LIFT EDUCATION

Leading Innovation for Tennessee Education (LIFT) is a small group of superintendents working together to explore innovative approaches and share best practices that benefit students, other superintendents, and other school districts. First convened in 2012 to support high academic standards in Tennessee, the network broadened its work in 2014 to focus on directly improving student outcomes. The State Collaborative on Reforming Education (SCORE), a nonprofit and nonpartisan research and advocacy organization based in Nashville, formally convenes the network. TNTP, a national nonprofit focused on supporting states and districts to end educational inequities, serves as a content partner for academic work. This partnership—combining knowledge of Tennessee’s context and people with a nationally recognized partner for academic success—has been key for our network.

Since March of 2016, one of LIFT’s primary areas of focus has been improving early literacy instruction in its member districts. After examining their existing literacy programs, classroom practices and student results, LIFT directors adopted a shared problem of practice:

K-2 students are not yet accessing a high-quality literacy program that lays the foundation for meeting rigorous standards. District teachers and leaders have not yet fully made the shifts that ensure implementation of those standards.

The LIFT network’s focus on early literacy followed a larger early literacy effort by the Tennessee Department of Education (TDOE). In early 2016, TDOE published Setting the Foundation: A Report on Elementary Grades Reading in Tennessee, outlining several state-level initiatives, including a statewide model for literacy coaching, a strong focus on literacy instruction across educator preparation programs, new assessments for K-2 ELA teachers, and additional collaboration with districts on Response to Intervention (RTI) and English Language Arts (ELA) research. Participation in these initiatives has strengthened our work as a network.
From spring 2016 to summer 2017, the LIFT districts focused on addressing the stated problem of practice by building the capacity of teachers and leaders and by piloting new, standards aligned instructional materials. By May 2017, LIFT districts made significant progress in K-2 ELA:

- A third of pilot classrooms showed some or full alignment to the Tennessee ELA standards, compared to less than 10 percent during initial diagnostic visits.
- Almost six in ten pilot teachers felt “more supported” because of the pilot.
- More than seven in ten pilot teachers reported that the pilots “benefit the students” in their districts.

Encouraged by this progress, the LIFT districts continued to invest in early literacy and the instructional materials pilots. During the 2017-18 school year, LIFT districts focused on achieving a depth of instructional change in grades K-2 ELA and expanding the breadth of work by including grades 3-5 in the networks’ problem of practice.

By May 2018, LIFT districts demonstrated sustained improvement in K-5 ELA:

- More than half of lessons observed during spring 2018 showed some or full alignment to the Tennessee ELA standards.
- About two-thirds of foundational skills lessons involved in piloting strong materials provided students with opportunities to master foundational skills, compared to about one-third of lessons during the initial diagnostic.
- Teachers and leaders continue to be invested in the direction of the work. Nine in ten teachers reported “using the instructional materials throughout the year,” and nearly seven in ten teachers agree that the new materials “benefit the students” in their districts.

This guidebook codifies the work and lessons learned from the original LIFT districts, cataloging processes, tools, and support LIFT districts have used to affect change. The guidebook will be constantly evolving, but is currently organized into eight chapters:

- 4 Chapter 1: Introduction to LIFT’s Work and Early Results
- 10 Chapter 2: LIFT’s Approach to Change
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- 19 Chapter 4: Evaluating & Choosing High-Quality Instructional Materials
- 23 Chapter 5: Piloting High-Quality Instructional Materials
- 28 Chapter 6: Long-Term Leader & Teacher Knowledge- and Skill-Building
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Each chapter also includes an appendix of materials collected from LIFT districts: sample schedules for implementation; annotated lists of materials; guidelines for pilot designs; session materials for teacher- and leader-training sessions; change management strategies; progress-monitoring tools such as surveys; etc. Many of these resources can also be accessed directly at the LIFT resources website.
Defining the Problem

The LIFT network is dedicated first and foremost to improving outcomes for students. In recognition that many well-intentioned, and even research-based, reform efforts have fallen short of meaningfully improving student literacy outcomes, the LIFT districts are continually seeking methods that have the best chance of improving student learning. With this priority in mind, LIFT districts approach their work with an “improvement science” lens.

Improvement science is a framework to help complex organizations, such as school districts, get better at getting better. Most improvement science literature centers on the idea that rapid testing of changes can guide the development, revision, and fine tuning of new approaches to ensure changes lead to improvement. This ongoing testing should focus on three questions:

1. **What, specifically, is the problem we are trying to solve?**
2. **What change might we introduce and why?**
3. **How will we know that change is actually an improvement?**

The LIFT network used these guiding questions to narrow in on the network’s initial focus and provide direction for the shared work, and continues to refer to them to study and improve its efforts.

To begin work to improve early literacy, the LIFT network needed to define the shared “problem of practice.” In other words, **what, specifically, was the problem LIFT districts were trying to solve?**

Most LIFT districts participated in instructional reviews led by TNTP (see Chapter 3 for more detail). This review included knowledge-building sessions about early literacy for district staff, visits to 20-30 K-2 ELA classrooms, and debrief sessions to plan next steps.

The network then came together to identify common trends across the district instructional reviews. A common theme emerged during these reviews: while most K-2 ELA classrooms were teaching foundational skills (including phonics, phonemic awareness, concepts of print, etc.), few were systematically building students’ vocabulary and knowledge of the world through engagement with rich, complex text appropriate to their grade level. The districts then engaged in a root cause analysis to further refine the problem that was most critical to solve. Through this process the districts articulated the following problem of practice:

**K-2 students are not yet accessing a high-quality literacy program that lays the foundation for meeting rigorous standards. District teachers and leaders have not yet fully made the shifts that ensure implementation of those standards.**

While there are many related challenges facing our students, teachers, and school systems, LIFT agreed as a network that this was a key priority area and would be our collective area of focus.
LIFT’s Theory of Change

After identifying the shared problem of practice, the LIFT districts next considered what change they might introduce, and why they believed that change was the right next step. The districts reviewed relevant research, considered their unique contexts, and landed on a clear and shared theory of change.

