

California Comprehensive Center



School Visitations in Four California Counties: Experiences and Lessons Learned From Year Two

Mette Huberman, Patrice Fabel, Melissa Arellanes & Tom Parrish
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Executive Summary

The purpose of this project was to match lower and higher performing schools with similar demographics and, through school visits, to create opportunities for knowledge sharing around effective schooling practices. The project built on previous work by the American Institutes for Research (AIR) as part of the California Comprehensive Center (CA CC) to profile high-performing, high-need schools and districts. It also aligns with existing efforts by EdResults through their matching-schools website, Edutopia's work to disseminate successful school practices, and the type of partnership demonstrated by Fresno and Long Beach Unified School Districts. This report summarizes the experiences and lessons learned in the second year of this two-year project.

The project began in the 2009–10 school year, when Fresno, San Joaquin, Santa Clara, Shasta, and Sonoma counties participated in a pilot project to facilitate school visitations between lower and higher performing schools. Through the CA CC, AIR provided data to match schools, facilitated the overall process, and documented the effort through interviews, observations, and a summary report that included recommendations on how to improve the process. The CA CC also provided a \$10,000 stipend to each participating county to assist in the process.

With the recommendations from the pilot project in mind, four of these counties (all but San Joaquin) agreed to participate in the second project year, 2010–11. Again AIR, as part of the CA CC, provided data to match schools, facilitated the overall process, and documented the effort through interviews and observations, as well as online surveys of all participating school and district staff. A somewhat smaller stipend of \$7,000 was provided by the CA CC during this second year because of funding limitations.

During this second year, a total of 39 schools (21 visiting schools and 18 host schools) participated in the school visitation process. The 21 visiting schools included 15 elementary schools, 4 middle schools, and 2 high schools. Each county carried out four visits and used the school visitation process as part of its school- and/or district-improvement process, mostly through one-on-one matching between lower and higher performing schools.

Based on surveys administered to all second-year school and district participants, about three quarters of all respondents (73 percent) reported these activities to be either very useful or useful. Visitors reported classroom observations to be most useful, indicating that these observations allowed them to observe specific strategies, practices, and programs that contributed to the host schools' success. A majority of the host participants (71 percent) reported discussions and feedback from the visitors to be the most useful activity, indicating that these activities allowed them to reflect on their practices and validated what they were doing. However, both visitors and hosts reported that they would like to see more preparation before the visits, discussions during the visits, and follow-up after the visits.

About two fifths of the visiting participants (38 percent to 41 percent) reported positive effects from the school visit activities in the areas of new programs and procedures (e.g., English learner [EL] programs) and teachers' instructional strategies (e.g., student engagement strategies). In addition, almost all participants (91 percent) expressed interest in participating in similar activities in the future.

Based on these survey findings, as well as interviews with county staff and observations from visits to a sample of sites, we propose 18 "best practices" for how to carry out the school visitation process in the following 6 general areas: 1) Timing of school visitations; 2) County and district involvement; 3) School matching process; 4) School visit preparation; 5) School visit activities; and 6) Debriefing and follow-up activities. We also recommend that the California Department of Education consider making the school visitation process a part of its overall school- and district-improvement strategy.

Contents

Acknowledgements	ii
Executive Summary	iii
Introduction	1
Project Background.....	2
Revised School-Matching Methodology.....	3
Documentation Efforts	4
Monthly Calls.....	5
County Lead Interviews.....	6
Online Surveys	6
School Observations.....	7
Implementation of the School Visitation Process	7
Overview of County Approaches	8
Use of Funds.....	9
Level of County Involvement.....	9
Level of District Involvement	9
School-Matching Process	9
School Visit Preparation	10
School Visit Activities	12
Follow-Up Activities	16
Impact of the School Visits.....	17
Usefulness of Activities	17
Impact on Participants and Schools.....	19
Participants' Interest in Future Participation and Suggestions for Improvements.....	21
Summary of Findings	23
Recommendations for Best Practices	23
Policy Implications	25
Appendix A: School-Matching Request Form.....	26
Appendix B: Example of School-Matching Report.....	28
Appendix C: School Visitation Plan Template	35
Appendix D: Host-School Screening Questions	38
Appendix E: Tips for School Visitation Process	42
Appendix F: Instructional Rounds Protocol.....	47
Appendix G: Instructional Rounds After-Action Review.....	54

Introduction

In the 2009–10 school year, American Institutes for Research (AIR), as a partner in the California Comprehensive Center (CA CC) at WestEd, carried out a pilot project in five counties (Fresno, San Joaquin, Santa Clara, Shasta, and Sonoma). The purpose of the pilot project was to match lower and higher performing schools with similar demographics and to establish, through school visits, opportunities for sharing effective practices.

Through the CA CC, AIR provided data to match schools, facilitated the overall process, and documented the effort through interviews, observations, and a summary report.¹ The CA CC also provided a \$10,000 stipend to each participating county to facilitate the process. The counties arranged between three and five school visits each, and a total of 20 lower performing schools participated in the process. There was a wide range of approaches and levels of involvement, but most counties were involved in contacting districts and schools and helped to prepare for and carry out the visits.

Participants reported that the most useful part of the process was the opportunity to observe different teaching techniques and instructional styles in higher performing schools. The timing of the visits, which were conducted late in the school year during testing and spring break, was cited as least helpful. Nevertheless, participants noted some positive effects, such as emerging changes in teacher attitudes and instructional changes that would be implemented the next year. In addition, most of the visiting-school participants who were interviewed for the project expressed interest in participating in visitation activities in the future.

Based on these findings and our observations, we proposed the following recommendations to improve the process:

- Implement the school visitation activities earlier in the school year.
- Improve the school-matching process by providing clearer data, assessing leadership capacity and motivation among visitors and hosts, and ensuring the best match between visiting-school needs and host-school strengths.
- Ensure consistent county involvement throughout the process and increase district involvement, in particular among districts associated with the lower performing schools.
- Improve school visit preparation by developing a schedule for the visit, developing a set of guiding questions, reviewing background information and data on the host schools, and carefully choosing the visiting team members.
- Enhance school visit activities by making the visits last at least three hours and by providing more opportunities for visiting- and host-teacher interaction in addition to classroom observations.
- Ensure consistent implementation of school visit debriefings and follow-up by county and district administrators.

With these recommendations in mind, four of the five counties (Fresno, Santa Clara, Shasta, and Sonoma) agreed to participate in a second year of school visitations during the 2010–11 school year. Again AIR, as part of the CA CC, provided data to match schools; facilitated the overall process; and documented the effort through interviews, observations, and online surveys of all participating school and district staff. The CA CC provided a somewhat smaller stipend of \$7,000 because of funding limitations. In the second year, the counties arranged four school visits each; 21 visiting and 19 host schools participated in the process.

¹ Huberman, M. et al. (2010). *School Partnerships in Five California Counties: Experiences and Lessons from a Pilot Study*. San Francisco, CA: California Comprehensive Center at WestEd.

The purpose of this report is to summarize the experiences and lessons learned from the efforts in Year Two across the four counties. We first describe the revised methods used for school matching and then the process we used to document the school visitation process in the second year. Subsequently, we describe the implementation and impact of the school visits. We conclude with recommendations for best practices and possible policy implications.

Project Background

An important question facing education policymakers is how to improve low-performing schools. On average, these schools enroll disproportionately high percentages of at-risk students, e.g., students in poverty or ELs. At the same time, a number of these “high-need” schools show much higher levels of performance than their counterparts with similar demographics. By matching lower performing, high-need schools with demographically similar higher performing schools, this project aims to promote knowledge sharing around effective schooling practices.

As a partner in the CA CC at WestEd, AIR has developed a data-driven selection process for identifying California schools demonstrating substantially higher academic outcomes than similar schools (for all students as well as for specific subgroups). We have profiled 15 of these schools through site visits and interviews with school staff.² In addition, we have highlighted these high-performing, high-need schools through webinars³ and presentations.

The ideas underlying this project are not new and draw on work in these areas being done by other organizations. The project joins others in learning more about how to assist academically at-risk students and the schools they attend by identifying and learning from high-performing, high-need schools and districts. For example, EdResults has a well-established, publicly accessible website for specifying school characteristics and comparing performance.⁴ Edutopia is a national nonprofit organization with a mission to identify and disseminate local practices employed in successful schools.⁵ In California, the Fresno–Long Beach Learning Visitation provides a positive example of what can be gained through visitations between school districts.⁶ Last, the appeal of school visitations is exemplified through the experience of Sanger Unified School District in Fresno County, which hosts numerous visitors from schools and districts wanting to learn from its success (including visits as a part of this project).

This project is based on the belief that success stories exist in every county and that efforts to identify and disseminate them can foster learning communities of schools and districts throughout California. Just as learning communities among teachers are encouraged and have been found to be an important ingredient to school success, we believe that similar benefits can be achieved through learning communities of schools and districts.

Guidance on best practices for carrying out school visitations is generally lacking in the literature. However, one strong example of such guidance was produced by the Comprehensive School Reform

² The school profiles can be found at: <http://www.schoolsmovingup.net/cs/smu/print/htdocs/smu/ideas/schools.htm>

³ For example, see: <http://www.schoolsmovingup.net/cs/smu/view/e/3368>

⁴ See the Educational Results Partnership website: <http://edresults.org/index.php>

⁵ For examples of these practices, see Edutopia: <http://www.edutopia.org/schools-that-work>. Other examples to identify and learn from high-performing schools are Education Trust: <http://www.edtrust.org/dc/resources/success-stories>, and WestEd: http://www.wested.org/online_pubs/gf-07-02.pdf.

⁶ See the second in a series of briefs describing the partnership: http://www.cacollaborative.org/Portals/0/cafiles/CA_Collaborative_Fresno_LB_Brief2.pdf

Quality Center in 2006.⁷ In addition, a fairly new approach called “instructional rounds,” inspired by practice in the medical field, is gaining popularity across the country as a way to structure school visits and share best practices.⁸ The purpose of instructional rounds is to help education leaders and practitioners develop a shared understanding of what high-quality instruction looks like and what schools and districts can do to support it. The host school identifies a “problem of practice” (e.g., consistent use of academic language) and presents this to staff from visiting schools. Through classroom observations, visitors then “collect evidence” around the problem of practice, focusing on what students and teachers are doing and saying and what the task is. Subsequently, the visitors “analyze the evidence” by categorizing and discussing their classroom observation notes with each other and with the host school (and district) staff. Through this process, educators develop a shared practice of observing, discussing, and analyzing learning and teaching. The instructional rounds model was used by one of the counties (Sonoma) as part of this project.

Revised School-Matching Methodology

The idea behind matching lower and higher performing schools that are otherwise similar is to create learning opportunities for educators and school leaders. The objective is to provide concrete examples of strategies that have worked in similar school settings. It is based on the premise that lower performing schools may be most inspired to learn from schools that are similar to them in terms of school type and student characteristics. That said, it should be noted that neither lower nor higher performing schools are necessarily consistent in their performance. For example, a lower performing school may have high-performing teachers, and vice versa. Thus, a two-way learning process where schools can learn from each other is ideal.

In the project’s first year, we emphasized the matching of school demographics and defined a higher performing school as having a school achievement index (SAI, i.e., actual performance minus predicted performance as calculated by a regression analysis)⁹ greater than that of the lower performing school based on the most recent year of data (2008–09). This year, we placed less emphasis on strict matching based on demographic similarity and more emphasis on identifying high-performing schools by creating wide demographic cutoffs and ranking schools on their SAI during a four-year period (from 2006–07 to 2009–10). Thus, we adjusted our performance criteria this year to focus on the average of the last four years of performance data, rather than a single year of data, to obtain a more reliable and stable measure of a school’s academic performance.

We began providing information on higher and lower performing school matches to the counties as early as October 2010 and continued this data-sharing process through January 2011. The four counties selected lower performing schools within their counties and requested that we identify higher performing matches based on certain demographic criteria within one or more Regional System of District and School Support (RSDSS) or CCSESA regions¹⁰ of their choosing. We developed a school-matching request form

⁷ Comprehensive School Reform Quality Center. (2006). *Seeing Improvements: A Guide to Visiting Schools That Use Whole School Improvement Models and Promising Practices*. Washington, DC: Author. Retrieved from: http://www.csrq.org/documents/SeeingImprovement81606_FINAL.pdf

⁸ See: City, E., Elmore, R., Fiarman, S. & Teitel, L. (2009). *Instructional Rounds in Education: A Network Approach to Improving Teaching and Learning*, Cambridge, MA: Harvard Education Press.

⁹ This index is a measure AIR has created through the CA CC for the purpose of this project and other efforts to identify and feature high-performing, high-needs schools. For more information on the type of regression analysis used, see: http://www.schoolsmovingup.net/pdf/CA_CC_High_Perf_Schools_Criteria2009.pdf

¹⁰ The RSDSS regions represent the 11 county superintendent regions identified by the CCSESA. Each region has an RSDSS Director who operates out of one of the COEs in each region. The CA CC facilitates the dissemination of resources and information via the RSDSS.

(see Appendix A) that allowed counties to list all selected lower performing schools and indicate the most important matching criteria. We requested that counties select no more than two criteria in order to increase the pool of potential higher performing schools. Counties could request school matches based on the percentage of students with particular ethnicities, poverty levels, and EL and disability status; school size; and grade levels. Most counties requested that the lower performing schools be matched on poverty (or percentage of students eligible for free or reduced-price lunch), percentage of ELs, and school size. One county also wanted to ensure that the matched higher performing schools were not in Program Improvement (PI) for the current year.

