

# Teaching Conditions Matter

## Breakout Session

Improving Teaching Conditions:  
Planning and Implementation  
Strategies to Foster Success

May 2016



Center on  
**GREAT TEACHERS & LEADERS**

at American Institutes for Research ■



NORTHEAST COMPREHENSIVE CENTER

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# Introduction

## The Role of Monitoring in Implementation Planning

# Agenda

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- Introduction (10 minutes)
- Leading and Lagging Indicators Activities (20 minutes)
- Developing a Monitoring Plan Activity (20–25 minutes)
- Closing/Exit Ticket (3–5 minutes)



# Session Objectives

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Build awareness of best practices in monitoring implementation of teaching conditions strategies, including:

- Identifying key leading and lagging indicators to monitor progress
- Engaging in early monitoring plan development, including interim benchmarks
- Considering appropriate monitoring and reflection questions

# Why Do We Monitor Progress?

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# Warm-Up Activity

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Think about the strategy your team selected to work toward improving teaching conditions in your district.

- How do you know whether your strategy is on the right track?

*Turn and share with your partner.*

# Equitable Access Implementation Playbook

Home » Learning Hub » [Equitable Access Supports](#)

## IMPLEMENTATION PLAYBOOK



### Implementation Playbook



Start the process of implementation with this step-by-step tool designed to support you wherever you are in the implementation process. Use this resource to assess community awareness about your equity plan, identify a project leader and team to implement your equity plan strategies, assess current levels of implementation, clarify leading indicators of success, create a project management plan, and act on the plan.

[Download Implementation Planning Tool >>](#)

### IMPLEMENTATION PLAYBOOK

EQUITABLE  
ACCESS TOOLKIT



# Strategy Implementation

STEP 1.

Plan for community awareness.

STEP 2.

Identify a project leader and team.

STEP 3.

Assess current levels of implementation.

STEP 4.

Clarify leading indicators.

STEP 5.

Create a project management plan.

STEP 6.

Act on the plan and monitor progress.

# Identifying Leading Indicators



# Leading Indicators Versus Lagging Indicators

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- **Lagging indicators are summative**—they are longer term outcomes that enable us to reflect on the impact of a strategy.
- **Leading indicators are formative**—they enable us to track progress along the way and make course corrections as needed.

Foley et al., n.d.

# What Are Leading Indicators?

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Leading indicators are signals developed from the systematic collection and analysis of data that enable the state to better predict and even impact outcomes.

Leading indicators are:

- Timely and actionable
- Benchmarked
- Powerful

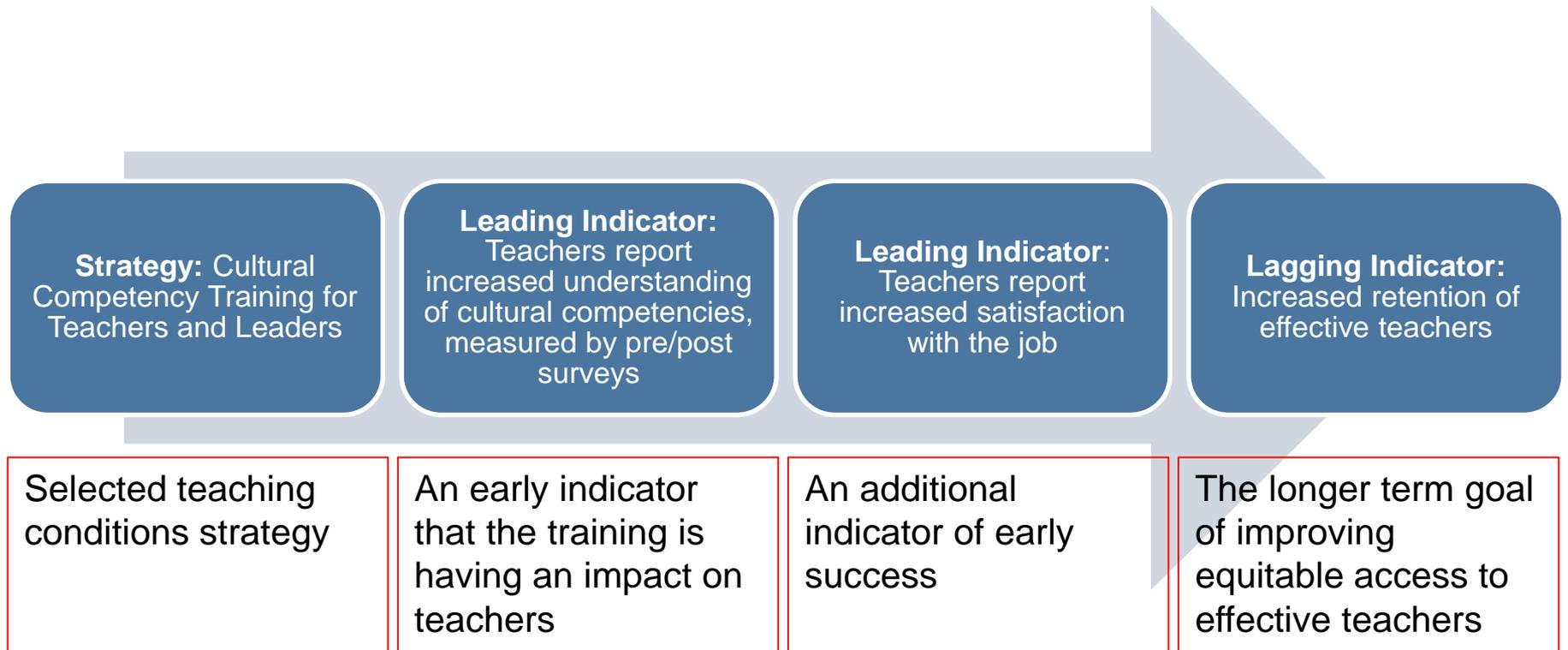
Foley et al., n.d.

# Leading and Lagging Indicators for Mr. Emily

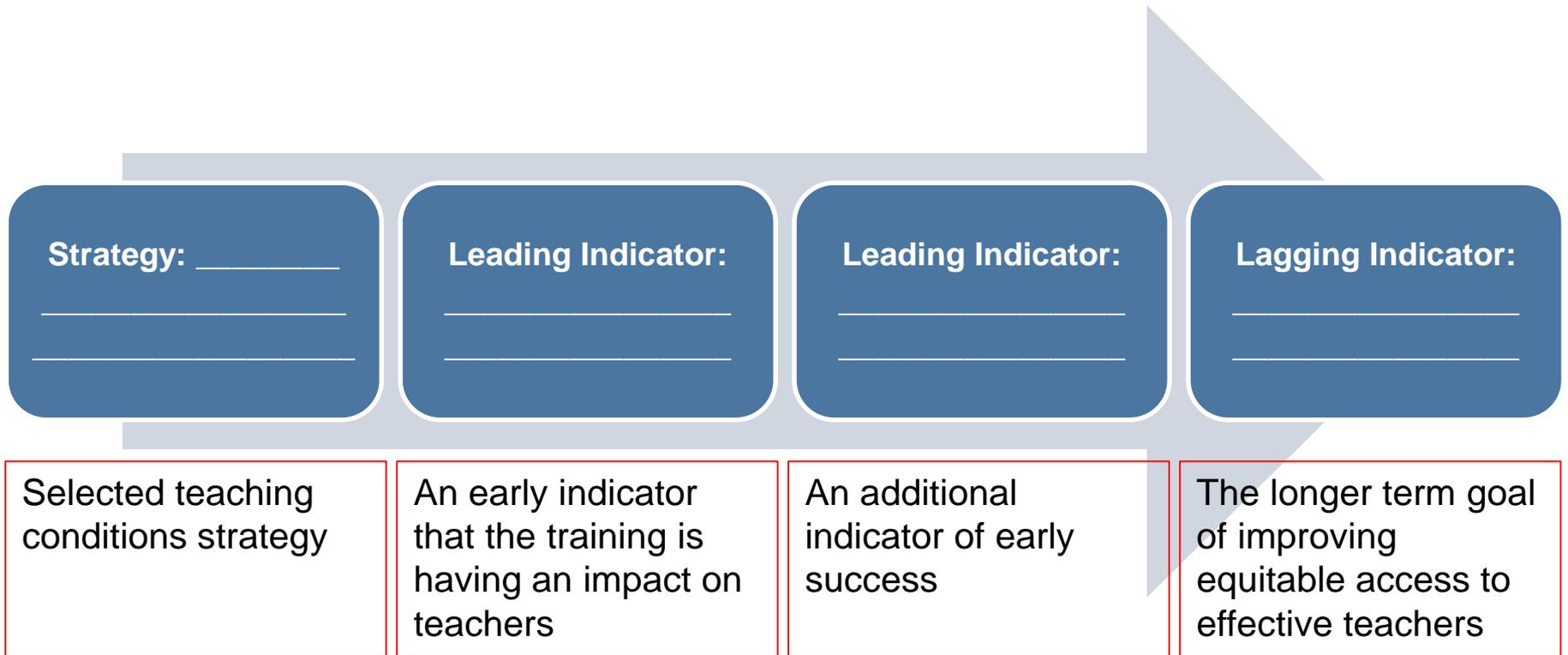
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# Example of Leading and Lagging Indicators for Equity Strategies