Across LIFT districts, we believe that strong instructional materials that reflect the demands of the Tennessee standards will drive significant improvements in classroom instruction. We have used the triangle image below to illustrate a more comprehensive theory of action and to draw attention to the many interrelated aspects of leading instructional change at scale.

In the past, many of the LIFT districts had teachers create or compile ELA instructional materials; the Tennessee Educator Survey reveals an alarming finding: “the average K-3 reading teacher spends 4.5 hours per week creating or sourcing materials for daily reading blocks.” Further, when we went into classrooms, we found inconsistencies in the strength of these materials.

Given the work we knew was ahead of us in improving ELA outcomes, we wanted all teachers to have a foundation for their practice and students to regularly experience rigorous content. While teachers can create strong instructional materials on their own, their time is limited and valuable—and we believe preparing for strong lesson implementation is a better use of that time than searching for and compiling resources. Again, educators agree: “almost half of instructional coaches help teachers obtain resources and materials on a daily basis though few coaches deem this one of the most effective uses of their time.”

Academic studies show growing evidence that the instructional materials teachers use matter as much as great teaching. The Louisiana Department of Education, in cooperation with the RAND Corporation, published a 2016 report outlining the importance of instructional materials in their recent successes. Research and best practices show us that an effective instructional core has two components: excellent content and excellent teaching.

To this end, LIFT districts decided that a pilot of instructional materials for K-2 read-alouds/knowledge-building lessons was a strong way to anchor the work (starting in the 2016-17 school year). Read-alouds in the early grades help students build knowledge of the world, vocabulary, and speaking and listening skills before they are able to read complex text on their own.

While LIFT decided to start with improving K-2 read-alouds, LIFT districts noted that improvement was also needed in foundational skills instruction. In the 2017-18 school year many LIFT districts began piloting strong foundational skills materials and introducing stronger instructional materials in grades 3-5.
LIFT Results

Given our shared problem of practice and theory of action, the LIFT districts began implementing materials pilots, always considering our third improvement science question: are we seeing changes, and how will we know that change is actually an improvement?

The results from the first two years working with strong instructional materials are compelling. In diagnostic visits before the launch of pilots, three quarters of classrooms showed no evidence of the instructional shifts required by the Tennessee ELA standards; by spring 2018 more than half of observed classrooms showed some or full alignment to the standards, and fewer than one in ten classrooms showed no evidence (see figure at right). District leaders report anecdotally that classrooms that did not participate in the pilots did not see the same degree of change, indicating that the shift toward reflecting the standards was driven by the implementation of strong instructional materials.

Overall, did the lesson reflect the shifts required by the TN Standards?
All lessons observed SY 16-17 and SY 17-18

<table>
<thead>
<tr>
<th>Spring 2016 (n=53)</th>
<th>Spring 2017 (n=141)</th>
<th>Spring 2018 (n=179)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>Yes, but only in some areas</td>
<td>Not really, but there were some promising practices</td>
</tr>
</tbody>
</table>
Of particular importance was a shift in the quality of texts in classrooms. In diagnostic visits, only 21 percent of lessons were centered on a high-quality, complex text. By the end of the first semester of implementation in districts piloting strong instructional materials, a staggering 86 percent of lessons were centered on high-quality, complex texts after just one year of implementation. This change translated into significantly more time for students to interact with complex text, high-quality vocabulary, and complex ideas in early grades classrooms, an improvement in practice that pilot classrooms sustained in the second year of the pilot, both in the classrooms of the original pilot teachers (who become “SY 17-18 Year 2 Implementors”) and teachers who started using the materials in the 2017-18 school year as districts scaled up usage (the “SY 17-18 Year 1 Implementors”; see figure at right).

Teachers implementing strong instructional resources also indicate that they like the instructional materials and that the materials benefit students. In an April 2018 survey of 283 teachers using strong materials across nine districts, most teachers indicated that the instructional materials support their practice:

- 69 percent agree or strongly agree that the materials are easy to use;
- 61 percent agree or strongly agree that they feel more supported as a result of the materials;
- 67 percent agree or strongly agree that their students’ vocabulary is growing noticeably with these materials; and
- 66 percent agree or strongly agree that, overall, the materials benefit the students in their district.

The LIFT Network has also gathered teacher feedback in focus groups and in open response questions on surveys. In the February 2017 pilot teachers were asked to share their experiences with the new materials, and in open response questions teachers have noted that materials “didn’t involve a lot of work for the teacher. [They were] laid out well and I liked the flow of it.”

Teachers also saw the benefits for students: “The outcome with these materials is AMAZING. My students’ vocabulary has grown tremendously, and they are really digging deep into these books. I hear them having conversations that I haven’t heard them have before.”

Teachers found the materials were particularly beneficial for struggling students: “I also love the confidence [these materials have] given my lower [performing] students!”

Several LIFT districts also participated in a parent and family survey in May 2018. Nearly eight in ten parents stated their child is becoming a better reader due to the instruction he/she is receiving in school. In reference to the new instructional materials, one parent stated: “my child has grown leaps and bounds this year.” Another parent commented: “I was very impressed with the reading program this year. I have two children in grades K-2, so I was able to compare it to the previous curriculum.”

We want to be clear: these successes are early evidence of progress. Across the network, about half of lessons using strong materials are not yet aligned to standards. While we know the journey to stronger literacy results is far from accomplished, we are encouraged by the progress we’ve seen thus far and believe we are on the right path to improvement.
Lessons Learned

In the spirit of continuous improvement, the LIFT districts continuously reflect on our shared work with the goal of strengthening our efforts and impact. In early implementation we learned several key lessons which have reinforced our theory of action:

Lesson 1: Strong instructional materials are an essential tool in improving early literacy instruction.

Research shows that if schools adopted more rigorous textbooks, student achievement could significantly improve. Although the effectiveness of the teacher still remains the most important factor determining student achievement, new research shows that strong instructional materials can have larger positive impacts on student learning than other common interventions, such as class-size reductions, and generally offer a more cost-effective intervention. To this end, LIFT districts decided that a pilot of instructional materials for K-2 read-alouds/knowledge-building lessons was a strong way to anchor the work.