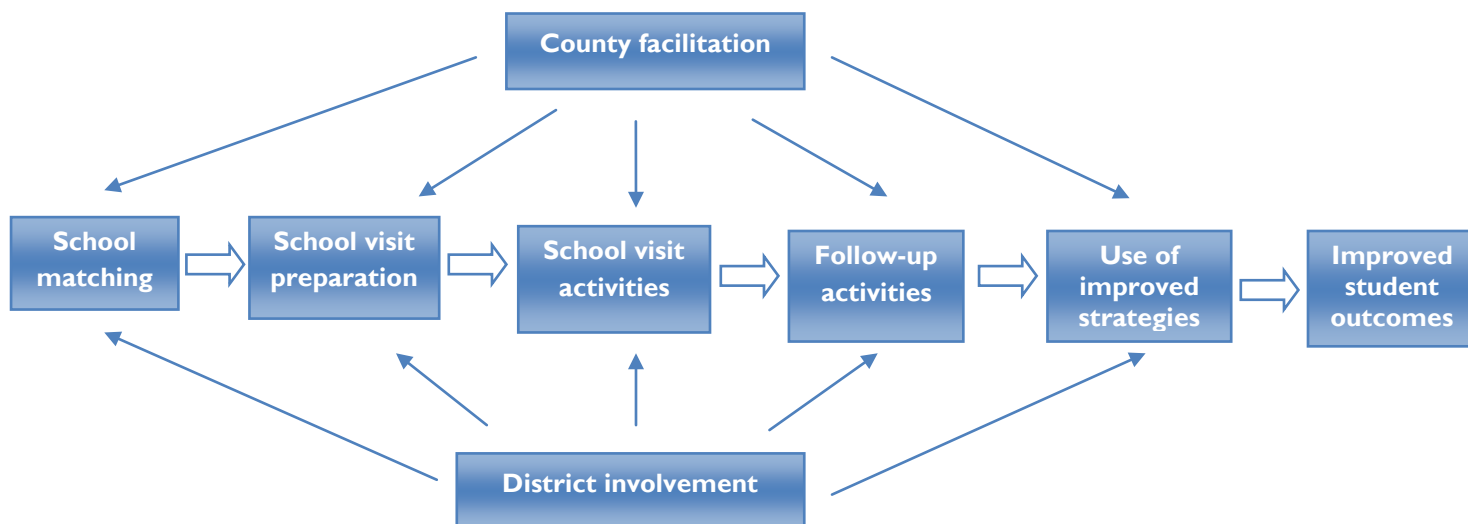
To provide matches, we first limited the pool of potential higher performing schools to only those that were of the same school type (elementary, middle, or high school) and in the same region (as designated by the county) as the lower performing school. Next, if counties requested matches based on demographic criteria, we created a cutoff for each demographic criterion that was the lower of either the average in the specified geographic location or 10 percentage points below the lower performing school. For example, if a lower performing school's percentage of students in poverty is 45 percent and the average percentage of students in poverty in the school's region is 70 percent, we would exclude schools with a percentage of students in poverty below 35 percent (10 percentage points below the lower performing school). For matching on school size, schools were excluded if their enrollment was less than half or more than twice the size of the lower performing school. Schools were excluded for grade-span matches if their grade span was different from the lower performing school by more than two grade levels (unless the lower performing school had an atypical grade span). The selected higher performing schools were the 10 schools with the highest SAI. For each identified lower performing school, we created a report that summarized the 10 higher performing schools' achievement and demographic information (see Appendix B).

In some instances, the specified criteria were so stringent that very few high-performing school matches were generated. In such cases, we provided the counties with alternative schools that did not meet all matching criteria but were high performing. As mentioned above, we emphasized performance over demographic similarity this year in our matching of lower and higher performing schools.

Documentation Efforts

Through our documentation efforts last year, we developed recommendations for how to improve the process in the following areas: 1) the school matching process; 2) county and district involvement; 3) school visit preparation; 4) school visit activities; and 5) follow-up activities. Exhibit I illustrates the different aspects and outcomes of the ideal school visitation process and how they relate to each other.

Exhibit I: School Visitation Process



Similar to last year, the purpose of the effort to document the school visitations was to record the experiences and lessons learned about school matching and knowledge transfer between schools across the four counties, with an emphasis on documenting best practices. The main documentation questions were the following:

- **How was the school visitation process implemented?**
 - What were the overall approaches used by the counties?
 - How many school visits did the counties plan, and how many did they carry out?
 - How did the counties use the stipend?
 - How involved were the counties and districts in the process?
 - How were visiting and host schools matched in each county?
 - How did the visiting and host participants prepare for the school visits?
 - What activities did the school visits entail?
 - What follow-up activities took place?

- **What was the impact of the school visitation process?**
 - How useful were the school visits to participants? What was most useful, what was least useful, and why?
 - What was the impact, if any, on participants and their schools?
 - Would participants be interested in participating in similar activities in the future?
 - How could the process be improved to make it more useful?

To answer these questions, we carried out the following documentation activities: monthly calls with county leads, a final interview with county leads, surveys of all school and district participants, and observations of selected school visits.

Monthly Calls

One of the lessons learned from last year was to begin the process earlier in the school year to avoid conducting school visits during the spring, when schools are either busy with testing or on spring break. Thus, we began the planning process with the counties as early as September and started facilitating

monthly conference calls in October 2010. We also decided to create more structure in the process, so the counties were asked to write a brief plan outlining their overall goals, intended outcomes, approach, and proposed budget. The CA CC was able to fund each county slightly less than last year, \$7,000 versus \$10,000, to facilitate the school visits unless the county had carry-over funds from the previous year. In these cases, the budget was prorated to take carry-over into account.

The monthly calls continued through May 2011. Discussions included topics such as school matching, school visit preparation, school visit activities, school visit follow-up, successes, and challenges. In the final conference call, we also discussed overall impacts and lessons learned. Similar to last year, these calls developed into a learning community where counties were able to share strategies and tools with each other. For example, counties shared tips for setting up school visits, questions for host principals, a school visit protocol, and a debriefing document (see Appendices D–G). These tools, along with meeting agendas and minutes, also were shared on an online community we created on the Brokers of Expertise website.

County Lead Interviews

In June 2011, we conducted a one-hour phone interview with each county lead (or leads) to gather more in-depth information about the implementation and impact of the school visitation activities in their county. Six respondents were interviewed—five county administrators and one district administrator (who led the process in Sonoma County). The five county administrators included one assistant superintendent of instruction, one chief academic officer of educational services, two directors of school and district support, and one coordinator of English language arts, history, and social science. The district administrator was a curriculum director who had served as a county administrator the previous year as part of this project. County leads had between one and six years of experience in their current positions.

Online Surveys

Last year, we conducted a sample of 21 participant phone interviews. This year, to get a sense of the full range of experiences, we administered an online survey to all participants, including visiting and host teachers, principals, and district administrators. County leads provided the names of all participants, their titles, and email addresses. Between March and May 2011, we administered surveys to 166 participants across the four counties.

The survey covered the following topics:

- Respondent background
- School visit preparation
- School visit activities
- Follow-up activities
- Impact of the school visits
- County and district involvement
- Improvements to the process

It was designed to be short (requiring 5–10 minutes to complete) in the hope of increasing the response rate. Participants were invited to take the survey through an email invitation and were sent three email reminders during a three-week period if they did not respond. Subsequently, we sent names of nonrespondents to the county leads and asked them to follow-up with these participants by email, phone, or both. The final response rate was 49 percent across the four counties (see Exhibit 2).

Exhibit 2: Survey Response Rates by County

County Name	Surveys Distributed	Surveys Received	Response Rate
Fresno	23	13	57%
Santa Clara	46	24	52%
Shasta	41	19	46%
Sonoma	56	25	45%
All	166	81	49%

The 81 survey respondents included 51 teachers, 20 principals, and 10 district administrators in the following categories:

- 44 teachers from visiting schools (54 percent of the respondent sample)
- 7 teachers from host schools (9 percent of the respondent sample)
- 11 principals from visiting schools (14 percent of the respondent sample)
- 9 principals from host schools (11 percent of the respondent sample)
- 8 district administrators associated with visiting schools (10 percent of the respondent sample)
- 2 district administrators associated with host schools (2 percent of the respondent sample)

Thus, more than half of the sample (54 percent) comprised visiting teachers, about one quarter (24 percent) were other visitors, and the remaining respondents (22 percent) were hosts.¹¹ The respondents' length of tenure in their current positions varied, with about half of the sample (54 percent) having less than six years in their current position and the other half (46 percent) having six or more years. Generally, teachers tended to have longer tenures than principals and district administrators.

School Observations

In February and March 2011, we observed school visits in three of the four counties.¹² Two of the school visits took place at elementary schools (Fresno and Shasta) and one was at a middle school (Santa Clara).

Implementation of the School Visitation Process

In this section we answer the following questions:

- What were the overall approaches used by the counties?
- How many school visits did the counties plan, and how many did they carry out?
- How did the counties use the stipend?
- How involved were the counties and districts in the process?
- How were visiting and host schools matched in each county?
- How did the visiting and host participants prepare for the school visits?

¹¹ These subgroup sample sizes are by and large comparable to the percentage of surveys distributed in each group: 39 percent were distributed to visiting teachers, 31 percent to other visitors, and 30 percent to hosts. Thus, somewhat more visiting teachers (54 percent) responded to the survey compared to the percentage of these teachers who were surveyed (39 percent), and slightly fewer other visitors (24 percent) and hosts (22 percent) responded compared to the ones who were surveyed (31 percent and 30 percent, respectively).

¹² We were unfortunately not able to schedule an observation of a visit in Sonoma County this year due to scheduling conflicts.

- What activities did the school visits entail?
- What follow-up activities took place?

Overview of County Approaches

The four counties used the school visitation process as part of their school- and/or district-improvement process, mostly through one-on-one matching between lower and higher performing schools. A majority of the lower performing schools were in some stage of Program Improvement (PI). Each county carried out four visits between December 2010 and May 2011 (with the majority being completed before April 1, 2011): 10 visits were conducted within the counties' own borders and 6 visits took place in other counties. A total of 39 schools (21 visiting schools and 18 host schools) participated in the process, for a total of 166 participants (not including county office staff). The 21 visiting schools included 15 elementary schools (three of these were K–8 schools), 4 middle schools, and 2 high schools.

To provide more structure for the process this year, the CA CC created a school visitation plan template that the counties completed at the beginning of the process. The template listed the responsibilities of the CA CC and the counties; asked the counties to specify their project goal, intended outcomes, and project approach; and requested a budget (see Appendix C).

The counties used a variety of approaches. These are summarized below for each county.

Fresno County. Fresno County organized four visits within the county. Two elementary schools in PI visited four higher performing schools, making two visits each. The county's plan was to conduct four visits with four schools (two elementary and two middle schools), but the county was never able to engage the middle schools due to internal problems on these campuses (e.g., one of the school's districts was taken over by the state).

Santa Clara County. In Santa Clara County, the school visitation process was combined with the county's Leadership Reinvention Series, which invited two higher performing districts (Sanger Unified and Chula Vista Elementary District) to Santa Clara for presentations and panel discussions with local districts and schools about the change processes that took place in Sanger and Chula Vista. Two visits were then carried out to these higher performing districts in Fresno and San Diego County, respectively. Another two visits were conducted with higher performing schools (one elementary and one middle school) within Santa Clara County. Two elementary and two middle schools in PI participated in these visits (three of the schools took part in two visits each).

Shasta County. Shasta County conducted four one-on-one visits outside the county. Four elementary schools in PI were matched with three higher performing elementary schools in Sonoma, Sutter, and Yuba counties (two schools visited the same host school at two different times). Shasta had planned to involve a high school in the process, as well. However, it was difficult to identify a higher performing high school that was within Regions 1-3 because few such schools exist. When a high school was identified, it was difficult to engage this school in the process due to timing issues. Thus, a high school visit did not take place.

Sonoma County. Sonoma County used an instructional rounds approach with one district in PI. The process was led by a district administrator who had carried out the process at the county level last year. Eleven schools within the district (seven elementary, two middle, and two high schools) participated in four instructional rounds visits: two visits within the district (to one elementary and one high school) and two visits to two elementary schools in a neighboring district. Participating schools conducted between one and three instructional rounds visits each.

Use of Funds

Counties spent the \$7,000 stipends on teacher substitutes for visiting teachers (and in Sonoma County, host teachers as well), travel expenses (e.g., mileage, airfare), and lunches (for debriefing meetings). Most counties set up an invoice system for schools and districts to get reimbursed, but Fresno provided \$1,000 to each visiting school up front. Three counties (Santa Clara, Shasta, and Fresno) also paid each host school \$300 for participating.

Level of County Involvement

Of the 81 survey respondents, 72 percent reported that county staff were either very or moderately (but sufficiently) involved in the school visit activities. This number was even higher (91 percent) when excluding the Sonoma respondents, whose process was directed by a district administrator with minimal county-level involvement.

This level of county staff involvement was confirmed by the county staff, who indicated that they had high levels of involvement in the process: they helped match and prepare the schools, participated in school visits, and carried out debriefing meetings. The number of county staff involved in each county varied. As mentioned, there was limited county staff involvement in Sonoma because the process was led by a district administrator. In Fresno County, only one person was involved; in Santa Clara, two staff participated; and in Shasta County, up to five different county staff were engaged in the process, with one person serving as the lead. The Shasta lead noted that she had a high level of involvement in the beginning of the process but then handed off the visits to other staff. In retrospect, she reported that this was not the best approach because she was disconnected from the later stages of the process.

Level of District Involvement

The level of district involvement was lower than the county-level involvement. About three fifths (58 percent) of survey respondents reported that district staff were either very or moderately (but sufficiently) involved. These numbers varied across counties (Fresno: 85 percent; Sonoma: 76 percent; Santa Clara: 50 percent; and Shasta: 26 percent). They also varied for visiting respondents (68 percent) versus host respondents (23 percent).

County staff confirmed the different levels of district involvement. In Fresno, one visiting district participated in a visit and another assisted with the process. In Sonoma, the district-level involvement was obviously high because it was a district-led effort. For example, the superintendent led two of the instructional rounds visits. In Santa Clara, there was a mixed level of district involvement. For two of the visiting schools, districts were quite involved in the process; for the other two schools, districts had little involvement apart from initial conversations with county staff and selection of participating schools. Finally, in Shasta, only one of four districts participated in a visit.

