified in the prior step. These actions should be compatible with achieving desired outcomes given existing resources and constraints.</p>	<p>Evaluate</p> <p>Leaders examine data periodically and adjust practices as necessary to ensure that the issues identified through data-driven conversations are addressed. It is also important to celebrate even small successes.</p>

Source: Voices in Urban Education⁶²

⁵⁸ [1] “Learning Before Going to Scale: An Introduction to Conducting Pilot Studies,” Op. cit., p. 31. [2] “Lessons from the Field: Best Practices for Piloting Curriculum.” EdReports. p. 5. https://cdn.edreports.org/media/2021/09/Pilot_Recommendations-v1.pdf

⁵⁹ “Learning Before Going to Scale: An Introduction to Conducting Pilot Studies,” Op. cit., p. 31.

⁶⁰ [1] Balow, C. “Six Steps for School Leaders to Use Data Effectively.” Illuminate Education, June 8, 2017. <https://www.illuminateed.com/blog/2017/06/six-steps-school-leaders-use-data-effectively/> [2] “Using Data to Guide School Improvement.” North Central Regional Educational Laboratory, 2004. p. 1. <https://files.eric.ed.gov/fulltext/ED518630.pdf>




⁶¹ [1] Rouda, R. “A Framework for Effective Data Use in Schools.” Learning for Action, March 28, 2018. <http://learningforaction.com/lfa-blogpost/data-matters-framework> [2] “Strategic Planning Guide for Charter School Boards.” Colorado Charter School Institute, April 2019. pp. 3–13. <https://www.csi.state.co.us/wp-content/uploads/2019/04/CSI-Strategic-Planning-Guide.pdf>

⁶² Figure contents quoted verbatim with modifications from: Myers, L.C. and K.S. Finnigan. “Using Data to Guide Difficult Conversations around Structural Racism.” *Voices in Urban Education*, 48, 2018. pp. 41–42. <https://files.eric.ed.gov/fulltext/EJ1174512.pdf>

MAKE SCALING DECISIONS

After analyzing the data, the pilot team and district leaders should use the results to determine next steps. Scaling decisions should be based on the data analysis and discussions of successes and challenges. Regardless of what the data show, the team should consider what they learned from the pilot, successes and challenges, program strengths, and participant perceptions.⁶³ Next step decisions include abandoning the program, adapting the program, or adopting and scaling the program to full implementation. If data show the pilot did not meet the team’s goals, the team should consider abandoning it and move forward with lessons learned. If data reveal the program partially met its goal, the team should consider adapting and updating the curriculum to better fit the district’s needs and meet goals moving forward. If the program met its goals, the team should consider scaling it to full implementation.⁶⁴ Figure 3.1 highlights these three options in additional detail.

Figure 3.2: Decision Options for Scaling the Pilot

		
ADAPT	ADOPT	ABANDON
<ul style="list-style-type: none"> ▪ “It could meet our goals!” ▪ Identify changes needed to avoid challenges in the future and take necessary steps to implement those changes. 	<ul style="list-style-type: none"> ▪ “It all came together!” ▪ Determine necessary steps to scale up the initiative. ▪ Implement the initiative as-is in additional locations or systemwide. 	<ul style="list-style-type: none"> ▪ “There is limited or no evidence it could address our needs.” ▪ Decide if your data indicate the initiative is sufficient to your needs, or if the challenges are too costly to overcome. ▪ Discuss other evidence-based approaches that may achieve the desired result.

Source: Regional Educational Laboratory Appalachia, U.S. Department of Education⁶⁵

District leaders and the pilot team should establish a plan for communicating the outcomes of the pilot to school staff and the district community. In addition to sharing the overall decision, the pilot team may choose to share some highlights of the evaluation results.⁶⁶

SCALE THE PROGRAM

If the pilot data show the program met or partially met its goals, district leaders and the pilot team should consider fully scaling the program. Notably, data from the pilot study can offer critical insights into features of the program itself or the implementation process (e.g., communication, material dissemination, training) the district could adapt to promote successful full implementation.⁶⁷ The pilot team should document these changes and establish action steps for scaling the program by creating a Plan to Scale.⁶⁸ Figure 3.3, on the following page, reviews key steps for developing a plan to bring the program to scale.

⁶³ [1] “Learning Before Going to Scale: An Introduction to Conducting Pilot Studies,” Op. cit., p. 35. [2] “Activity: Pilot Next Steps - Ditch, Iterate, or Scale.” The Learning Accelerator. <https://practices.learningaccelerator.org/strategies/activity-pilot-next-steps-ditch-iterate-or-scale>

⁶⁴ [1] “Learning Before Going to Scale: An Introduction to Conducting Pilot Studies,” Op. cit., p. 35. [2] “Activity: Pilot Next Steps - Ditch, Iterate, or Scale,” Op. cit.