Lesson 2: Teachers must engage in resource-specific, job-embedded professional learning experiences to improve practice.

Materials alone aren’t a route to universally strong early literacy instruction. Sustained, resource-specific, and job-embedded support is needed to help teachers implement the materials well.

Lesson 3: Content area knowledge is essential for both district- and building-level leaders to improve instruction.

District and building leaders have directly led this change effort in their districts over the past year. To do this effectively, they’ve needed deep knowledge, particularly around the nuances of the standards, shifts, early literacy instruction, and instructional materials. This is especially true for district leaders, who are regularly required to make decisions about resource allocation, schedules, budgets, timelines, and other key elements that influence the instruction students’ ultimately experience.

Lesson 4: Change management is critical to systems-level course adjustment.

Sustained, thoughtful change management is critical to short-term and long-term success of improved early literacy instruction. By change management, we mean a consciously planned set of activities that engages stakeholders in decision-making, communicates rationale and direction, and continuously gathers feedback throughout the change process.

These lessons continue to fuel the learning of LIFT districts as they expand the breadth and depth of their work. These lessons also shape the recommendations and resources included in the LIFT guidebook in the chapters to follow. The guidebook concludes (in Chapter 8) with lessons we are considering for the future as we continue to refine our work.
Our Recommendations for Districts

Based on these lessons, we believe districts should consider high-quality instructional materials pilots, adoption, and implementation efforts as a key way to drive instructional improvements. We do caution that materials are not a panacea; they must be embraced as a change effort and implemented well, including careful building of leader capacity and teacher knowledge. The rest of this guide is structured to support materials selection and implementation. In the coming chapters, you’ll learn about a process for evaluating and piloting high-quality instructional materials, along with information about developing teacher and leader knowledge to accompany the implementation of those materials. What follows in Chapters 3-7 is more specific guidance for each of the steps, in order, the LIFT districts have taken.

In addition, we recommend considering the ideas of “improvement science” to other districts. In addition to the three questions shared in this chapter, the LIFT network has also leveraged the Plan-Do-Study-Act (PDSA) framework, shown below.

Using this cycle, each district regularly specifies a challenge to focus on within their implementation and strategy, designs a change to improve that problem, studies the success of the action, and uses the gathered information to inform next steps.

Given their similar contexts, LIFT districts often focus on similar challenges and leverage the knowledge of the network to gather ideas for what action to take, how to best implement the change, and how to study the results of the change.

Many of the lessons and resources shared throughout the guidebook are products of the PDSA cycles LIFT districts complete.

Resources

LIFT Resources
- LIFT Network PDSA Planning Template
- LIFT Session: Improvement Science
- SCORE Sheet blog post: The Importance of Strong Literacy Instructional Materials
- SCORE and LIFT overview slides

External research on the importance of instructional materials:
- The Carnegie Foundation for the Advancement of Teaching / The 90-day Cycle Handbook
- Learning to Improve: How America’s Schools Can Get Better at Getting Better, by Anthony Bryk / For a summary of this book, see this review from the Harvard Education Review
- A Primer for Continuous Improvement in Schools and Districts, by the Education Development Center
- Curriculum Research: What We Know and Where We Need to Go, by David Steiner
- Creating a Coherent System to Support Instruction Aligned with State Standards: Promising Practices of the Louisiana Department of Education
- Choosing Blindly: Instructional Materials, Teacher Effectiveness, and the Common Core, by the Brookings Institute
- Want All Students to Learn? Make Sure Their Teachers Get Great Content for their Classrooms
CHAPTER 2: LIFT’S APPROACH TO CHANGE

After defining the shared problem of practice and theory of action, the LIFT districts turned attention to implementing and studying change to ensure that their efforts led to improvement in student results. This chapter will explore how the LIFT districts planned for and guided implementation through the lens of change management.

Pursuing an Integrated Academic Strategy

As articulated by the “aligned systems and supports” portion of the LIFT theory of action, the network approaches the work with a commitment to thinking about the system as a whole. In planning the materials pilots, LIFT districts recognized that any change to the materials teachers use would have an impact on other elements of the district academic system.

The “Academic Strategy Levers” diagram below outlines common components of a district academic system and demonstrates how interrelated each are to one another.

LIFT districts routinely re-visit the Academic Strategy Levers in their planning and reflection. Even though one element might be a short-term focus, the other elements are never out of view.

<table>
<thead>
<tr>
<th>Stakeholder Capacity</th>
<th>Stakeholder Investment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do stakeholders have the capacity to realize the shared vision and implement and strategy to achieve it?</td>
<td>Are stakeholders invested in the shared vision and the strategy to achieve it?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Vision &amp; Expectations</th>
<th>Is there a shared vision of great teaching and learning?</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Curriculum</th>
<th>Assessment</th>
</tr>
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<tbody>
<tr>
<td>Do teachers have access to and use standards-aligned materials and resources that provide a pathway to achieve the instructional vision?</td>
<td>Do educators access and use quality assessments that provide timely, accurate data and enable educators to adjust instruction, allocate resources, and evaluate learning?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Student Support</th>
<th>Accountability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is there a data-driven system of student support that is effectively implemented to ensure that all students thrive?</td>
<td>Is there a system to monitor progress and hold educators accountable for improving student learning?</td>
</tr>
</tbody>
</table>
For example, when considering a pilot of new instructional materials, districts consulted the “levers” to ask themselves what impact the materials would have on each component of the system. A district might consider:

- Do we have a **vision** for strong instruction? How will our **vision** shape the materials we select?
- What **capacity** will our **teachers and leaders** need to implement the new materials?
- How can we build **investment** in the new materials, including in **educators, families, and community members**?
- What implications will new materials have on our **assessment strategy** in the district? Are there assessments we need to stop using? Are there gaps in our **assessment landscape**?
- How will new instructional materials align with our district’s approach to **supporting all students**, including through RTI?
- How will the system be **accountable** for taking on this change? How will we know that the changes are leading to improvements? What will we measure and when will we discuss our results to refine our strategy?