School-Matching Process

In most cases, counties initiated the school-matching process by contacting the lower performing schools and their districts. This process was facilitated by existing relationships with many of the sites because of prior school- and district-improvement work. They shared the school-matching data provided by AIR and discussed possible host-school sites. In a few cases, schools and districts identified their own matches. For example, in Sonoma County, where the process was focused on one district in PI, the two visits that took place within the district were at schools that had not been identified as higher performing. Also, in Fresno County, one of the visiting schools heard a presentation by a local district on its best practices and decided to visit two of its schools, one K–2 school and another with Grades 3–6, partly because they

were implementing the same English language arts (ELA) curriculum as the lower performing school and the visiting school wanted to see the curriculum being implemented with better results.

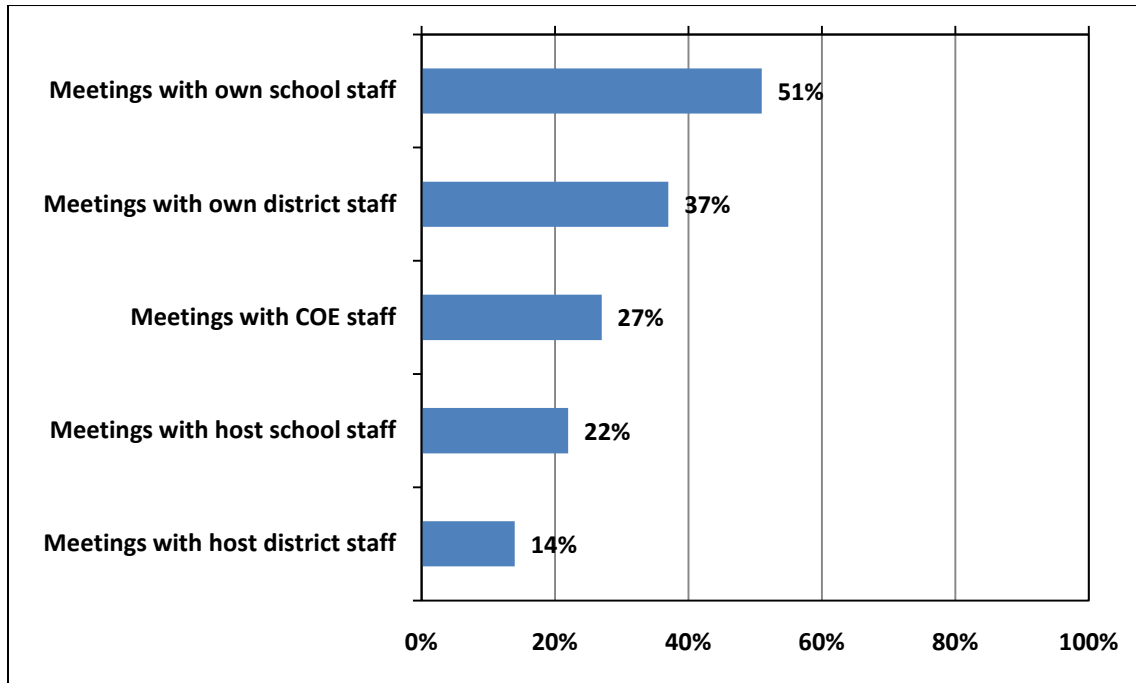
Survey respondents from visiting sites confirmed that they were involved in selecting host schools. However, not surprisingly, visiting district administrators and principals (70 percent) were more involved in this process than were visiting teachers (21 percent). Most counties made the initial contact with the host districts and schools, sometimes with the involvement of visiting district and school staff. Shasta County developed a set of screening questions for host schools based on the nine Essential Program Components (EPCs)¹³ to assess the host school's strengths and weaknesses (see Appendix D). Similar to last year, some of the principals from visiting schools exhibited less capacity and motivation to participate in the process than others. However, a few county staff noted that they were not always able to provide the needed support and that this affected the quality of the process in these cases.

School Visit Preparation

Visiting teachers were asked how they became part of the school visit activities. About three fifths (61 percent) of these survey respondents reported that they were asked by their principals to participate in the process, almost one quarter (23 percent) volunteered, and the remaining visiting teachers (16 percent) were asked by their district. Among all visiting school respondents, about half (51 percent) reported that the most common preparation for visits was to meet with their own school staff (see Exhibit 3). This was followed by more than one third (37 percent) who said that they met with their district staff to prepare and about one quarter (27 percent) who met with county staff.

¹³ The EPCs were developed by the California Department of Education to assist schools and districts in improving achievement for all students. A description of the EPCs can be found at: <http://www.cde.ca.gov/ta/lp/vl/essentialcomp.asp>

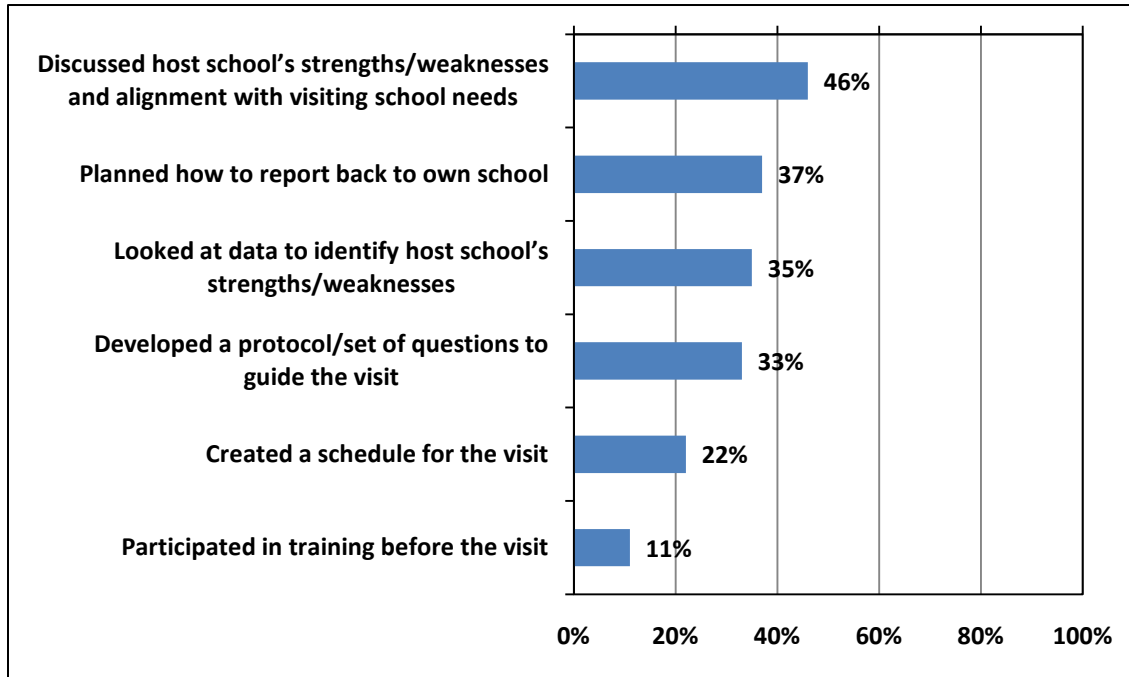
Exhibit 3: Percentage of Visiting Respondents Reporting Meetings to Prepare for the Visits



However, about one fifth (21 percent) of all survey respondents did not participate in any meetings to prepare for the visits. More respondents in Fresno (31 percent) and among host participants (28 percent) responded this way.

We also asked visitors how they prepared for visits. The most common activity was to discuss the host school's strengths and weaknesses and alignment with visiting-school needs (46 percent). In addition, about one third of all visitors reported each of the following methods of preparation: planning how to report back to their own school (37 percent), looking at data to identify the host school's strengths and weaknesses (35 percent), and developing a protocol or set of questions to guide the visit (33 percent). (See Exhibit 4.)

Exhibit 4: Percentage of Visiting Respondents Reporting Activities to Prepare for the Visits



The schedules for visits tended to be developed by the hosts; 61 percent of hosts compared with 22 percent of visitors reported that they developed a visitation schedule.

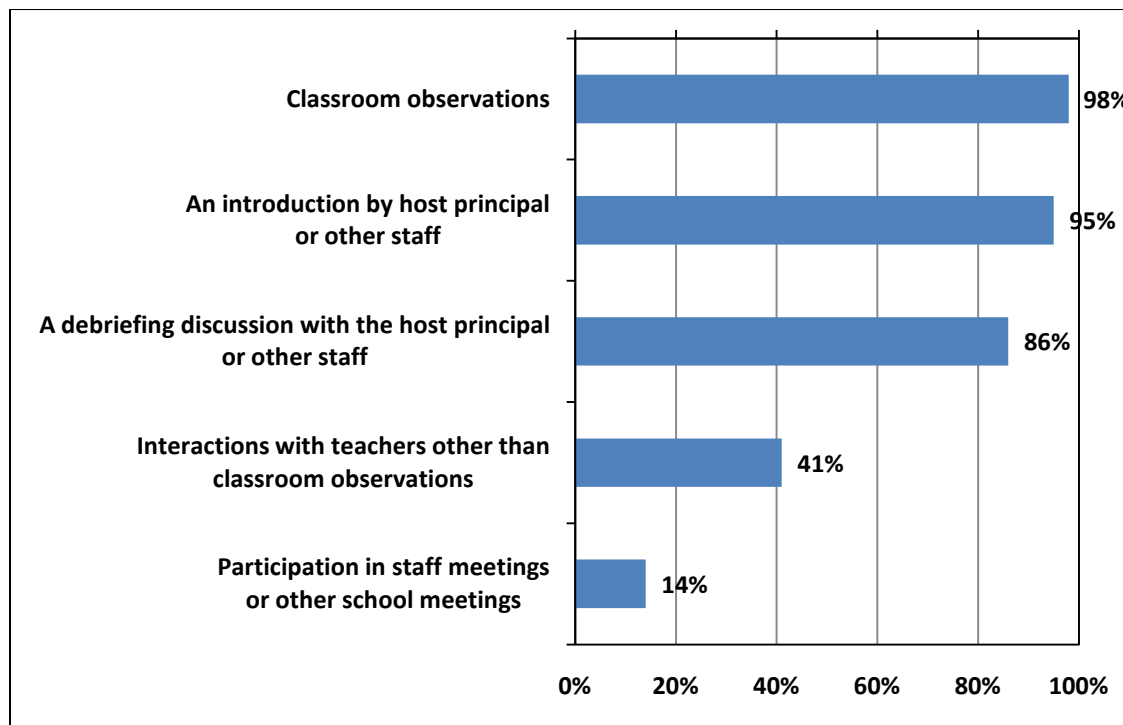
County staff reported that they helped schools narrow the focus of the visits and discussed the visitation structure. However, few counties helped schools develop protocols or guiding questions for the visits (though Shasta County developed a “tip sheet” for how to carry out the whole process, as shown in Appendix E). This was different in Sonoma County, where all visitors participated in two-hour training sessions on the instructional rounds process, with a focus on identifying a school’s “problem of practice,” collecting evidence through classroom observations, and analyzing and discussing the evidence collected. The training included practice in how to observe classroom instruction (with a focus on what students and teachers are doing and saying) and the use of a protocol for carrying out the visit (see Appendix F).

School Visit Activities

A majority of the visitors (76 percent) reported participating in one school visit, 19 percent in two visits, and 5 percent in three or more visits. County staff reported on a general structure for the visits that included an introduction by the host principal in the morning, classroom observations with host guides before lunch, a debriefing with hosts over lunch, more classroom observations after lunch, and a debriefing at the end of the visit either with or without hosts.

School and district participants confirmed this structure of the visits. The most common school-visit activity reported by visiting respondents was classroom observations. Almost all visitors (98 percent) reported engaging in this activity, followed by an introduction (95 percent) and a debriefing discussion (86 percent) with the host principal or other staff. (See Exhibit 5.)

Exhibit 5: Percentage of Visiting Respondents Reporting Activities During the Visits



Only about two fifths (41 percent) of all visitors reported interactions with host teachers other than classroom observations. However, this varied widely by county (Shasta: 85 percent; Santa Clara: 50 percent; Fresno: 36 percent; Sonoma: 10 percent). Thus, Sonoma’s instructional rounds visits did not appear to emphasize interactions with host teachers other than classroom observations, according to survey respondents from this county.

As mentioned earlier, we observed a school visit in three of the four counties: Fresno, Santa Clara, and Shasta. We briefly describe each visit below.

Fresno County, Elementary School Visit. A K–5 elementary school from Fresno County visited a K–2 school in another district within the county. The schools had similar demographics: high rates of poverty, ELs, and Hispanic students. The school became a California Distinguished School in 2009–10. The visiting principal and three teachers (K, 1st, and 2nd) participated in the visit along with a county staff member. (The visiting principal, upper elementary teachers, and the county representative had visited a Grades 3–6 school in the same district earlier in the week.)

The visit lasted from 8 a.m. to 2 p.m., with a half-hour introduction in the morning, three hours of classroom observations before lunch, an hour and a half debriefing over lunch, and another hour of classroom observations after lunch. The host principal and a resource teacher led the introduction and participated in the debriefing. The visitors split up during the visits and were not accompanied by host staff. The visiting principal observed on her own, as did the kindergarten teacher and county representative. The 1st- and 2nd-grade teachers observed together.

The visitors did not appear to have brought documentation with them, but the host principal provided a schedule for the visit, a school map, the school schedule, and lesson plans of selected classrooms. Also, the visitors did not appear to follow a protocol, but some took notes during the observations. During the

debriefing, visitors asked questions about benchmark assessments and the use of Data Director, the use of the ELA curriculum (which is the same at both the visiting and host school), special education testing, and the school's preschool program. At the end of the visit, the visiting principal asked for a three-minute observation walk-through form from the host principal, and the visiting teachers expressed appreciation for the opportunity to observe host teachers. Overall, however, it was noted that there were no guides during classroom observations, no use of a protocol, and no teacher interactions other than classroom observations. The visiting team was planning to meet the following week with the school's other visiting team to debrief the two school visits.