# What Are Leading and Lagging Indicators for Your Strategy?



## Long-Term Equity Goal

*(Lagging indicators that reflect our big-picture goal)*

By the 2017–18 school year, our district will increase retention of effective teachers by 15% (from 60% up to 75%)

## Leading Indicators

*(Shorter term goals that help us know our strategies are working)*

3 cultural competency trainings are scheduled during 2016–17 school year

75% of teachers in the district attend all 3 trainings

75% of teachers report (via pre/post surveys) improved understanding of cultural competencies after attending trainings

## Action Steps and Measurable Responsibilities

*(Action steps that are taken to reach our goals)*

Contracts department solicits vendor applications for cultural competency trainings, hires vendor, and schedules trainings

Communications team develops recruitment plan for training and conducts outreach to teachers in district, incentivizing participation with PD credits

Research department conducts pre/post surveys of participants to understand the impact of the trainings on teacher learning

## Long-Term Equity Goal

*(Lagging indicators that reflect our big-picture goal)*



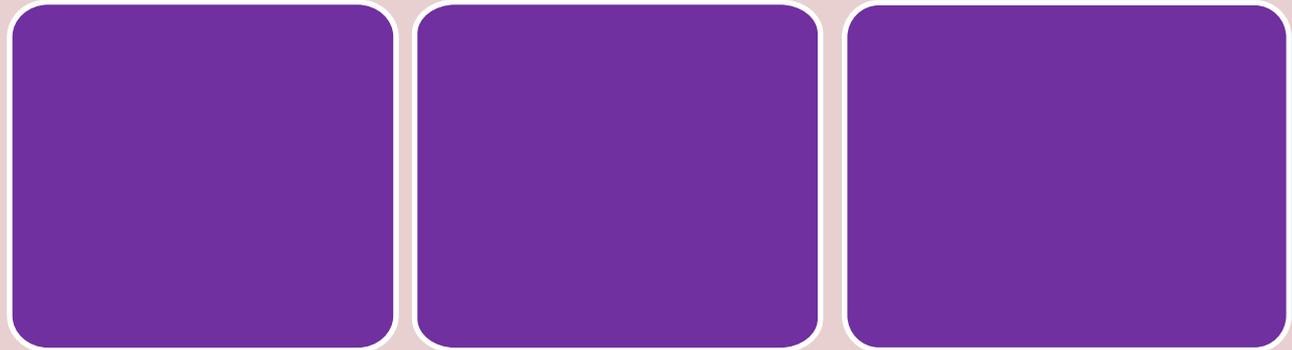
## Leading Indicators

*(Shorter term goals that help us know our strategies are working)*



## Strategies and Measurable Responsibilities

*(Action steps that are taken to reach our goals)*



# Using Leading and Lagging Indicators to Develop a Monitoring Plan

## STEP 6. Act on the Plan and Monitor Progress



### Monitoring Tools

Determine why some strategies worked and others did not and how to develop action steps to improve outcomes through a strong plan to monitor the implementation progress of your equity plan strategies.