This list of questions is not exhaustive but demonstrates the type of thinking the LIFT districts have found is essential to building a coherent strategy. See the Pilot Planning Template in the “Resources” section for a tool used by LIFT districts to work through these questions. The following chapters in the guidebook will also explore each of the “levers” in greater depth and how they intersect.

While planning for coherence on the front end of any change is critical, these questions are iterative and attending to alignment across the system is an ongoing effort. Without attention to building a coherent academic strategy, we often hear about initiative fatigue and/or the challenge of competing initiatives. This phenomenon is often captured as “doing everything but nothing well.”

The LIFT districts aspired to create a different reality for teachers and schools: to have clear priorities across the system and to pursue excellence in those areas.
Managing Change

In sharing lessons from early work, the LIFT districts emphasized that “change management” is critical to short-term and long-term success of efforts to improve early literacy.

By change management, we mean a consciously planned set of activities that engages and invests stakeholders (teachers, coaches, students, parents) in decision-making, communicates rationale and direction, and continually gathers feedback throughout the change process. We also mean approaching planning with an eye for “backwards design” – so that immediate next steps are intentionally positioned within the overall trajectory of change in the district.

In addition to leveraging the improvement science tools described in Chapter 1, the LIFT network has engaged with the Concerns-Based Adoption Model (CBAM Model) to support our thinking and conversation about intentional change management. In particular, the LIFT districts have used the Levels of Use (included below) to plan for a successful change.

Concerns-Based Adoption Model—Levels of Use

This chart describes what a person is actually doing in relations to implementing an innovation.

<table>
<thead>
<tr>
<th>Stage</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Non-use</td>
<td>The person is not using or not addressing the innovation.</td>
</tr>
<tr>
<td>1</td>
<td>Orientation</td>
<td>The person is acquiring information about the innovation through articles, information meetings, workshops, etc.</td>
</tr>
<tr>
<td>2</td>
<td>Preparation</td>
<td>The person is gathering the needed information, materials, and resources, as well as planning to begin use.</td>
</tr>
<tr>
<td></td>
<td>Decision Point</td>
<td>The individual establishes a date and time to begin use.</td>
</tr>
<tr>
<td>3</td>
<td>Mechanical</td>
<td>The person is implementing the innovation. Initially, a step-by-step process is carefully followed, there are occasional instances of failure, and participants spend a significant about more time planning and gathering materials and resources.</td>
</tr>
<tr>
<td>4</td>
<td>Routine</td>
<td>The person has become more comfortable with the innovation and is able to implement without the major time commitments required during the Mechanical Stage. The focus is on the comfort level of the individual, not the impact on the students.</td>
</tr>
<tr>
<td></td>
<td>Decision Point</td>
<td>The focus shifts from the individual to the students.</td>
</tr>
<tr>
<td>4b</td>
<td>Refinement</td>
<td>The person begins to plan and implement with a clear focus on improving the impact on students.</td>
</tr>
<tr>
<td>5</td>
<td>Integration</td>
<td>The person beings to actively seek out and collaborate with others on ways to improve the impact of the innovation on students.</td>
</tr>
<tr>
<td>6</td>
<td>Renewal</td>
<td>The innovation has become “internalized” within the person’s instructional repertoire. The individual begins to seek out alternate ideas, strategies, methods, and innovations. Note: At this point, the change process begins again.</td>
</tr>
</tbody>
</table>
The CBAM Levels of Use tool helps clarify a progression teachers and leaders experience during a change initiative. The model also posits that a change must persist through all the stages in order to result in the intended improvement. With this caution in mind, the LIFT districts consider how to support stakeholders through each stage, so that the change doesn’t lose momentum before reaching its intended outcome.

This understanding of change management influences each district’s choices for how to pilot instructional materials, how to engage stakeholders in choosing and implementing the new materials, how to build capacity throughout the system, and how to communicate successes along the way, among other planning considerations.

While there are many other valuable change management resources available in the field, the CBAM tool will be referenced throughout the guidebook as a common framework for thinking about managing the complex change of improving early literacy.
Our Recommendations for Districts

The LIFT districts offer two key takeaways from their approach to managing change.

1. **Plan for Change Management.**

   First, planning for change management is critical. This is not a task that will simply take care of itself; planning must be deliberate, ongoing, and include evaluations of efficacy. For example, in Fayette County, the superintendent and his cabinet stepped back on a regular basis last year to evaluate the progress of the pilot program, identifying key areas for support and discussing teacher sentiment and buy-in. In Loudon County, administrators laid out a clear plan for teacher and school leader input from the beginning of the year, including focus groups and intentional opportunities for teacher and leader input on the direction of the district plan.

2. **“Go slow to go fast.”**

   Second, districts found it is critical to “go slow to go fast.” Instructional materials pilots (rather than providing the materials at scale right away) allowed for experimentation and time to sort out the nuances of new materials without committing extensive resources and time at the outset. This “sorting out” often involved attending to unforeseen implications across the academic levers. For example, one LIFT district noticed the new materials didn’t align with the district report card structure, leading the district to revise the report card. Districts learned that attending to alignment across the system was more manageable with the small scale of the pilots.

   “By definition, improvement requires change. Unfortunately, in education, change too often fails to bring improvement—even when smart people are working on the right problems and drawing on cutting-edge ideas.

   …Propelled by a sense of urgency, educational leaders often plunge headlong into large-scale implementation. Invariably, the outcomes fall short of expectations. Enthusiasm wanes, and the field moves on to the next idea without understanding why the last one failed.

   Such is the pattern of change in publication: implement fast, learn slow, and burn good will as you go.”

   *Learning to Improve: How America’s Schools Can Get Better at Getting Better*

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**Resources**

**Change management**
- Concerns-Based Adoption Model Resources
- Improvement Science Session (from Dec. 2017)
- The “Change Wheel”

**District-level reform**
- Academic Strategy Levers
- Article: Transforming schools an entire system at a time (Fullan)
- Strategy in Action by Rachel Curtis and Elizabeth City

**Planning tools**
- LIFT Learning Pilot Planning Tool
- Pilot Expansion Planning Tool
District and building leaders have led change management in LIFT districts. To do this effectively, they’ve needed strong knowledge and a shared vision of excellence, particularly around the nuances of the standards, shifts, early literacy instruction, and instructional materials. This is especially true for district leaders, who are regularly required to make decisions about resource allocation, strategy development, budgets, timelines, and other key elements.