Santa Clara County, Middle School Visit. Two middle schools (Grades 6–8) from Santa Clara County visited another middle school within the same county. The schools have similar demographics: high rates of poverty, ELs, and Hispanic students. The host school has implemented three small learning communities, which are called colleges: College of Academic Leadership, College of Liberal and Performing Arts, and College of Innovation. Students also are placed in different-level classes depending on performance and teacher recommendations (advanced/honors, benchmark, strategic, intensive, English language development, and special education). Two principals, eight teachers, and a county representative participated in the visit.

The visit lasted from 8:30 a.m. to 12:15 p.m. and consisted of the following activities:

- A 15-minute introduction by the host principal
- One hour and 15 minutes of observations in school teams, with the host principal and a resource teacher serving as guides
- A half-hour break during which the teams talked among themselves
- Two half-hour debriefing sessions with each team and host teachers (while the other team conducted more classroom observations)
- A debriefing during lunch with both teams, the host principal, and the county representative for 45 minutes

The visitors did not appear to have brought documentation with them, but the host principal provided a schedule for the visit, the master schedule, and a section from the staff handbook on schoolwide guidelines (e.g., instructional expectations, student rules). The visitors did not appear to follow a protocol. Some of the visitors took notes and pictures of displays during the observations. During the debriefing with host teachers, visitors asked a number of questions about student interventions, formative assessments, teacher collaboration, school climate, and career counseling.

During the debriefing at the end of the visit, the visitors expressed appreciation for the interactions with the teachers outside the classrooms. They also expressed positive reactions to the level of classroom management in the classes they observed (e.g., each classroom was on task and had a student greeter who introduced him- or herself to the visitors to explain what the class was currently working on). Furthermore, the visitors expressed appreciation for the host guides being knowledgeable about the school and for doing classroom observations in school teams so they could discuss what they observed. The visitors said they wished they could have conducted fewer classroom observations and spent more time with teachers. They also noted that they would have liked to stay together as a whole group during the meeting with teachers, so each team could have heard the other team's questions. Finally, visitors provided both positive and next-step feedback to the host principal, which made it more of a two-way learning process. In fact, one of the host teachers asked the visitors when they could come visit their schools.

Shasta County, Elementary School Visit. A K–5 elementary school from Shasta County visited a K–5 school in Sutter County with similar demographics, though the host school had a higher poverty level, more ELs, and more Hispanic students than the visiting school. The host school received a Title I Academic Achievement Award in 2009. The visiting team consisted of a principal, a literacy coach, four teachers, a district administrator, and a county representative.

The visit lasted from 8 a.m. to 2:30 p.m. It included the following activities:

- 8 to 8:30 a.m.: Hosts and visitors, including the host principal, host vice principal, host literacy coach, host teachers, and a district administrator from the host district, met over breakfast.
- 8:30 to 9 a.m.: The host principal, vice principal, and literacy coach introduced the school, and the literacy coach spent some time describing the English language development curriculum that the district has developed during the past eight years.
- 9 to 11 a.m.: Visitors were broken into three groups for classroom observations, hosted by the principal, vice principal, and literacy coach.
- 11 to 11:30 a.m.: The vice principal presented the school’s response to intervention model and responded to questions from the visitors.
- 11:30 a.m. to 1 p.m.: During lunch, visitors were joined by the host teachers in job-alike groups by grade and function (e.g., literacy coaches, principals). Principals also got a chance to meet one-on-one a couple of other times during the day.
- After lunch: More classroom observations and a 45-minute debriefing at the end of the visit with the host leadership team and the visitors.

The visitors had provided questions in advance to the hosts, and the hosts provided a schedule for the visit and a binder with information about assessments, instructional monitoring, pacing guides, and student discipline. The visitors did not appear to follow a protocol. Some of the visitors took notes and pictures during the observations and asked the hosts questions. During lunch and debriefings, visitors asked questions about implementation of the ELA curriculum, differentiation of instruction, teacher collaboration around data, the school’s behavior and character program, and parent involvement.

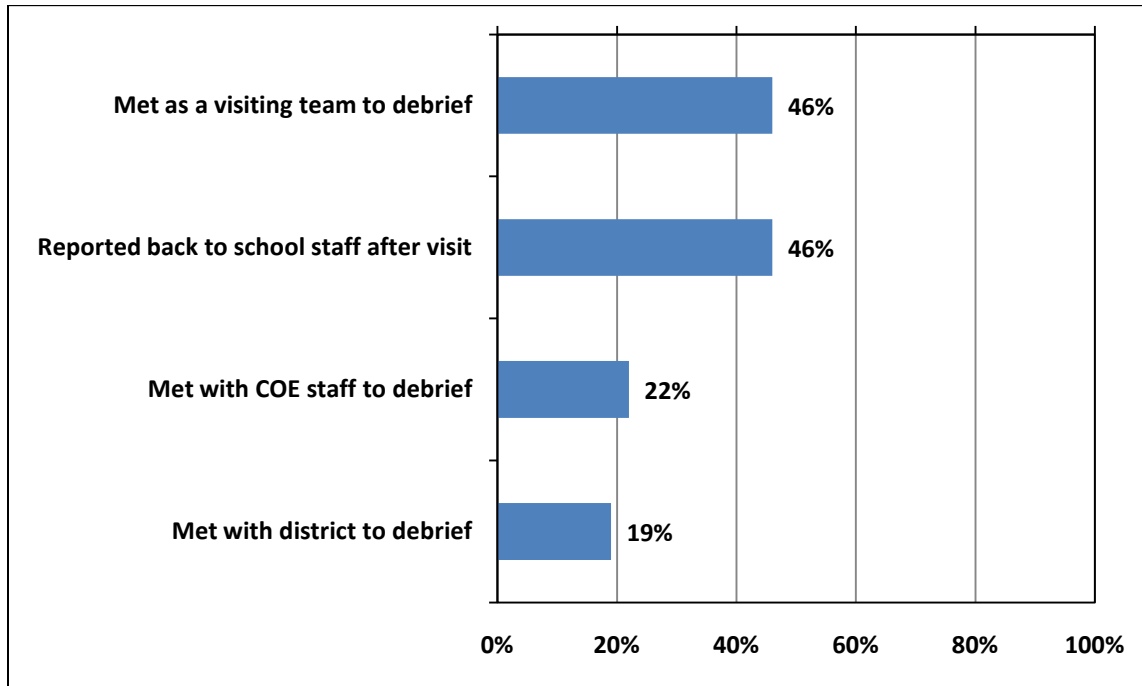
Overall, this visit appeared to be well planned and executed, with the visitors expressing appreciation for the experience. They particularly noted the implementation of the ELA curriculum, the collaborative environment (i.e., everyone was on message with the same goals and tools), and that students seemed consistently engaged and well behaved. In fact, one teacher commented that this was the best visit she had ever been on. At the end of the visit, hosts and visitors exchanged not only cards and emails, but also hugs, which was an indication of the level of trust that had been built. After the visit, the visiting district decided to purchase the host district’s English language development curriculum for implementation at the visiting school.

Summary of School Observations. As described, some school visits appeared to be better planned and executed than others. For example, none of the visiting teams used a protocol for the visit (though one county, Shasta, provided questions to the host school in advance); two visiting teams did not involve districts (Fresno, Santa Clara) or provide feedback to the hosts (Fresno, Shasta); and one visit (Fresno) did not have host guides for classroom observations or arrange for interaction between visiting and host teachers, even though these were some of the “best practices” identified in the Year One project report. However, when these practices were implemented (e.g., providing questions to the host school in advance, involving district administrators in the visits, allowing for extensive teacher interaction and job-alike partnering, and providing feedback to the host school to make the process a two-way learning experience), the visits appeared to be more successful, with meaningful knowledge sharing between visitors and hosts.

Follow-Up Activities

According to visiting survey respondents, the most common follow-up activity after the visits was to meet as a visiting team to debrief and report back to their own school staff. About half of the visitors (46 percent) reported these follow-up activities, as shown in Exhibit 6.

Exhibit 6: Percentage of Visiting Respondents Reporting Follow-Up Activities After the Visits



More visiting principals and district administrators (42 percent) than teachers (14 percent) reported meeting with county office staff to debrief the visits. In addition, about one quarter (27 percent) of visiting principals prepared a report on the visit. Principals and teachers also were asked if they had any follow-up conversations with their host counterparts after the visits. These responses varied across visitors and hosts in the following ways:

- About one third of visiting principals (36 percent) reported having follow-up conversations with host principals, whereas 11 percent of host principals reported this.
- Fourteen percent of visiting teachers reported having follow-up conversations with host teachers, whereas none of the host teachers reported the same.

County staff explained that the follow-up is the hardest part of the school visitation process. Some counties held debriefings immediately after the visits, but others did not and were not sure how the information had been used, if at all. Follow-up seems essential for the school visits to have a lasting impact. One county’s staff would like to implement follow-up interviews with visiting principals and bring all of these principals together for a discussion. Another county accomplished this by discussing the visits at principal meetings in the district (this was Sonoma, which focused on just one district) and at the K–12 Curriculum Council. This county also carried out an after-visit review focusing on lessons learned and next steps following one of the instructional rounds visits (see Appendix G) and included this information in the school plans for next year. Finally, Shasta County followed up with the host schools to share reflections and solicit feedback on the process.

Impact of the School Visits

The reported impacts varied across the four counties. In this section, we summarize what participants (county leads, district staff, principals, and teachers) reported as most and least useful and their perceptions of the impact of the process. We also describe respondents' interest in participating in similar activities in the future and their suggestions for improvements to the process.

- **What was the impact of the school visitation process?**
 - How useful were the school visits to participants? What was most useful, what was least useful, and why?
 - What was the impact, if any, on participants and their schools?
 - Would participants be interested in participating in similar activities in the future?
 - How could the process be improved to make it more useful?

Usefulness of Activities

We asked the participants how useful they found the school visit activities and which activities they found most and least useful. We first present their overall reactions. Then we break these down by the most and least useful activities cited.

Overall Usefulness of Activities. Overall, about three quarters of all participants (73 percent) responded that the activities were either very useful (51 percent) or useful (22 percent). However, responses varied by county and by type of respondent in the following ways:

- Participants in Shasta (83 percent), Santa Clara (79 percent), and Fresno (77 percent) counties reported the activities to be more useful than did participants in Sonoma County (60 percent).
- Not surprisingly, visitors (80 percent) indicated the activities to be more useful than hosts (50 percent).
- More visiting principals and district administrators (89 percent) compared to visiting teachers (75 percent) reported that the activities were either very useful or useful.

Most Useful Activities. The activities that visiting participants reported as most useful were classroom observations. About three fifths of the visitors (62 percent) designated the classroom observations as most useful. In narrative responses, they indicated that this activity allowed them to observe specific strategies, practices, and programs that appeared to contribute to the host school's success.

I feel that just observing different grade level classrooms, I was able to see the common strategies they implemented and this alone was very useful to me. I found the EDI [Explicit Direct Instruction] strategies and lessons ... gave me the motivation and enthusiasm to plan some of the lessons over the summer. (3rd-Grade Teacher, Fresno County)

Classroom observations are very useful. To be able to ask students, in the moment, what are you doing? Why are you doing it that way? Then to watch the interaction among students, their individual thinking, their behavior with materials, etc. I find watching students other than my own to prompt a lot of reflection on my own practice and how my students are learning. (6th-Grade Teacher, Sonoma County)

Being there on the visit made a huge difference; being able to see the strategies and programs in action helped tremendously. The strategies the staff use in their data talks, school-wide strategies they use for engagement and promoting language acquisition was powerful. (District Administrator, Shasta County)

One quarter of the visitors (25 percent) noted that the conversations they had with host school staff were most useful because these conversations allowed the visitors to get a better sense of the host school's progression toward success. Finally, about one fifth of the visitors (22 percent)¹⁴ reported that the debriefing after the visit was most useful because it provided context for what was observed.

A majority of the host participants (71 percent) found the discussions and feedback from the visitors to be most useful because it allowed the host school staff to reflect on their practices and validated what they were doing.

[The most useful activity was] discussions between staff because we were able to address specific areas of interest by the visiting school. It also gave us valuable insight as to what we might be doing that differs from other sites that could be attributed to our school's success. (4th-Grade Teacher, Shasta County)

Some host participants (29 percent) also found the classroom observations to be the most useful because they allowed the host school to showcase its best practices, strategies, and programs and provided an opportunity for students to have their hard work acknowledged.

The classroom visits were the most useful because they allowed school staff the opportunity to showcase their hard work. It also allowed our wonderful students the opportunity to realize that educators from other districts are noticing their hard work. (Principal, Fresno County)

County staff found the most useful activity to be the visits to local high-performing, high-need schools because visitors were able to observe classroom practice at these sites and learn from peers.

The strength is living it and breathing it themselves when they visit the classroom and have conversations with host teachers. (County Administrator)

Least Useful Activities. About half of all participants did not list anything under the category of least useful. However, about one fifth of the visitors (22 percent) listed observing classrooms with substitute or volunteer teachers or observing activities that did not seem to pertain to them (e.g., noninstruction activities or instruction that did not apply to their grade level or subject matter of interest). Five visitors (8 percent) also listed the debriefing as not useful because it did not provide direction for either the visiting or host schools.