⁶⁵ Figure contents quoted verbatim from: “Learning Before Going to Scale: An Introduction to Conducting Pilot Studies,” Op. cit., p. 35.

⁶⁶ “Tips and Recommendations for Successfully Pilot Testing Your Program,” Op. cit., p. 3.

⁶⁷ “Activity: Pilot Next Steps - Ditch, Iterate, or Scale,” Op. cit.

⁶⁸ Ibid.






Figure 3.3: Steps to Plan for Scaling Pilot



Source: The Learning Accelerator⁶⁹

Figure 3.4 below offers additional strategies for bringing the pilot program to scale, focusing on creating structures and processes to support growth in addition to planning to scale.

Figure 3.4: Strategies for Scaling Pilot Programs

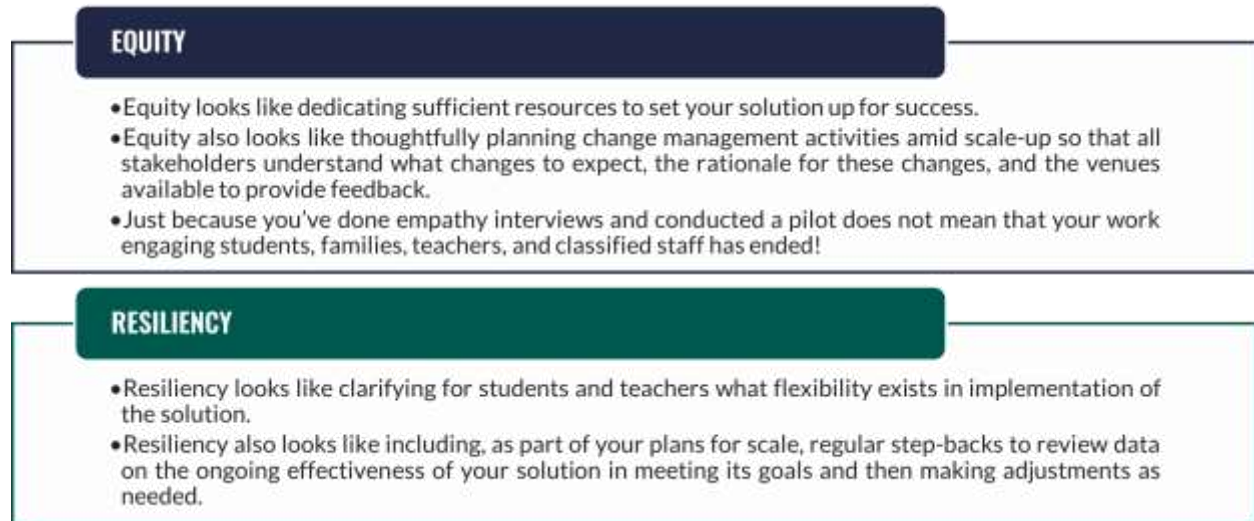
STRATEGY	DESCRIPTION
 Develop a scaling roadmap	The scaling roadmap details where, when, and in what order to expand the solution. The roadmap should lay out every single location or population the innovation will target, and detail everything.
 Develop a scaling checklist	Once you have identified where and when to scale a solution, it is important to document how you are going to introduce the innovation to each new group. A scaling checklist details the essential steps to deploy the innovation at a given site or with a given population. Generally, the items detailed in such a scaling checklist can be divided across three broad phases: (1) informing stakeholders, (2) deploying the program, and (3) sustaining program success.
 Develop shared infrastructure and common platforms	While the scaling checklist should detail every action needed to deploy the innovation to a new group of adopters, the implementation of platforms, policies, and infrastructure can serve as a foundation for scaling across all future adopter groups.
 Grow the program	With the scaling roadmap, checklist, and shared infrastructure in place, now it's time to focus on growing the network of supporters and implementers.
 Allow room for personalization	A good intervention will have to adapt to personalities, the vagaries of target populations, and the cultures of partner organizations. Decide which aspects must maintain rigid uniformity. Let other aspects evolve. Trust your partners and staff to make each program their own.

⁶⁹ Figure contents quoted verbatim from: Ibid.

Source: Deloitte⁷⁰

Furthermore, when fully scaling pilot programs, district leaders must consider how they will scale the program equitably across schools and classrooms while providing sufficient resources, as well as scale with resiliency, or including space for flexibility and adjustments.⁷¹ Figure 3.5 reviews these factors in greater detail.

Figure 3.5: Considerations for Scaling Pilot Programs: Equity and Resiliency



Source: The Learning Accelerator⁷²

⁷⁰ Figure contents quoted verbatim with slight modification from: “Success at Scale,” Op. cit., pp. 9–13.

⁷¹ “Activity: Pilot Next Steps - Ditch, Iterate, or Scale,” Op. cit.

⁷² Figure contents quoted verbatim from: Ibid.

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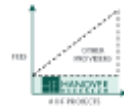
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