### Vision Building Among Leaders

LIFT districts have found that a key component of success in this work is to build a vertical spine of sponsorship; that is, to ensure that all levels of a district team—from superintendents and district leaders, to principals, to coaches, and teacher leaders—are equally invested in materials implementation. A key component in building this investment is developing a unified vision for excellent ELA instruction at all levels of leadership. Leaders in the LIFT network have participated in a wide-range of knowledge and vision building experiences, and the LIFT districts have been clear that investing in a shared vision for instruction is a non-negotiable component of improving early literacy. Districts have also clearly articulated that creating a shared vision depends on clear roles and responsibilities within the district team—particularly having one person with capacity and charge to lead the work (often called a “strategy lead”). These themes are explored throughout this chapter and the guidebook as a whole.
Instructional Reviews

At the launch of the LIFT early literacy work, TNTP conducted a diagnostic visit in each district—called an instructional review—to better understand how current policies and practices were supporting or hindering rigorous, standards-aligned literacy instruction. We highly recommend beginning similar work with this sort of “stock-take”, incorporating key decision-makers and stakeholders from multiple levels of a district in better understanding the current landscape.

Instructional reviews are intended to accomplish three objectives:

- Norm on a shared vision for excellent literacy instruction using the Instructional Practice Guide;
- Support leaders to understand the current state of literacy instruction in the district by co-observing and analyzing classroom instruction and student assignments; and
- Share trends from classroom visits and student work analyses to present a summary of current areas of success, areas for improvement, and recommended next steps.

LIFT’s instructional reviews generally take place over two or three days, depending on the size of a district. They may begin with convening district instructional leaders (generally the superintendent, central office academic leaders, principals, coaches, and occasionally teacher-leaders) to discuss the key elements of high-quality early literacy instruction and prepare to observe classroom instruction using a common tool (e.g., the Instructional Practice Guide).

Next, observation of instruction may occur in a sample of district schools (typically between 3-6) in small teams. It is suggested that teams observe instruction in each classroom for approximately 20 minutes, briefly discuss what they observed, and then comprehensively debrief trends in instruction at the end of each day. Throughout the instructional review, teams may collect data using the Instructional Practice Guide to assess alignment of instructional practice, compare instruction to the intent of the standards being taught (using the TN Academic Standards app), and a modified version of the EQuIP Student Work Protocol to assess the alignment of student work.

On the final day of an instructional review, the external observers (e.g., CORE Office ELA consultants, technical assistance providers, etc.) share trend-level data from these classroom visits and student work analyses and identify areas of success, areas for improvement, and recommended next steps. District leaders then discuss an action plan to approach these areas for improvement. During the action-planning phase, almost all LIFT districts chose to address the findings from the instructional review with exploration or adoption of new, standards-aligned instructional materials (see Chapter 1).

If you are uncertain about who to reach out to for assistance with walkthroughs, we recommend reaching out to your CORE office, as CORE office consultants are trained to complete these walkthroughs and can serve as a resource.
Early Knowledge-Building for Leaders

A key part of the instructional review process is building a common understanding of the ELA standards and shifts in practice amongst district instructional leaders. While the idea of college and career ready standards is not new, many educators reflect that they have not had the training or support to deeply understand what these expectations look like in action. The LIFT Network is dedicated to helping each district build a common understanding of the shifts and to continuously update its understanding as new research and practices emerge.

In order to create a shared action plan with buy-in from all stakeholders, they must agree on the common points of success and challenge against a shared vision for ELA instruction.

We build this knowledge and vision in several ways:

- Knowledge-building sessions during the instructional review
- Co-observing classroom practice with school and district leaders during the instructional review*
- Exploring curated pre-work and additional reading after the instructional review (see knowledge building materials linked in the “Resources” section below)
- Arranging visits to other districts to complete walkthroughs in classrooms that are implementing high-quality materials*

*These are strategies we suggest you continue to use throughout your first years of implementation to continue developing your shared vision of excellence for early literacy.
Action Planning

Another key component of the instructional review is an action planning process based on the findings of the review. We’ve found that a few things are critical to think about early on in the process:

• Ensuring a broad base of support for new initiatives, especially instructional materials exploration or adoption. It’s essential to have strong buy-in from district leaders, but also from school leaders who will be asked to support or lead the work, coaches who will support teachers, and, of course, teachers themselves. Several LIFT districts incorporated focus groups into their early action planning, soliciting feedback from both teachers and school leaders on different sets of instructional materials before selecting one or two to pilot.

• Having clear “leads” and “sponsors” for the work has also been critical. In most LIFT districts, superintendents have been “sponsors” for the work, lending institutional support to the effort and ensuring that early literacy was a priority for the district. In each LIFT district, there is also an identified “strategy lead” (often a CAO or literacy lead for the district) who pushes the day-to-day work forward.

• Monitoring progress is also a key component of change management. District leaders work hard to identify incremental signs of progress as new instructional materials are used, generally using the IPG as a framework to measure improvement.

• Staring small (“go slow to go fast”) is key. We highly recommend starting with a small pilot of instructional materials (see next chapter) in order to slowly build buy-in and support.