The school visit did not offer any insight as to how to improve [our] own site. (Principal, Santa Clara County)

The conversation at the end was difficult. We grouped our observations on post-its and found common themes. But I wasn't sure what happens next. How does the host school turn these themes into action items? (6th-Grade Teacher, Sonoma County)

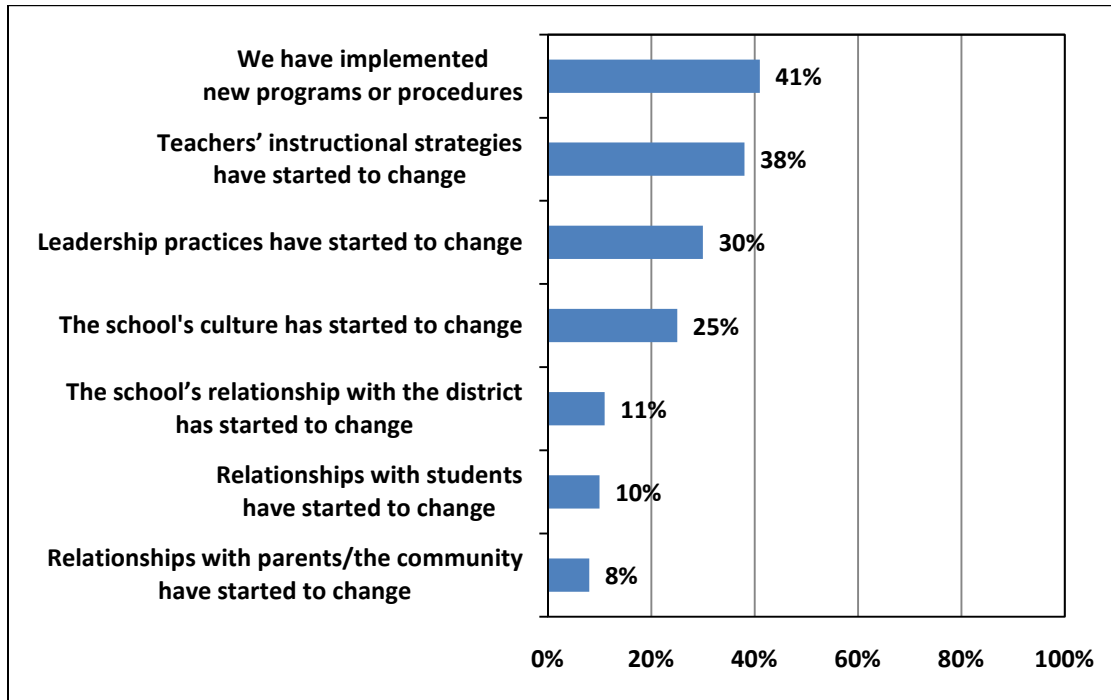
The challenging part of the process reported by county staff, apart from follow-up activities mentioned earlier, was getting some of the lower performing schools ready and motivated to participate. Three county representatives mentioned this as an issue recognizing that some visiting schools need more assistance in the process than others. One county respondent also noted that it was hard to get some of the host schools involved. However, the \$300 stipend for host schools that three counties used was reported to have helped in some cases.

¹⁴ Note that some visitors reported more than one activity as most useful. Therefore, percentages do not add up to 100 percent.

Impact on Participants and Schools

Both visitors and hosts were asked how the school visits affected them. The most commonly cited areas reported by visitors were implementation of new programs and procedures and changes in teachers' instructional strategies. About two fifths of visiting participants (41 percent and 38 percent, respectively) reported impact in these areas. (See Exhibit 7.)

Exhibit 7: Percentage of Visiting Respondents Reporting Impacts From the Visits



Between 25 percent and 30 percent of visiting respondents also indicated that leadership practices and school culture had started to change after the visits, and between 8 percent and 11 percent of visiting respondents reported seeing changes in the school's relationship with the district, with students, and with parents and the community. However, 16 percent reported no changes from the process. Below we provide examples of changes visitors reported in the seven areas in Exhibit 7.

New Programs or Procedures. Visiting respondents reported implementation of new programs and procedures in areas such as EL programs and strategies and student incentive and recognition programs.

The observation of certain EL strategies and classroom procedures were recognized by teachers as beneficial, and I believe there has been some movement towards implementation of aspects of the observed practices [and procedures]. (District Administrator, Sonoma County)

Teachers' Instructional Strategies. Changes in teachers' instructional strategies included increased use of student engagement strategies (at least four respondents reported this) and greater use of Explicit Direct Instruction (EDI) strategies (two respondents).

I used the information to try and engage my students at a higher level. (Math Teacher, Santa Clara County)

More EDI strategies, stand and deliver, complete sentences to respond, emphasize the learning objectives in class, and use of reading strategies. (5th-Grade Teacher, Fresno County)

Leadership Practices. It was reported that the activities influenced the way some principals observe classrooms, as well as their discussions with staff around classroom practice.

Some of our principals are beginning to use the protocols in their own observations in the classrooms. We are getting comments from them such as “this is changing the way I look at classroom instruction. I am spending much more time watching students and thinking about the task they are being asked to complete.” (District Administrator, Sonoma County)

School Culture. Some respondents reported that the school culture had started to change: teachers were more collaborative, conversations focused on goals for next year, and staff were more accountable.

Teachers are starting to open their classroom doors to each other. (District Administrator, Sonoma County)

We are working to be accountable for everything that we do. (4th-Grade Teacher, Fresno County)

Relationship With District. Examples provided of changes in schools’ relationships with districts included a better alignment between district and school goals and a better relationship with teacher unions.

The district began this year developing SMART goals. Hopefully, this will encourage our sites within the district to work together on necessary changes. (1st/2nd-Grade teacher, Shasta County)

Relationship With Students. Some respondents reported that teachers had started to change their views of students’ abilities to achieve at higher levels.

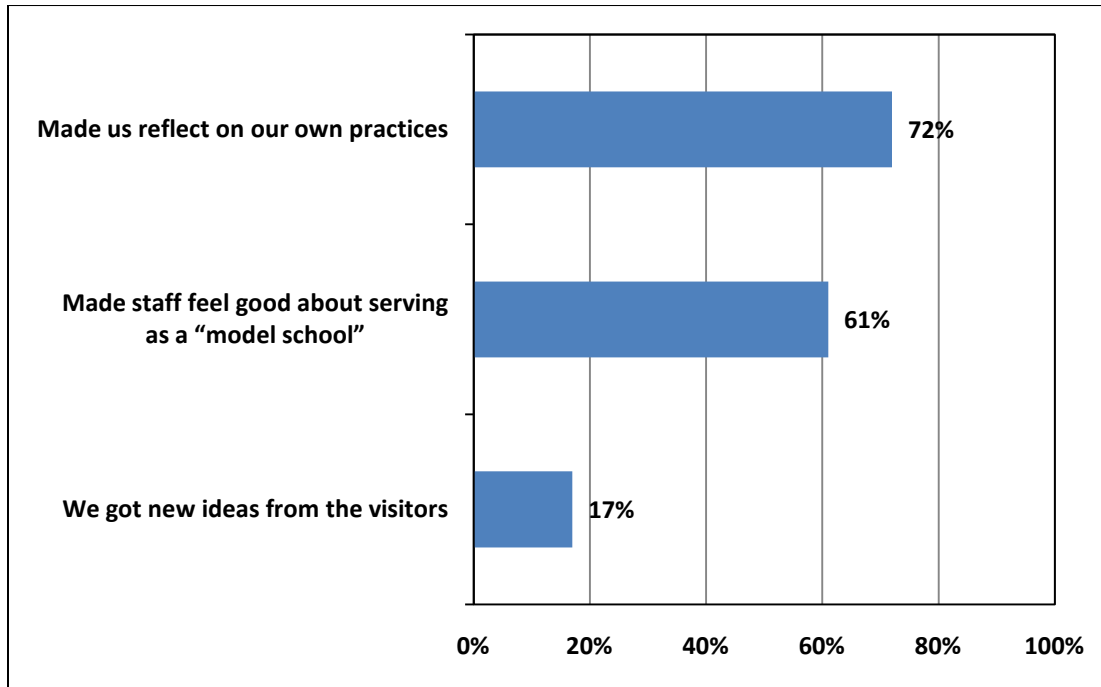
I use every opportunity to teach and re-teach, believing that all students can achieve grade level standards given enough time. (1st/2nd-Grade Teacher, Shasta County)

Relationship With Parents. It also was reported that schools had started increasing their communication with parents and the community.

We are communicating to others what our goals are, how we are implementing our plan, and percentages of students who are reaching the standard. We are encouraging the community to get involved and help us in the areas that support our goals. (1st/2nd-Grade Teacher, Shasta County)

Host participants reported that the area of greatest impact from their participation in the visitation process was reflecting on their own practices. Almost three quarters of the host respondents (72 percent) reported this effect. Three fifths of participants from host schools (61 percent) also reported that the visits made them feel good about serving as a “model school,” whereas only 17 percent of hosts reported that they got new ideas from the visitors. (See Exhibit 8.) In addition, 17 percent of host respondents reported no impact from the visits.

Exhibit 8: Percentage of Host Respondents Reporting Impacts From the Visits



The following are some examples of impacts reported by host respondents:

Reflecting on our own work offers us the opportunity to improve. (Principal, Fresno County)

The visitors validated our common practices and highlighted how that supports students. (Principal, Sonoma County)

We are struggling with next steps for reading comprehension. The visitors saw evidence of this and gave us some suggestions for next steps. (Principal, Sonoma County)

The percentage of all participants reporting no impact from the visits varied across counties (Shasta: 5 percent; Fresno: 8 percent; Santa Clara: 17 percent; Sonoma: 28 percent). County staff recognized that the process seemed to have varying impact on participants within their counties. However, as one county staff member pointed out:

[The biggest impact] is the idea that there are high poverty, high performing schools in the area and that there is not a magic bullet strategy... it takes a long time but it can be done by using teaching in the classroom as the leverage point. (County Administrator)

Participants' Interest in Future Participation and Suggestions for Improvements

Almost all participants (91 percent) expressed interest in participating in similar activities in the future. Again, this varied somewhat across counties, with 92 to 100 percent of participants in Fresno, Santa Clara, and Shasta counties responding affirmatively and 80 percent of Sonoma County participants responding similarly. Slightly fewer visiting participants (89 percent) than host participants (100 percent) reported this.

Participants were asked for suggestions on how to improve the process. They provided a number of ideas that fell mainly within four areas:

- Engage in more preparation prior to visits (four host principals, one visiting principal, six visiting teachers).
- Schedule more time to speak to and interact with host staff (two visiting principals, two host teachers, seven visiting teachers).
- Conduct more classroom observations during visits (six visiting teachers).
- Carry out more follow-up activities after the visits (three visiting district administrators, one visiting teacher).

More Preparation Prior to Visit. Both host and visiting respondents reported that they would like to engage in more preparation prior to the visits. Some of the host principals indicated that they would like greater clarity about what the visiting school wants to see and discuss, to receive questions from the visitors in advance, and to have a better sense of the visiting school so they can prepare and tailor the visit.

I would like a brief summary of participating schools' progress including API, AYP, and instructional practices in place. For example, where are they in PLC's, RTI, ELD, and instruction? It would help me when addressing them or answering questions. (Host Principal, Fresno County)

Similarly, some of the visitors indicated that they would like to know more about the host schools in advance—how they were chosen and information about their programs and instructional strategies.

We asked the host school for their list of essential standards and [a] copy of their step charts but have not been able to receive them. Perhaps if a school/district is being successful they can have material they know is working for them on hand to deliver to guest site on the date of the visit. (2nd-Grade Visiting Teacher, Fresno County)

More Time to Interact With Host Staff. Participants also recommended that more time be spent interacting with and speaking to host staff during the visits. For example, two visiting principals would like more discussions through job-alike meetings with the host leadership team. Teachers (both visitors and hosts) also noted that they would like more time to ask and answer questions and share ideas.

[I would like] a chance to talk with teachers of classrooms visited afterwards to get their ideas and comments about school goals and achievements of those goals. (3rd-Grade Visiting Teacher, Sonoma County)

It would be more beneficial to have more time for the host school's teachers to be able to meet and discuss ideas with the teachers and principal of the visiting school. Since we had to adhere to our normal teaching schedule, we had a very limited time to talk with the visitors. (4th-Grade Host Teacher, Shasta County)

Conduct More Classroom Observations. Six visiting teachers recommended more classroom observations during visits. However, one visiting district administrator would have liked fewer classroom observations and more time to talk to teachers and the principal.

More Follow-Up Activities. Some visiting participants reported that they would have liked more time to debrief and discuss next steps after the visits. Two district administrators shared their ideas for follow-up and district involvement in the process.

The process was very useful. The only idea I have to make it more useful would be to have more follow-up activities planned to circle back and look at all that was learned. Or help the schools to create an action

plan based on what they observed; something to ensure that the visit leads to change. (Visiting District Administrator, Santa Clara County)

Always require that the Superintendent or a member of his/her cabinet attend the visit with the school and district team so the information gathered flows upwards as well. Also, schools should be asked to present their learning/reflections from the visits to the Superintendent and cabinet and/or to board members and decide on the pieces they could immediately implement to address their own particular patterns of student achievement. (Visiting District Administrator, Santa Clara County)

Finally, two county staff respondents provided a couple of suggestions for improvements: match schools sooner in the school year and focus on just a few districts. When asked whether they would like to continue with school visitation activities, county staff all answered affirmatively and that they would continue to do so without CA CC assistance if it were not available. However, they also indicated that they appreciated the data-matching assistance, the funding, the information sharing across counties, and the documentation efforts, even though they were time consuming at times (e.g., survey follow-up with nonrespondents).

Summary of Findings

A total of 39 schools (21 visiting schools and 18 host schools) participated in the school visitation process (166 participants, not including county office staff). The 21 visiting schools included 15 elementary schools, 4 middle schools, and 2 high schools. Each county carried out four visits and used the school visitation process as part of its school- and/or district-improvement process, mostly through one-on-one matching between lower and higher performing schools.

The level of implementation and impact varied, but about three quarters of all participants (73 percent) reported that these activities were either very useful or useful. Visitors found the classroom observations to be most useful because the observations allowed them to observe specific strategies, practices, and programs that contributed to the host school's success. A majority of the host participants (71 percent) reported discussions and feedback from the visitors to be the most useful activity, indicating that it allowed them to reflect on their practices and validated what they were doing. However, both visitors and hosts reported that they would like to see more preparation before the visits, more discussions during the visits, and more follow-up after the visits.

In spite of these limitations, about two fifths of the visiting participants (38 percent–41 percent) reported positive effects from the school visit activities in the areas of new programs and procedures (e.g., EL programs) and teachers' instructional strategies (e.g., student engagement strategies). In addition, almost all participants (91 percent) expressed interest in participating in similar activities in the future. The following statement provides a sense of participants' appreciation for the overall process.