# Overview of the Monitoring Process

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**Step 1. Establish a monitoring plan** to include long-term goals (lagging indicators) and shorter term goals (leading indicators).

**Step 2. Monitor progress** toward your goals.

**Step 3. Reflect on successes and “course correct”** as needed.

# Step 1. Establish a Monitoring Plan

## Activity 3. Developing a Monitoring Plan

Note: Participants will begin to complete Step 1 in today's session and may complete Step 1 with their team at a later date. Steps 2 and 3 are intended to be used after implementation is under way, to monitor progress.

|   |   |  |  |  |
|---|---|--|--|--|
| <b>Strategy, Goal, and Leading Indicator(s)</b> | Name of Strategy  |  |  |  |
|   | Long-Term Goal of Strategy (Lagging Indicator)  |  |  |  |
|   | Leading Indicator(s)  |  |  |  |
| <b>Step 1. Establish a Monitoring Plan</b>      | How often will our team monitor progress toward each leading indicator?   |  |  |  |
|   | What evidence will we collect of our progress toward each leading indicator?  |  |  |  |
|   | How will we know we are on track toward meeting our long-term goal?   |  |  |  |
|   | What are our interim benchmarks? ( <i>Adjust time intervals as needed to match monitoring intervals.</i> )                    |  |  |  |
|   | <i>Three-month benchmark</i>  |  |  |  |
|   | <i>Six-month benchmark</i>  |  |  |  |
|   | <i>One-year benchmark</i>   |  |  |  |
|   | <i>Two-year benchmark</i>   |  |  |  |
|   | What might we do to course correct if we are not on track to meet our long-term goal according to the benchmarks established? |  |  |  |
|   | Who will be responsible for monitoring progress for this indicator?   |  |  |  |

# Step 2. Monitor Progress

|   |  |  |  |  |
|---|--|--|--|--|
| <b>Step 2. Monitor Progress and Identify Evidence</b> | What is the monitoring interval (for example, three months, six months)?   |  |  |  |
|   | Did our team do what was planned in our strategy?  |  |  |  |
|   | How do we know? What is the evidence—meeting agendas, data collection, other artifacts or evidence?                      |  |  |  |
|   | How much progress have we made toward our goal?  |  |  |  |
|   | Do we need to make any adjustments at this time? <i>(Indicate yes or no. If no, planning will take place in Step 3.)</i> |  |  |  |

# Step 3. Reflect and Course Correct

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- Were the planned action steps in the strategy actually implemented?
- What evidence supports the determination that the strategy or planned actions were implemented or not implemented?
- Was the implementation partial or complete (i.e., Were key aspects of the strategy omitted, or were all aspects of the strategy implemented as planned?)?
- What factors either supported or hindered implementation of the strategy or planned action steps, and how did these factors affect the outcomes?

# Step 3. Reflect and Course Correct

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- Were resources (funds, personnel, time, knowledge, willingness, other resources) sufficient to ensure successful implementation of the strategy or planned action steps?
- Was it possible (i.e., realistic) to obtain and evaluate outcomes from implementation of the strategy or planned action steps during the designated monitoring interval (such as recruitment and retention of experienced, qualified, effective educators)?

# Step 3. Reflect and Course Correct

|  |   |  |  |  |
|--|---|--|--|--|
| <b>Step 3. Self-Correct<br/>and Course<br/>Correct as Needed</b> | What went wrong? <i>(Use the self-reflection questions in this section to guide the answer.)</i>  |  |  |  |
|  | Would the course corrections we noted in Step 1 help get our team back on track?<br><i>Revisit the possible course corrections from the monitoring plan (Step 1).</i> |  |  |  |
|  | What will we do to course correct?  |  |  |  |
|  | What new benchmarks will we establish for monitoring progress as needed?  |  |  |  |
|  | <i>Three-month benchmark</i>  |  |  |  |
|  | <i>Six-month benchmark</i>  |  |  |  |
|  | <i>One-year benchmark</i>   |  |  |  |
|  | <i>Two-year benchmark</i>   |  |  |  |