Resources

Instructional Review Materials

- Instructional Review Sample Agenda
- Sample Day 1 knowledge-building and introductory slides
- Sample Day 2 knowledge-building and introductory slides
- Student Achievement Partners’ Instructional Practice Guide (IPG)
- LIFT’s modified version of the Instructional Practice Guide (IPG)
- EQuIP Student Work Protocol
- Teacher Focus Group Protocol
- Session on Teacher Investment
- Sample Action Plan

Knowledge-Building Materials

Academic Standards Research and Resources:

- Effect of Prior Knowledge on Good and Poor Readers’ Memory of Text (The Baseball Study).
- Reading Between the Lines (The ACT Study)

Books:

- “The Knowledge Deficit” by E.D. Hirsch, Jr.
- “Why Knowledge Matters: Rescuing Our Children from Failed Educational Theories” by E.D. Hirsch, Jr.
- “A Fresh Look at Phonics” by Wiley Blevins
CHAPTER 4: EVALUATING & CHOOSING HIGH-QUALITY INSTRUCTIONAL MATERIALS

High-Quality Instructional Materials on the Market

Excitingly, there are now multiple sets of high-quality early literacy instructional materials available on the market, either from traditional publishers or newer, open educational resource providers. We originally identified these materials using several sources of information:

- Edreports.org, the “Consumer Reports” for instructional materials. While the website has only reviewed select early literacy materials to date, they are working on fleshing out a comprehensive set of ELA and math materials. Each set of curricula is reviewed for alignment to high standards (similar to the Tennessee ELA and math standards) for each grade level, and a comprehensive report details the strengths and challenges of each. These reviews are conducted by carefully trained educators, a number of whom are from Tennessee.
- The Louisiana Department of Education has also conducted in-depth reviews of many sets of instructional materials.
- Word of mouth. TNTP has supported materials adoption and implementation in many districts across the country and has seen different sets of materials in action. We suggest networking with the original LIFT districts or nearby school districts to better understand what materials are currently used.
- Some districts in other parts of the country have reviewed materials on their own or in a consortium, using the Instructional Materials Evaluation Tool (IMET) to support analysis. While we believe that using pre-existing reviews is a better use of districts’ time, this is an option.

It is worth noting that none of the materials LIFT districts ultimately selected were available in their current form the last time that the Tennessee Department of Education reviewed ELA materials and, therefore, were not on the state-approved list. LIFT districts used these materials as “supplemental” materials during pilot phases.

The chart below indicates the materials that have been piloted by districts in the LIFT network as of July 2018:

<table>
<thead>
<tr>
<th>Instructional Materials</th>
<th>Districts Using</th>
</tr>
</thead>
<tbody>
<tr>
<td>EL ELA</td>
<td>Dyersburg (Grades 3-5)*</td>
</tr>
<tr>
<td></td>
<td>Lenoir City (Grades 2-3)</td>
</tr>
<tr>
<td></td>
<td>Shelby County (Grades K-5)</td>
</tr>
<tr>
<td></td>
<td>Jackson Madison (Grades 3-5)</td>
</tr>
<tr>
<td>Core Knowledge Language Arts</td>
<td>Sullivan County (Grades K-3)</td>
</tr>
<tr>
<td></td>
<td>Loudon County (Grades PK-2)</td>
</tr>
<tr>
<td></td>
<td>Putnam County (Grades PK-4)</td>
</tr>
<tr>
<td></td>
<td>Trousdale County (Grades K-5)</td>
</tr>
<tr>
<td></td>
<td>Jackson Madison (Grades K-2)</td>
</tr>
<tr>
<td></td>
<td>Fayette County (Grades K-3)</td>
</tr>
<tr>
<td></td>
<td>Metro Nashville Public Schools (Grades K-4)</td>
</tr>
<tr>
<td></td>
<td>Lincoln County (Grades K-2)</td>
</tr>
<tr>
<td></td>
<td>Marshall County (Grades K-1)</td>
</tr>
<tr>
<td></td>
<td>Overton County (Grades K-3)</td>
</tr>
<tr>
<td>Wit &amp; Wisdom</td>
<td>Lauderdale County (Grades K-3)</td>
</tr>
</tbody>
</table>

*Dyersburg also piloted the Read Aloud project in grades K-2. The Read Aloud project offers high quality lessons that meet the bar of the instructional shifts and standards. Dyersburg has chosen to use the Read Aloud project as a short-term solution prior to the next materials adoption in Tennessee. We have chosen not to include information about Read Aloud project, as it is not a complete instructional program. For more information on the Read Aloud project, visit or reach out to Student Achievement Partners.
Managing Change through Selecting High-Quality Instructional Materials

Besides consulting outside reviews of instructional materials, LIFT districts engaged in a comprehensive internal review process, including reviews by administrators, building leaders, teachers, and, occasionally, community members.

The review processes varied by district but focused on selecting materials that aligned with the district vision for excellent instruction (as grounded in the Tennessee standards). To conduct reviews, districts relied on nationally-vetted evaluation tools, such as Student Achievement Partners’ Instructional Materials Evaluation Tool (IMET). Review teams were carefully selected and trained, and districts facilitated the review process to ensure reviewers were supported in applying the review tools.

District processes also involved multiple stakeholder groups. We strongly suggest conducting at least two sets of focus groups before making any decisions to pilot. The purpose of these focus groups is both to ensure district decision makers have input from each group and to build buy in and trust with the groups who will be closest to the change once new materials are introduced.

1. **Teacher focus groups.** By putting sample sets of instructional materials in front of educators before committing to any investment or pilot program, districts can gain significant buy-in and support from teachers in these efforts, as well as insight into the kinds of support that might be necessary to implement materials. LIFT districts that did this successfully included all teachers who might pilot the materials in some sort of focus group or exploratory meeting, often looking at two or three different sets of materials. See “Resources” below for sample decks and materials.

2. **Leader focus groups.** Just as teachers’ input is invaluable in gaining support for and insight into resources needed for implementation of materials, school leaders and coaches/APs/etc. who might support the work should also have input. We suggest gathering school leaders and coaches from schools where pilot programs might occur to better understand their reactions to materials. This can occur alongside teacher focus groups, although we recommend that at least some teacher focus groups occur without school leaders present.

3. **Community focus groups.** Families and community members are true partners in our work to improve literacy for students, but too often the voices of these stakeholders are overlooked. By engaging families and community members in the materials selection process districts can gather input about what the community currently values about literacy instruction and what improvements families would like to see. We recommend carefully structuring community and family focus groups so that the questions and format leverage the expertise of the attendees (which will vary from the expertise teachers or leaders bring to the table). These conversations are also valuable opportunities to invest families and community members in the vision for excellent literacy instruction so that support extends beyond the formal school day.