I appreciate the opportunity to visit other schools. Educational funding makes it very difficult to have experiences, like visitations, with peers. These outings not only generate ideas, but it gives you time to bond and build relationships within your own site. Building a community in your own school is the beginning of success with students and staff. Thank you! (3rd-Grade Visiting Teacher, Shasta County)

Recommendations for Best Practices

Below, we offer recommendations for best practices based on participant suggestions and our own observations. They fall within the following six categories:

Timing of School Visitations

- School visitations should be conducted early in the school year. This will allow matched schools to have a more extended relationship throughout the year and will provide more opportunities to implement changes at the visiting sites.

County and District Involvement

- Counties should be involved from the beginning to the end of the process, with one (or more) staff consistently involved.
- When matching schools in other counties, county staff should consistently inform host counties of school visitation activities.
- To facilitate implementation of school-level interventions, districts associated with visiting schools should be involved in the process, including the school visit preparation, the school visits, the debriefing, and follow-up activities.
- Districts associated with host schools should be clearly informed about the visit and be invited to participate in the process.

School-Matching Process

- To get buy-in from visiting schools and districts, the matching data should be presented clearly and principals and district administrators should be part of the host-school selection process.
- Counties should be aware of the relative leadership capacity and motivation of principals from both visiting and host schools and should consider carefully which schools will get the most out of a visitation.
- In addition to demographics and resources, the host school's strengths should match the visiting school's needs to the extent possible.
- To get buy-in from the host schools, incentives should be provided in the form of a stipend, feedback from the observations, and teacher involvement in the process.
- School visits should be framed as a two-way learning process.

School Visit Preparation

- The visiting team members should be chosen carefully to match the identified needs of the lower performing school.
- Principals from visiting schools, in collaboration with the county, district, and the principal from the host school, should develop a schedule for the school visit and a set of questions to guide the visit.
- The visiting school team should review background information and data on the higher performing school, the schedule, and the guiding questions prior to the school visit.
- The host school team should be made clear about the purpose and focus of the visit, receive questions from the visitors in advance, as well as background information and data on the lower performing school to be able to prepare and tailor the visit as much as possible.

School Visit Activities

- Visiting and host teachers, as well as principals and district administrators, should have opportunities to interact during school visits outside of classroom observations.

- To allow for meaningful activities when teachers are involved, the school visits should last at least three hours, and perhaps a full day, to maximize opportunities for extended classroom observations and teacher interactions.
- Counties should consider implementing the instructional rounds model, which provides structure to the process through its design. It clearly identifies the host school's instructional focus and strengths and teaches participants how to observe classrooms. It also involves observing a large number of classrooms during a visit, extensively analyzing and discussing the classroom observation findings through an in-depth debriefing process. Finally, it provides feedback and delineates next steps for both the lower and higher performing schools. However, the process also should provide for interaction between visiting and host teachers; this is not currently emphasized in the instructional rounds model.

Debriefing and Follow-Up Activities

- To ensure that interventions are successfully implemented, counties and districts should be consistently and actively involved in school visit debriefings and follow-up activities. At a minimum, counties and districts should make sure that the lessons learned from the school visit are shared with all staff at the lower performing school, as well as with all district staff, and that an action plan with next steps is developed.

Policy Implications

This project is based on strong evidence demonstrating that school- and district-improvement expertise exists in the field of practice and a belief in the importance of developing ways to share this knowledge through communities of schools and districts. One way to share this expertise is by identifying the schools and districts where this expertise resides and disseminating the knowledge across sites. The project aimed to do that through matching of higher and lower performing schools and through county facilitation of school visitations across sites.

Given the relative success of these efforts as summarized in this report, and the fact that the county offices of education are already incorporating the process into their school- and district-improvement strategies, the California Department of Education should consider making the school visitation process, and/or other approaches to developing cross-school and -district communities, a part of its overall school- and district-improvement plan. Facilitation of these efforts is needed at the county and district levels. Some funding is important to ensure that teachers can get released from their classrooms to observe each other and have meaningful interactions, and some transportation costs are involved when visits are conducted outside the local community. Training of facilitation staff also is important to ensure that the process is implemented through school matching, preparation, visitation, and follow-up as optimally as possible.

Appendix A:
School Matching Request Form

CA CC School Visitation Study School Matching Request Form

Date of Request: _____

County Name: _____

County Contact (name, email, phone): _____

Please provide information about the school(s) you want matches for.

	School Name	School Type (elementary, middle, high)	District Name
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

Please check the 2 or 3 most important factors that you would like the school(s) matched on. (Note: The more factors you select, the fewer number of well-matched schools will result.)

- Percentage of students in poverty
- Percentage of English learners
- Percentage of Hispanic students
- Percentage of African American students
- Percentage of Asian Students
- Percentage of students with disabilities
- School size
- Grade-span

Please indicate which region(s)/counties(s) the matches should come from (as well as any specific exclusions of districts or counties within the region, if applicable). _____

Should school matches include charter schools? Yes No

Please return to Mette Huberman at MHuberman@air.org or fax to 650-843-8200

Appendix B:
Example of School Matching Report

CA CC School Visitation Study

Matches for Elementary School, Shasta County, Elementary School District

It is recommended that this document be printed in color.

CONTENTS

How Schools are Matched.....	Page 1
Matches within Regions 1, 2 , 3.....	Page 2
Student Achievement Index Trends.....	Page 3
Additional Achievement Information.....	Page 4
Additional Demographic Information.....	Page 5

November 17, 2010

How Schools are Matched

School matches are primarily based on AIR's school achievement index (SAI) with the idea of pairing schools with a relatively low SAI to like schools with SAIs that are higher. The goal is to find possible companion schools for forming collaborative relations and promoting the sharing of information among schools realizing different achievement patterns with similar students.

The SAI is a single number, ranging from a low of -5.0 to a high of 5.0, that measures the difference between a school's actual and predicted performance on California Standards Tests (CSTs) in English Language Arts (ELA) and math. These predictions are based on the performance of similar schools serving like students across the comparison region. If a school performs much better than other like schools in the region with similar students they are said to be performing better than predicted. These statistical comparisons are based on similar percentages of students who are eligible for free or reduced price lunch, who are English learners, who are in special education, and who are Hispanic, African American, and Asian. An index greater than zero indicates that a school performed better than predicted, while an index that is less than zero indicates performance worse than predicted.

SAIs are calculated for all schools in the matching region, over the four year span of 2006-07 to 2009-10. Suggested pairings are based on the average SAI over these 4 years to provide a reliable measure of a school's academic performance over time.

School matches are also based on criteria specified by the county requesting the matches. For this document, Shasta County specified the following criteria:

Region(s): 1, 2, 3

School Demographic #1: Poverty

School Demographic #1: Hispanic students

School Demographic #2: Enrollment

School Demographic #3: Grade-span

Exclusions: Charter Schools

Shasta County Schools

Schools that did not meet percent proficient targets overall and for students in poverty and Hispanic students in ELA and math in 2009/10.

Schools that did not meet all 2009/10 AYP criteria.

The following pages include the 10 schools with the highest 4-year average SAI for ELA and math (ordered from highest to lowest) for schools that are also similar to the county-identified school based on the criteria listed above.

Matches within Regions 1, 2, 3

School matches are the 10 schools with the highest average school achievement index for ELA and math (sorted from highest to lowest). All school matches have poverty equal to or above 55%, and Hispanic students equal to or above 13%. Schools were excluded if their enrollment was less than half the size of the county-identified school or more than twice its size. Schools were also excluded if their grade-span was different from the county-identified school by more than two grade-levels (unless the county-identified school has an atypical grade-span). School matches also had to meet the percent proficient targets overall and for students in poverty and Hispanic students in ELA and math in 2009/10 and meet all 2009/10 AYP criteria.

						School Achievement Index (SAI) ²					Matched Demographics 2009-10	
School	County	District	Grade Span	Enrollment 2008-09	Ordered on: Average ELA & Math	ELA	Math	PI Status 2010-11	Similar Schools Rank 2008-09	Poverty	Hispanic	
Selected School	Elementary School	Shasta	Elementary School District	K-5	361	0.07	0.02	0.13	In PI	9	79%	23%
A	Golden Empire Elementary	Sacramento	Sacramento City Unified	K-6	549	0.86	0.65	1.07	Not in PI	10	65%	15%
B	Isador Cohen Elementary	Sacramento	Sacramento City Unified	K-6	368	0.72	0.61	0.84	Not in PI	10	67%	9%
C	Covillaud Elementary	Yuba	Marysville Joint Unified	K-5	460	0.68	0.41	0.96	Not in PI	10	78%	25%
D	Bates Elementary	Sacramento	River Delta Joint Unified	K-6	216	0.62	0.54	0.70	Not in PI	10	77%	60%
E	J. X. Wilson Elementary	Sonoma	Wright Elementary	K-6	521	0.59	0.40	0.79	N/A ³	10	64%	32%
F	Sheppard Elementary	Sonoma	Roseland Elementary	K-6	702	0.54	0.24	0.85	Not in PI	7	89%	72%
G	Camellia Elementary	Sacramento	Sacramento City Unified	K-6	467	0.51	0.51	0.50	Not in PI	10	72%	32%
H	April Lane Elementary	Sutter	Yuba City Unified	K-5	522	0.41	0.76	0.06	Not in PI	10	85%	23%
I	Abraham Lincoln Elementary	Sacramento	Sacramento City Unified	K-6	492	0.30	0.14	0.45	Not in PI	6	78%	23%
J	Luther Burbank Elementary	Sonoma	Santa Rosa City Schools	K-6	354	0.29	0.36	0.21	Not in PI	9	90%	69%

¹ The cutoff for each demographic criteria specified by the county is the lower of: a) the average in the specified geographic location; b) 10 percentage points below the county-identified school.

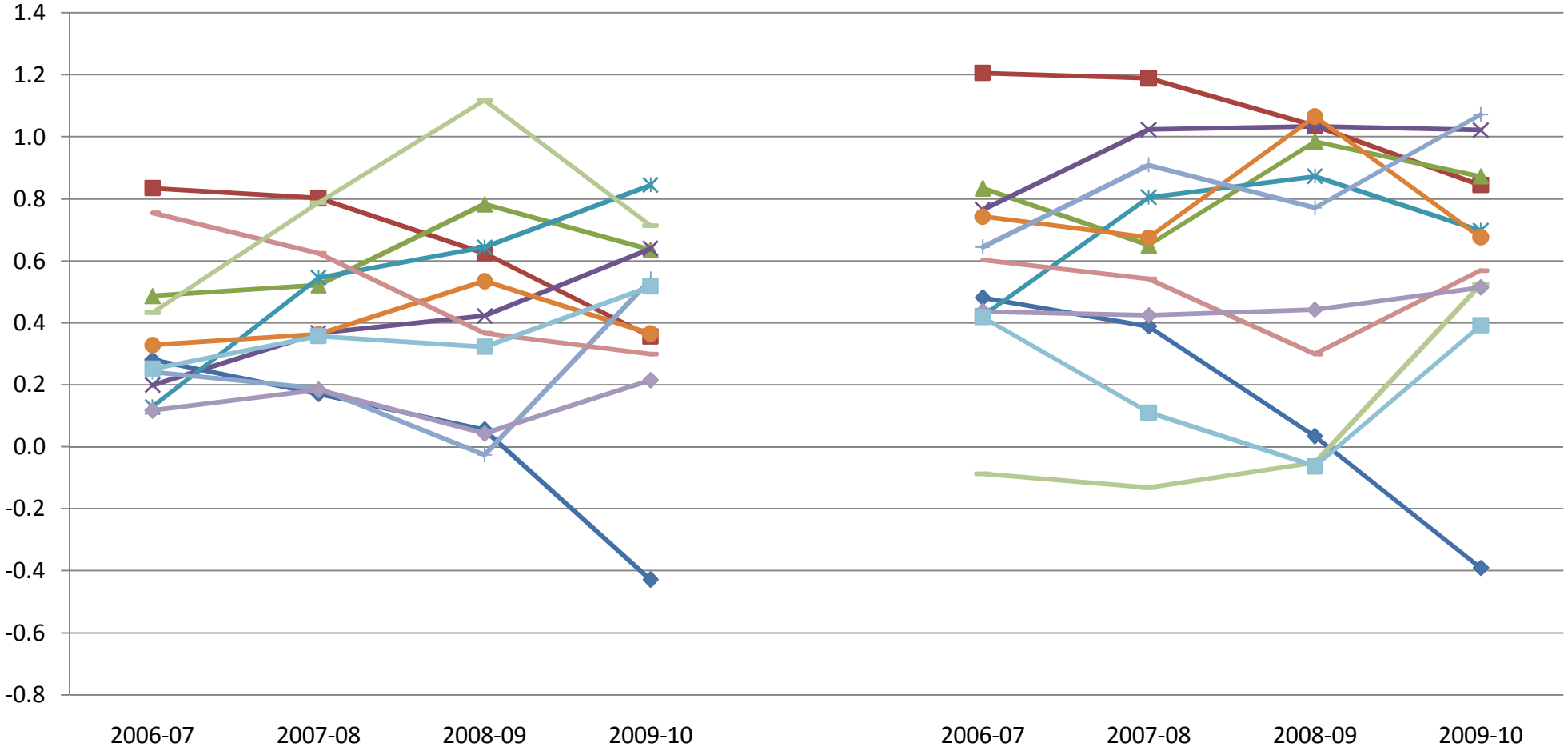
² The SAI was averaged across the most recent 4 years of CST data for ELA and math to obtain a more reliable and stable measure of a school's academic performance versus using an SAI based on only 1 year of CST data. The SAI for each of the 4 years is depicted on page 3.

³ The school does not receive federal Title I funds and is not subject to Program Improvement regardless of AYP status.