# If the Strategy Implementation Was Not Successful...

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- Communication
- Strategy drift
- Lack of training and support
- Unintended consequences
- Wrong strategy



# Unsuccessful Implementation for Mr. Emily's Weight Loss Plan

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# Monitoring Plan Example

## Session Handout: Teaching Conditions Matter, Work Session II

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### Monitoring Plan Example

|   |   |  |  |   |
|---|---|--|--|---|
| <b>Strategy, Goal, and Leading Indicator(s)</b> | Name of Strategy  | <i>Cultural Competency Training Series</i>   |  |   |
|   | Long-Term Goal of Strategy (Lagging Indicator)  | <i>By the 2017–18 school year, our district will increase retention of effective teachers by 15% (from 60% up to 75%)</i>  |  |   |
|   | Leading Indicator(s)  | <i>3 cultural competency trainings are scheduled during 2016–17 school year</i>  | <i>75% of teachers attend all 3 trainings</i>  | <i>75% of teachers report (via pre/post surveys) improved understanding of cultural competencies after attending all 3 trainings</i>  |
| <b>Step 1. Establish a Monitoring Plan</b>      | How often will our team monitor progress toward each leading indicator?                           | <i>Weekly team check-ins to oversee RFP and selection process</i>  | <i>Weekly registration monitoring</i>  | <i>Before and after each training (3 trainings per year)</i>  |
|   | What evidence will we collect of our progress toward each leading indicator?                      | <ul style="list-style-type: none"> <li><i>Contracts team puts out RFP for PD vendors</i></li> <li><i>Proposals reviewed</i></li> <li><i>Vendor selected and contract executed statement of work/training plan</i></li> </ul> | <i>Recruitment messaging drafted</i><br><i>Contact list compiled</i><br><i>Outreach conducted</i><br><i>Regular oversight of registration list</i><br><i>Follow-up recruitment as needed</i> | <i>Develop quick 3–5 minute pre/post surveys (electronic or paper?)</i><br><i>Consider unique identifiers for each respondent to track individual progress</i><br><i>Administer surveys at the start and finish of each of the 3 sessions</i><br><i>Track responses and report data</i> |
|   | How will we know we are on track toward meeting our long-term goal?                               | <i>Above steps completed on planned timeline—see benchmarks below—3 trainings scheduled for 2016–17</i>  | <i>Above steps completed on planned timeline—see benchmarks below—a high participation rate will be key to increasing learning by teachers</i>   | <i>We should see some improvement in learning after each session, with more growth over time. We should ask same questions each time so that we can see growth.</i>   |
|   | What are our interim benchmarks? (Adjust time intervals as needed to match monitoring intervals.) |  |  |   |
|   | <i>Summer 2016 Benchmark</i>  | <i>RFP issued</i><br><i>Proposals reviewed</i>   | <i>Draft recruitment message</i><br><i>Compile contact list</i>  | <i>Survey(s) developed</i><br><i>Administer Survey 1</i>  |



# Activity: Begin Developing Your Team's Monitoring Plan

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- How often will our team monitor progress toward each leading indicator?
- What evidence will we collect of our progress toward each leading indicator?
- How will we know we are on track toward meeting our long-term goal?
- What are our interim benchmarks?
- What might we do to course correct if we are not on track to meet our long-term goal according to the benchmarks established?

# Closing: Exit Ticket

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- What was the most helpful thing about today's session?
- What could be improved?
- What do you still want to know more about?



# Reference

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Foley, E., Mishook, J., Thompson, J., Kubiak, M., Supovitz, J. & Rhude-Faust, M. K. (n.d.). *Beyond test scores: Leading indicators for education*. Providence, RI: Annenberg Institute for School Reform at Brown University.  
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Dana Chambers  
[dchambers@air.org](mailto:dchambers@air.org)

1000 Thomas Jefferson Street NW  
Washington, DC 20007-3835  
877-322-8700  
[www.gtlcenter.org](http://www.gtlcenter.org)  
[gtlcenter@air.org](mailto:gtlcenter@air.org)

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