4. **Student focus groups.** As the intended beneficiaries of improved instructional materials, we shouldn’t overlook the perspective of students. Consider ways to connect with students to hear about their current experiences with reading instruction and ask what is going well and what could be improved.
District Vignette: Instructional Materials Pilots in Loudon County

After a review of K-2 instructional practices in the fall of 2016, Loudon County began to look closely at K-2 instructional materials. District leaders initiated a process to engage both teachers and school-level administration, convening focus groups to evaluate materials and discuss implications, before deciding to pilot both Wit & Wisdom and Core Knowledge Language Arts (CKLA) in 12 K-2 classrooms. Teachers in these classrooms spent approximately six weeks teaching from each set of materials, covering two units or topical domains from each. The instructional review revealed that many of the approved, adopted resources being used in classrooms were not the high quality, appropriately complex texts students should be engaged with on a daily basis.

During the diagnostic visits, 27% of classrooms had lessons centered on high-quality texts. During the pilot of instructional materials, classrooms using high-quality texts in instruction increased to 83%. Even in these limited pilots, teachers saw an increase in student interest, expanded vocabulary, and improved written expression. At the end of the spring semester, teachers, school leaders, and district staff came together to debrief their learnings. There was strong agreement that the materials, along with other measures, such as focused professional development, job-embedded coaching and reflective collaboration, significantly strengthened instruction and supported teachers in their practice. With significant input from teachers and school-based staff, Loudon County evaluated the benefits and challenges of both sets of materials. CKLA was chosen as the most flexible option to provide access to high-quality materials while preserving the opportunity for teacher choice.

This fall, Loudon County is rolling out CKLA to all K-2 teachers with strong support and is already beginning to see positive results across K-2 classrooms.

Budget and Cost Considerations

Budget and availability of resources is undeniably a factor in choosing a pilot model. While Open Education Resources (OER) are a promising development in expanding the availability of resources for educators, LIFT districts would be quick to debunk the myth that any OER materials are “free.” Even when access to materials is free, implementing the resources may require purchasing texts, printing teacher’s editions, and printing or purchasing student materials. For more detail about the costs of the materials listed above see the “Curriculum Overview Document.”

LIFT districts managed costs in several ways depending on local context. Many districts funded the pilot through local sources, tapping into resources dedicated to early literacy and resources for teachers. To leverage local funds, some districts audited the landscape of resources targeting ELA instruction to look for any duplication of effort or unneeded expenditures, involving teachers in the conversation about which resources were most effective for students. Other districts sought community support to fund the pilot, including conversations with local foundations and supporters of public education.
Resources

- Student Achievement Partners’ Instructional Materials Evaluation Tool (IMET)
- Louisiana Department of Education Instructional Materials Reviews
- Edreports.org
- Curriculum Overview Document
- Overview Core Knowledge Language Arts
- Overview EL Curriculum
- EL Trade Book Cost Estimate
- Overview Wit & Wisdom
- Core Knowledge Curriculum Website
- EL Curriculum Website
- Wit & Wisdom Curriculum Website

Organizational contact people for materials we’ve piloted:

- Core Knowledge Foundation: Linda Bevilacqua: lindab@coreknowledge.org
- EL Education: Amy Bailey: abaily@eleducation.org
- Great Minds/Wit & Wisdom: Sarah Woodard: sarah.woodard@greatminds.org
Managing Change by Piloting Instructional Materials

LIFT districts have had success in starting small and piloting new instructional materials in a subset of classrooms before rolling out new materials to the entire district. Pilots have allowed for stronger change management and building a consensus on the right approach to improving literacy instruction before committing significant district resources and effort. Put another way, pilot models support districts in “going slow to go fast”—while changes in student achievement are paramount to all districts, we’ve learned that slower rollouts can often support sustainable change in the long-run.

Leading a Pilot

One common attribute of the pilots in the LIFT Network is the level of prioritization placed on the pilots in a landscape of many initiatives and changes. This focus stems from the common, specific problem of practice in the LIFT Network on early literacy, and the work of the LIFT districts in narrowing their focus to get at the root cause of the instructional challenges they were facing. In other words, the LIFT districts were deeply invested in the strategy of the materials pilot as the best bet to move forward, and this investment translated into sustained attention, resources, and effort around the pilots.

Much of the work of the pilot was owned by each district’s “strategy lead.” The strategy lead was chosen by the district superintendent to act as the point person for pilot implementation. The strategy lead should be in a position of responsibility for improving early literacy and should serve as the point person on work such as organizing instructional reviews, monitoring progress, supporting pilots, etc. This person might be the district supervisor for K-5 or for ELA/literacy, a lead instructional coach, or a school-based leader, depending on the pilot model and district staff structure. Superintendents have reflected that having a clear ownership plan and one point person is key to pilot success.
Districts have varied their pilot models based on their unique contexts. We are highlighting three of these models that have proven to be successful, although the specific choice will vary depending on your district context.

<table>
<thead>
<tr>
<th>Model</th>
<th>Pros</th>
<th>Cons</th>
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</table>
| **Whole-school pilots.** One to three schools are picked to implement the new instructional materials with all teachers in certain grade levels (usually K-2). These schools generally represent a subset of all schools (e.g., three of 12 elementary schools or two of six primary schools). | - School leaders support efforts across all grade levels, changing schedules, adjusting PLC/teacher worktimes, and investing in learning materials.  
- School leaders are able to be closely involved in leading the work of implementation.  
- Teachers have partners to support their implementation work.  
- In districts that try two sets of instructional materials, schools can see the impact of those materials on scheduling, teacher effort, etc. | - Pilot schools are generally the most invested in change efforts, meaning that full rollout the following year might include less-invested teachers and leaders.  
- Both higher- and lower-performing teachers, as well as invested and less invested teachers, are asked to use materials, potentially leading to weaker implementation. |
| **Scattered teacher pilots** A handful of high-performing (and interested) teachers across all schools are asked to pilot materials. | - Only strong teachers that are able to give high-quality feedback are asked to pilot materials.  
- Teachers only join the pilot program if they believe in the change effort.  
- When larger rollouts of the materials begin after the pilot phase, there is already a teacher or two in every building who has experience with the materials.  
- Non-pilot teachers begin to hear about and see materials through word-of-mouth within their schools. | - There is no dedicated “cohort” of pilot teachers with principals or instructional leaders dedicated to supporting them.  
- Teachers do not always have partners in their schools teaching the same materials on the same grade level. |
| **Whole-district pilots.** District and school leaders (and teachers) elected to pilot across all K-2 classrooms. | - Because everyone is involved in pilots, districts can alter schedules or redeploy resources as needed to support the work.  
- No long-term rollout necessary if materials pilots are successful. | - There is a possibility that early implementation may go poorly and jeopardize long-term efforts.  
- In larger districts, efforts may be diluted and not end up having strong support or implementation from all participants. |
In particular, districts with strong pilot models have found:

- **Teachers must be invested.** Teachers become the biggest advocates for the work, convincing other teachers, other school leaders, and sometimes parents and school board members that this is the right place to focus and the right way to spend district resources.