Student Achievement Index Trends

English-Language Arts

Math



- ◆ Selected School: Elementary School (Elementary School District)
- ▲ B: Isador Cohen Elementary (Sacramento City Unified)
- * D: Bates Elementary (River Delta Joint Unified)
- + F: Sheppard Elementary (Roseland Elementary)
- H: April Lane Elementary (Yuba City Unified)
- J: Luther Burbank Elementary (Santa Rosa City Schools)
- A: Golden Empire Elementary (Sacramento City Unified)
- * C: Covillaud Elementary (Marysville Joint Unified)
- E: J. X. Wilson Elementary (Wright Elementary)
- G: Camellia Elementary (Sacramento City Unified)
- ◆ I: Abraham Lincoln Elementary (Sacramento City Unified)

Additional Achievement Information

School	County	District	State Accountability Measures						Federal Accountability Measures						
			Base API ¹ 2007-08	Base API ¹ 2008-09	API Growth ² 2008-09	API Growth ² 2009-10	Met API Growth Target ³ 2008-09	Met API Growth Target ³ 2009-10	Met AYP 2008-09	Met AYP 2009-10	AYP 2009-10 % Proficient and Above in ELA	AYP 2009-10 % Proficient and Above in Math	PI Year 2009-10	PI Year 2010-11	
Selected Elementary School	Shasta	Elementary School District	825	817	-8	-34	no	no	no	no	49%	57%	N/A ⁴	Year 1	
A	Golden Empire Elementary	Sacramento	Sacramento City Unified	870	862	-8	4	YES	YES	YES	YES	65%	79%	N/A ⁴	N/A ⁴
B	Isador Cohen Elementary	Sacramento	Sacramento City Unified	814	841	27	2	YES	YES	YES	YES	63%	71%	N/A ⁴	N/A ⁴
C	Covillaud Elementary	Yuba	Marysville Joint Unified	816	834	18	23	YES	YES	no	YES	62%	80%	N/A ⁴	N/A ⁴
D	Bates Elementary	Sacramento	River Delta Joint Unified	778	807	29	27	YES	YES	YES	YES	58%	69%	N/A ⁴	N/A ⁴
E	J. X. Wilson Elementary	Sonoma	Wright Elementary	850	881	33	-14	YES	YES	YES	YES	66%	76%	N/A ⁴	N/A ⁴
F	Sheppard Elementary	Sonoma	Roseland Elementary	743	762	21	39	YES	YES	YES	YES	44%	72%	N/A ⁴	N/A ⁴
G	Camellia Elementary	Sacramento	Sacramento City Unified	898	894	-4	6	YES	YES	YES	YES	70%	88%	N/A ⁴	N/A ⁴
H	April Lane Elementary	Sutter	Yuba City Unified	812	848	37	3	YES	YES	no	YES	65%	73%	N/A ⁴	N/A ⁴
I	Abraham Lincoln Elementary	Sacramento	Sacramento City Unified	778	771	-6	37	no	YES	no	YES	54%	67%	N/A ⁴	N/A ⁴
J	Luther Burbank Elementary	Sonoma	Santa Rosa City Schools	773	774	3	13	no	YES	no	YES	48%	58%	N/A ⁴	N/A ⁴

¹Base API is a score ranging from 200 to 1000 that summarizes a school's performance on statewide tests.

²API growth is calculated by subtracting the Base API from the Growth API to determine how much the API grew between two testing years.

³APIG Target is 5 percent of the difference between the school's API and the statewide performance target of 800 with a 5 point minimum.

⁴School is not in PI.

Additional Demographic Information

				Matched On						
School	County	District	Poverty	Hispanic	English Learners	African-American	Asian	Students with Disabilities	District Expenditures per Pupil, 2007-08 ¹	
Selected School	Elementary School	Shasta	Elementary School District	79%	23%	15%	6%	8%	14%	\$9,495
A	Golden Empire Elementary	Sacramento	Sacramento City Unified	65%	33%	15%	10%	7%	11%	\$12,348
B	Isador Cohen Elementary	Sacramento	Sacramento City Unified	67%	27%	9%	31%	6%	15%	\$12,348
C	Covillaud Elementary	Yuba	Marysville Joint Unified	78%	38%	25%	4%	7%	8%	\$11,887
D	Bates Elementary	Sacramento	River Delta Joint Unified	77%	79%	60%	0%	2%	8%	\$16,404
E	J. X. Wilson Elementary	Sonoma	Wright Elementary	64%	47%	32%	3%	8%	10%	\$10,229
F	Sheppard Elementary	Sonoma	Roseland Elementary	89%	90%	72%	1%	2%	11%	\$11,748
G	Camellia Elementary	Sacramento	Sacramento City Unified	72%	22%	32%	7%	49%	3%	\$12,348
H	April Lane Elementary	Sutter	Yuba City Unified	85%	45%	23%	5%	9%	9%	\$10,183
I	Abraham Lincoln Elementary	Sacramento	Sacramento City Unified	78%	27%	23%	20%	5%	8%	\$12,348
J	Luther Burbank Elementary	Sonoma	Santa Rosa City Schools	90%	89%	69%	1%	3%	11%	N/A ²

¹District expenditures per pupil, 2007-08, were calculated using the method suggested in "Getting Down to Facts: District Dollars: Painting a Picture of Revenues and Expenditures in California's School Districts" (2006) by Susanna Loeb, Jason Grissom, and Katharine Strunk.

² Data is missing.

Appendix C:
School Visitation Plan Template



CA CC School Visitation Study

School Visitation Plan, 2010-2011 [NAME] County Office of Education (COE)

As mentioned on our last call, we believe it will be useful to start with a plan for this year's activities. This is not necessarily a final plan and it need not be extensive. We expect it can be summarized in one to two pages. Also, you need not wait for these plans to be finalized to begin. We can start providing data now, and have done so already in some counties. Within a few weeks of receiving the plans, we will be able to make specific commitments regarding the funds available for this year. **We would appreciate receiving a completed draft of the plan by October 20, 2010.** If you have questions or comments, please let us know. As always, we welcome your input. We will also discuss these plans to solicit input and ideas from others as well as questions you may have at our next project call, which is scheduled for **October 21 from 3-4 pm.**

Responsibilities:

CA CC Responsibilities

- Provide higher-performing school matches for county-identified targeted schools
- Provide funding to support proposed activities
- Provide technical assistance and advise on implementation as needed
- Facilitate monthly calls with participating counties
- Document implementation, impact, and lessons learned across counties

COE Responsibilities

- Identify one or more county staff to be consistently involved in the process
- Identify lower-performing schools for matching and visitation activities
- Design and support structured visits to higher-performing schools
- Involve districts associated with the lower-performing schools in the process
- Provide opportunities for teacher interactions during visits
- Facilitate school visit debriefings and follow-up activities
- Participate in monthly calls with the CA CC and other documentation efforts
- Submit brief summary report describing implementation, impact, and lessons learned

The Plan:

Project Goals and Intended Outcomes

- *Describe your county's overall project goals and intended outcomes*





Project Approach

Please consider the following questions in describing your plan:

- *What is your overall planned approach (e.g., one-on-one matching, instructional rounds)?*
- *How many schools do you plan to match?*
- *How do you plan to assess the readiness of the lower-performing schools?*
- *How do you plan to identify the strengths of the host schools?*
- *How do you plan to help the host schools prepare for the visits?*
- *How do you plan to help prepare the visiting schools?*
- *How do you plan to get districts involved in the process?*
- *How do you plan to provide opportunities for teacher interactions during visits?*
- *How do you plan to facilitate school visit debriefings and follow-up activities?*

Funding*

- *Provide a general description of how the \$10,000 stipend was spent last year and any amount remaining*
- *Provide a general plan for spending in the current year and the degree to which additional funds (beyond what was allocated last year) will be needed*

*As mentioned, funding for the current year is somewhat limited. How much we will be able to allocate is dependent on the number of participating counties and the degree to which some counties may have carry over from the prior year.

Please return to Mette Huberman at MHuberman@air.org or fax to 650-843-8200



Appendix D:
Host School Screening Questions

Host School Screening Questions

Opening Question

What are some of the key factors you feel have been most effective in achieving your school's high level of academic achievement? Can you give me some examples of why these have been effective?

EPC 1

What is the relationship between the use of current, state-adopted, standards-based instructional programs and student achievement in your school?

- What curriculum are you using?
- Do you monitor fidelity of the adopted program? If so, how?
- Do you use other programs above and beyond the core? If so, which do you use?
- Have you distinguished interventions between strategic and intensive?
- Are regular classroom teachers and RSTs aware of/using adopted interventions?

EPC 2

Has your schedule changed over time to address state guidelines and/or needs of students in ELA & Math in core and intervention programs?

- How do you “monitor” time in core instruction?
- How are instruction/practice managed for diverse learners in core? (Small groups/team teaching/additional adults?)
- How are intervention programs designed/managed?
- Have you developed a protocol for exit criteria from intervention programs?

EPC 3

To what extent are pacing guides used?

- Are the ELA, Math, and Intensive Intervention pacing guides aligned to the core ELA, Math, and Intensive Intervention curriculum?
- Has time for pre/re-teaching been built into the pacing guides?
- How are pacing guides generated?

EPC 4

What types of training have your instructional leaders been involved in? (Looking for involvement in Administrator Training Program – formerly AB 430 or SB 75 for both ELA & Math curriculum as well as training to monitor/support the full implementation of the EPCs)

- What was the impact of this program on what you do well?
- Are you currently engaged in any Professional Development or coaching to support your learning?

EPC 5

How has Professional Development contributed to your staff and school success?

- What plan is in place for achieving equitable distribution of teachers/administrators based on data, policies, programs, and research-based strategies?
- What ongoing and follow-up support for Professional Development is provided?
- Is Professional Development linked to data and single school plan/district plan?

EPC 6

Who are the instructional leaders at your school (principal, vice principal, coaches, teacher leads, other)? What are they responsible for?

- What is your system for selecting leaders at your site?
- How do these instructional leaders contribute to your school's success?

EPC 7

How are data used to make instructional decisions?

- What types of data are used to analyze student progress (e.g. unit assessments, benchmark assessments, formative assessments, CST, placement summative, screening, progress monitoring)?
- In what form do you analyze student data (Individually for all students, aggregated summary, by skill/content, by student subgroup)?
- Are formative assessments aligned to the core curriculum/CA content standards?
- Does your school have a data system in place? If yes, what is it? (Record name of system) How is this system used? Do you feel it has contributed to your success?
- Are you using data to place/exit students from interventions?

EPC 8

Do you have PLC/collaboration in place, on a regular basis? If so, what is your structure?

Collaboration Meeting Structure:

- What protocols and processes are in place to provide structure to collaborative meetings?
- To what extent do the principal or other administrators participate in or observe teacher collaboration meetings?

Collaboration Meeting Content:

- How is the review of student data used to improve instructional practices?
- How has the level of teacher collaboration led to improved student outcomes?
- How is collaboration effectiveness monitored?

EPC 9

What are you doing right at your school in regards to best practices coordinating your fiscal resources to support student achievement?

- Do you have and use latitude in being innovative in procuring funding from multiple sources?
- Who helps to make the decisions, such as private, state, and federal agencies?
- What additional funding sources have you successfully accessed?

Instruction

Have you focused with staff on effective instruction?

- What is the district/school system to identify and monitor instructional strategies and pedagogy that are effective for basic, strategic, intensive, ELD and high achieving students?
- Is there a system to assess instructional program effectiveness? (Involving collaboration, PD, walkthroughs, shared expectations and frequent progress monitoring)

High Expectations

Are there instructional norms that your school has adopted that center around high expectations? If so, what are they?

- How does your master schedule reflect high expectations for students, both while they are at your site and after they graduate?
- Have there been any significant changes in your graduation requirements over the past 3 years?
- How do you communicate and/or recognize academic and high expectations achievement at your site?
- How are students that are not meeting the high expectations supported?

Follow-Up Questions

To what extent do you think it would be possible to transfer the strategies you have developed at your school to a similar school in your region of the state that is currently struggling?

Is there anything else you would like to tell be about your school's success in beating the odds of student achievement?

Would you consider a request from an struggling school to visit your school to see your school's success in action? If so, when would be a good time this school year for a visit?

Appendix E:
Tips for School Visitation Process

TIPS FOR SCHOOL VISITATION PROCESS

Here are some useful tips for conducting effective school-to-school professional development visitations.

For the County Offices:

1. **Match the Host Schools and Visiting Schools around an issue of common interest as well as on demographic data.** While it is important for the Visiting Schools to see success with students like their own, they must also see that the Host Schools are tackling similar issues in areas such as professional development, instruction, school climate and discipline, and parent engagement. (Think “affinity grouping”.)
2. **Actively participate with the district and school teams to develop the budget, time line, materials and plan the visitation.** (Cost items that add up quickly include substitutes, duplicating materials, gifts/favors and refreshments!)
3. **If travel is involved for the Visiting School, consider negotiating a reduced rate for hotel rooms at a location near the school.**
4. **Set up the visit to be a two-way, mutually beneficial experience for both the Host and the Visiting schools.** Help the Host School plan to receive feedback either in writing or verbally from the Visiting Schools. (This promotes mutual respect between the schools as well!)
5. **Set clear goals for the visitation experience for *both* the Host and the Visiting schools:** For example:
 - Host schools will reflect on their own instructional practices, learn from their visitors, and strengthen their process for continual improvement.
 - Visiting teams will become familiar with research-based, effective instructional strategies put into practice by the host site.
6. **Collaborate with the Host School Coordinator to prepare (even rehearse!) the staff and students who will be presenting during the visit.** This is so important, don’t assume that the host school will know how to share their story effectively and in a way that will benefit the visiting schools! Talk with them about the points they should consider that are outlined in the next section.
7. **Encourage the Visiting Schools to engage in a Gap Analysis or other process to identify specific practices that they need to learn more about and hope to see during their visits to the Host Schools.** (See below.)

8. **Create an observation tool for the Visiting Schools to use during the visit.** Review the observation tool with the Host Schools and help them to consider how to highlight key points and strategies that helps the Visiting Schools really “see” what is taking place. (Make the observation come to life for the Visitors!)

For the Host Schools:

1. **Reflect on the following:**
 - What is your purpose in sharing what is happening at your school?
 - What current successful instructional components should be the focus of your sharing?
 - Who will be responsible for leading the planning and preparation for the visit?
 - What is the role of the district and how will you engage them in the process?
 - What is your capacity to provide support and assistance to Visiting Schools after the visit has ended?
2. **Don't forget to include students as tour guides, escorts and/or presenters during the visit.** This is particularly important as it gives visitors an opportunity to ask questions of students WITHOUT disrupting students while they are in class!
3. **Select presenters who know the history of the school well enough to answer questions from the visitors.** The staff person with the most flexible schedule to “entertain” the visitors may not be the best person to share the Host School’s story effectively and answer questions.
4. **Include both quantitative and qualitative data about your school/programs.**

Quantitative Data examples:
Test Scores Student demographics
Graduation rates Attendance

Qualitative Data examples:
Survey results Anecdotes
Summarized observations data Summarized focus group data

 - Share data about the staff and other school resources that are central to the improvement story.

- While you don't have to share the amount of your various funding sources, it is helpful to share *what* funds you have and *how* you used them to support your improvement efforts.
- 5. Consider the following:**
- Room set up (seating arrangements, and displays).
 - Videos or web-site demonstrations
 - Schedule of classes, tests, etc.
- 6. "Sharing Your Story" – Consider the following:**
- What were the events or circumstances that started your school on the path to improvement?
 - What are the key events that have been important over time?
 - Who was involved in these key events? (Important to note the role of all key stakeholders including: administrators, teachers, other staff, students, parents, community and business members)
 - What were the key obstacles that you had to overcome?
 - Were there any "surprises" along the path to improvement?

For the Visiting Schools:

- 1. Reflect on the following:**
- What is your purpose for visiting another school?
 - What will you be looking for?
 - What current successful instructional components should be the focus of your visit?
 - Who will be responsible for leading the planning and preparation the team for the visit?
 - What is the role of the district and how will you engage them in the process?
- 2. Engage in a "Gap Analysis" process or other process to identify specific practices you need to learn more about and hope to see during your visits to the Host Schools.** The Gap Analysis is a process that includes defining key action steps that involve implementing best practices and setting a timeline for implementation. In a nutshell:
- a) Identify an area such as instruction, parent engagement, or professional development that is important for your school to address.
 - b) Describe the current practices at your school in this area. ("Where are we now?")
 - c) Describe the goals that you have identified for improvement in this area. ("Where do we want to be?")
 - d) Identify the obstacles that hinder you reaching the goals.

- e) Identify the action steps (best practices) that you need to implement to move forward. (“What do we need to do to move forward?”)
 - f) Describe what success will look like. (How will we know we are successful? What will be our evidence of success?)
3. **Include staff on the visitation team who will really act as “sponges to soak up” the information and then to share it effectively with the staff back at the school.** This is extremely critical, as so often the “visitation strategy” fails because the staff cannot effectively re-tell what they saw for their colleagues their site nor apply what they learned to their own situation.
 4. **Do you want to include students or parents on the visitation team?**
 5. **What other “stakeholders” should be included in the visitation team?**
 6. **Consider whether you need to “divide to conquer”. Are there specific areas for each member of the team to pay attention to?**

Appendix F:
Instructional Rounds Protocol

INSTRUCTIONAL ROUNDS PROTOCOL

The process of describing of classroom practice inheres not in the complexity or sophistication of the protocol, but in the focus of the description and in the laser-like emphasis on the cause-and-effect relationship between what we see teachers and students doing and what students actually know and can consequently do.

A simple protocol makes it easier to describe the relationship between what we see in classrooms and the predicted consequences for student learning.

Focal Questions:

1. What are teachers doing and saying?
2. What are students doing and saying?
3. What is the task?

In addition to the three focal questions, here's a **short list of what to note in classrooms**:

- What grade is it? What content area? How many students are present? How many girls? How many boys? How many adults? How many minutes into the class are we?
- Task: What are students being asked to do? What are they actually doing?
- Patterns of Interaction: Is it teacher-student-teacher? Do students talk with each other? Do students initiate conversations or are they always responding to the teacher?
- Questions: What questions are being asked? Who's asking them? What are the responses to the questions?
- Time: How much time is spent on what activity? Also note time periodically through the description as part of mapping what we see.

Questions to Ask Students:

- What are you learning? What are you working on?
- What do you do if you don't know the answer or you're stuck?
- How will you know if you are finished?
- How will you know if what you've done is good quality?

GUIDELINES FOR DESCRIBING

Focus on Description: Instructional Rounds participants provide evidence of what they see – without judgment or inference, without decision. *This process requires us to unlearn the habit of deciding what we like and feel to look with fresh eyes to see what is happening in and across classrooms*

Use “Small-Grain” Evidence – Pebbles, not Boulders to build a Foundation:

To support discussions about the utility of evidence pieces, we refer to “grain size” in working with networks. The term grain size comes from, among other places, photography in the era when cameras only used film. When a photograph is taken under conditions of very low light, with a very fast film, you get a very fuzzy, grainy picture with low resolution around the components of the images. When an image is fuzzy, the grain size is large. It may be hard to distinguish the elements in the photograph. As conditions change, the image grows sharper and the graininess decreases. The smaller the grain size, the clearer the image of what is happening in the classroom.

The more general the description, the more room there is for fuzziness or interpretation and the more general our predictions and thinking about the next level of work tend to be.

When you discuss evidence, ask “How is that relevant for what is happening in the classroom?”

Also note . . .

✓ **Avoid Dogs that Don’t Bark: Statements about what’s not there . . .**

Avoid talking about what you don’t see. For example, “There were no lesson objectives posted on the board.” These reflections present what the observer considers an effective classroom, not what’s occurring in the current observation.

✓ **Take Written Notes when Observing**

INSTRUCTIONAL ROUNDS DEBRIEF

Option 1: Description and Analysis

On your own (about 10 minutes):

1. Read through your notes.
2. Put a star next to pieces of evidence that seem relevant to the school focus.
3. Select five to ten pieces of evidence. Write each on an individual sticky note.

With your small group (about 30-40 minutes):

4. Share evidence of each classroom you visited. Help each other stay in the descriptive voice. (What did you see/hear? What makes you think that?)
5. On chart paper, group the evidence in ways that make sense to you. Single pieces of evidence can be a “group.” If a piece of evidence belongs in more than one group, copy it onto multiple sticky notes.

Alternative: If you are using external standards (such as school developed tool, Bloom’s Taxonomy), as you discuss each classroom, use the external standards to sort your stickies. Add pieces of evidence to the “relevant/important” category on a separate chart.

6. Label your groupings.
7. Identify 3 patterns.
8. Other relevant/important evidence

With your partner group (fifteen to 20 minutes):

9. Designate a facilitator (a task master!)
10. Compare your charts and identify patterns and contrasting elements.
11. Fill in a four-quadrant grid that summarizes the two charts that each of the small groups has when they get together.
 - Patterns
 - Contrasts
 - Evidence specific to the problem of practice
 - Questions

With the whole group (10 minutes)

12. Debrief what the groups have learned. What patterns do people see? What do people wonder?

Option 2: Description and Analysis for Multipart school focus

On your own (about 10 minutes):

1. Read through your notes.
2. Put a star next to observations that seem relevant to the problem of practice. Try to pick at least one piece of evidence for each of the school's questions in its problem of practice.

With your small group (about 40 minutes):

3. Choose a facilitator/timekeeper.
4. Posted on the wall are three to five pieces of chart paper, each with different aspects of the problem of practice. Each small team spends a few minutes at each piece of paper discussing the evidence that the team saw that pertains to this question. Groups then move on to the next chart paper and add their evidence to the evidence that the previous group added.
 - a. Alternative: Stay seated with your small group. Spend 5-10 minutes per question. For each question, each person shares a piece of evidence. Once everyone has shared a piece of evidence go around again and share other evidence, or open up the conversation for broader discussion of the evidence you saw related to that question. After you have addressed the questions, spend 3 more minutes discussing "Other" – are there other things you noticed that you want the host leaders to think about?
 - b. In partner groups: Share your evidence and discuss what patterns you notice across evidence. Spend five minutes on each question and 3 minutes on "Other." Concisely summarize 3 patterns you notice on chart paper and post your paper.
5. Help each other stay in the descriptive voice. (What did you see/hear that makes you think that?)
6. Finish with a "Relevant" category on a separate chart.

With the whole group (10 minutes)

7. Share patterns the group saw. What did people notice in the "relevant" category?

Prediction

The goal of this step is to connect thinking and learning.

Groups ask: If you were a student at this (class) school and you did everything you were expected to do, what would you know and be able to do?

Central Questions:

What causes the learning we want to see?

What specific teaching moves, kinds of tasks, what forms of student engagement lead to powerful learning for students?

1. Individual groups write brief description of what they agree students would know and be able to do in individual classrooms or across the school.
2. These are written on chart paper, posted and the group does a gallery walk to review.
3. There is a whole group discussion to reach agreement on the

The Next Level of Work:

During the next-level-of-work phase of the rounds, network members think together about what resources should be and what kinds of support will best meet the needs of teachers and administrators at the host site to move instruction to the next level. The more specific the suggestions, the more helpful they are – Facilitators help the group move beyond general suggestions such as “form study groups” to identify concrete and specific steps to link administrative support to teacher action in the way they previously linked teacher moves to student learning. This may be the most difficult step of all . The next step is for the network members to apply what they’ve learned in their own context Facilitator may assign “homework” to ensure this happens. Suggestions focus on what type of resources and support is needed for teachers and principals to think and act in a new way .

One form - suggestions are written in 3 columns: next week; next month; by the end of the year

Follow-Up Happens Outside the Network:

Make the work public. Networks should include time for people to share how they are applying their learning outside of rounds. People get good ideas from colleagues and receive essential reminders that learning doesn’t stop when they leave the host school. That’s when the real work begins.

Four Quadrant Evidence Sort

Patterns	Contrasts
Evidence that Supports POP	Questions

Appendix G:
Instructional Rounds After-Action Review

Instructional Rounds After-Action Review

What did you see? What did you hear? Students working together in ability-based groups and checking each others' work. Partner work. Students on-task and knowing what to do next. Learning/lesson-focused chatter. Students talking about what they were learning, articulating what they were thinking, oral reporting. Use of academic vocabulary. Use of whiteboards.

Instructional tours that are checklist-driven and percentage-based are not meaningful. Instructional rounds, in contrast, are collaboration-based and start and end with classroom practice; it's staff development for the observer and the observed because of the conversations that take place among colleagues about what you saw and what you heard.

After-Action Review (a protocol whose origin is the U.S. Army):



Fig. 1 District Administrator facilitating a think-pair-share.

Action: Instructional Rounds at Elementary School		Date: 02.15.11	
<p>What did we plan to do?</p> <ul style="list-style-type: none"> * We planned to observe instructional rounds and familiarize ourselves with the practice since we're considering adopting it as a district. * We planned to observe students learning behaviors, the interaction between the student and the curricular content. * We planned to give feedback on the problem of practice. 		<p>What did we do?</p> <ul style="list-style-type: none"> * We spent 20 minutes in each classroom observing students and participating in the process of instructional rounds. * We discussed and processed what we observed. * We refrained from being judgmental, yet we felt impressed. 	
<p>What did we learn about the school?</p> <ul style="list-style-type: none"> * We saw that they identified a problem of practice and committed to working hard on it. * We saw so much common approach that we wondered what percentage of the staff was new to teaching or new to the campus and if that lent itself to the great things that were happening on their campus. * We saw, for the most part, cohesiveness; there were a couple of outlier classrooms, but most teachers were on board. * We saw some teachers were more comfortable than others 		<p>Next steps for District Schools?</p> <ul style="list-style-type: none"> * Instructional Rounds seem like a good thing, if the focus is clear and concise, if there is a commitment to process norms across campuses and the district, and if there is proper training of teachers beforehand; it can't just be because we're checking off a box for Program Improvement; there must be trust and it must be non-judgmental, non-evaluative or some teachers won't be on board. 	

<p>with being observed.</p> <ul style="list-style-type: none"> * We saw processes and procedures being ingrained, so that when students got to the upper grades, they knew what to do. * We saw flow maps on the board in every room, but not being used in any room. * We learned that the school has really redefined themselves and what's remarkable is that it was not mandated that they do so. <p>What did we learn about and from the rounds?</p> <ul style="list-style-type: none"> * We learned that the process was very interesting but it was difficult not to pass judgment. * We would have gotten more out of the rounds if we had been closer to grade level and if it had been done on our own campuses, with our own colleagues. * We would have gotten more out of it if we knew why we were doing this. We need more information about the usefulness of this process and a conversation about how worthwhile it is. * We learned that our classrooms don't look like theirs. * We learned that just because the rounds are happening doesn't mean that change is happening. * We're not sure if this process would work as well at the upper grades as it seems to at the lower grades. * We learned that teachers being observed need to have more of an opportunity to be aware of what they were doing, defend themselves, in essence. * We learned that there's a big difference between observing direct instruction and student learning. * We learned that teachers visiting other teachers' classrooms is a good thing. * We were reminded to ask ourselves how do we know that our students are learning, to keep that in the back of our minds, and to look beyond data to demonstrable behaviors. 	<ul style="list-style-type: none"> * There are so many models for this type of thing. Who chose this model? Where was the teachers' voice (shared decision making)? * What will it look like? Who will be coming in? The specificity must be known before we even say yes or no. * Teachers tend to say that their best trainings occur when they go into other teachers' classrooms. We could make this available and see what happens. * Where does this fit in with the district's goals and each site's goals for improving instruction? Sites should be able to choose when and how to implement this process. * Trialing it at some sites in the district, as opposed to imposing it for all sites in the district. We would need teachers to want to do this. * Rounds must be done by teachers of other teachers (not clerical or food service staff, for example) from the same school site to be most helpful, otherwise observers do not know the culture and climate of the campus and do not understand instruction. * We have so little planning time, so little collaboration time, but so many standards and mandates. Early adopters should be encouraged, but late adopters should not be forced. * Is there money to hire subs to cover our classrooms while we observe our colleagues? * We have half of our staff doing Project Lead, which does exactly this and a lot of money is allocated to it. * We tend to turn tools into programs. If we make sure that this is a tool in our toolbox that teachers/sites can draw upon, that's fine. Rounds are a tool and sites need to be free to choose to use that tool. * We need to go s-l-o-w.
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