- **Create a culture of error.** Leaders can create “safe spaces” where it is not only OK to fail—or at least not get everything right the first time—but encouraged. Successful districts said explicitly to teachers, “This is a pilot, and we know it’s not going to be perfect on Day 1. Try it, tell us how it’s going, and we’ll adjust course if need be.” Many districts even suggested that if materials implementation was a disaster, they’d reverse course and go back to earlier models or try something else entirely.

- **Pilot teacher input is critical before rolling out materials to larger numbers of teachers.** Teachers and leaders, together, have fine-tuned implementation efforts before rolling out to larger numbers of teachers. What does onboarding need to look like for teachers new to instructional materials? What supports do they need in their first few weeks in the classroom? What should the scope of professional learning look like after those first few weeks? What are the strong points of the instructional materials, and what might need to be supplemented or augmented?

- **Thinking through logistics is critical.** The logistics and systems implications of a materials pilot should be cared for early and often. For example, districts reported examining budget implications for multiple years before making purchasing decisions (rather than only considering purchasing as a one-time event). Principals and districts worked together to create distribution plans for new materials and involved pilot teachers in developing classroom systems to care for and maintain the new resources so that they will be a lasting resource for the district.

- **Gather teacher input on materials selection.** In some districts, pilots have also allowed teachers to try two sets of materials when there wasn’t common agreement about which ones to pilot. Loudon County and Fayette County both piloted Wit and Wisdom and Core Knowledge Language Arts for several weeks, eventually pulling teachers together to decide on which materials to use longer-term.

- **Consider the messaging of your pilot before the pilot begins.** Some districts have warned about using the language of “materials pilot” broadly, as they have received feedback that “pilot” efforts are sometimes seen as one-year initiatives that will not continue. To ensure that teachers understand that a year-one pilot is the beginning of a long-term initiative, these districts have recommended using terminology such as “early implementors” in lieu of “pilot” teachers or schools.

Additionally, when choosing materials, LIFT districts found that starting with K-2 was critical to successful implementation. By starting material implementation with early elementary students, students are then set up for success to experience more rigorous materials in higher grade levels. Some districts may choose to pilot materials with upper elementary grade levels in certain classrooms with high performing teachers; however, for full rollouts, we recommend piloting in early elementary grades.
At the beginning of the 2016-2017 school year, teachers and leaders in Sullivan County decided they wanted to try Core Knowledge Language Arts as potential instructional materials for their elementary schools. They selected three of 12 elementary schools to pilot both strands of the materials (the “Skills” strand, focusing on foundational skills, and the “Knowledge” strand, focusing on read-alouds and discussion of complex, knowledge-building text).

Critical to this effort were the teachers in each of these three pilot schools. Brought together in the weeks leading up to the start of school, district leaders framed these teachers as the “Game Changers” in the district. They were given significant autonomy and tasked with leading the work and truly changing the game for students. They were asked to use the new materials and provide careful and critical feedback on them throughout the year. These teachers had the right to veto the work long-term—if they tried the materials for the year and didn’t think they were right for students, they had the final say.

The game changers met once a month throughout the school year, coming together for half-day sessions to discuss implementation, challenges, and successes. The first few sessions focused on logistics and early concerns, including the availability of materials and the layout of the literacy block and scheduling. These conversations evolved to focus on the theory and approach of the materials including concerns about the slow pace of the Skills strand in Kindergarten and the lack of fluency practice in second grade.

The most important part of the work was that these concerns were acted upon. District leaders made these teachers the center of the work, taking their concerns and working to fix them quickly, and praising the hard work that they were doing early and frequently.

These teachers bonded as a group and took on the mantle of the work. In May, Sullivan County decided to adopt both strands of the CKLA materials for all of their elementary schools, and the 20 “Game Changers” will serve as leaders and mentors as almost 200 teachers take on the materials this coming school year.

Onboarding & Orienting Staff Members to Pilots

Once a pilot model is chosen, district leaders should be careful to support teachers and leaders as they learn about and try new resources. We believe three steps are critical here:

• **Strong “onboarding” is essential.** Teachers benefited from having a brief introduction to materials at the end of the semester before they started using them (i.e., in May before summer break or in December before winter break). Teachers then generally needed a more comprehensive introduction as they began teaching. See Chapter 6 for additional details and sample sessions.

  ° Note: While teachers needed an introduction to the materials, we didn’t find it as useful to support teachers in learning the theory and research behind the materials in the first few weeks of school, for two reasons. First, teachers were concerned with other priorities during the first few weeks of school or the semester. And second, teachers better understood the theory and research once they had a handle on how the materials were laid out and how they were used, being able to connect components of the materials to strong theory.

  ° Leaders benefit from onboarding before teachers, so that they can reinforce the rationale and roll out plan for teachers. Leaders often benefit from visiting other districts to see implementation in action and having time to discuss implications of the materials pilot on school systems (such as scheduling, observations, and other routines).

• **Teachers and leaders need to be supported throughout implementation.** Teachers and leaders need structures in place to discuss implementation and common challenges, as well as celebrate early wins. In one of our districts, pilot teachers came together for a half-release day each month under the supervision of pilot principals and Curriculum & Instruction team staff. During this time, they discussed
logistical aspects of implementation, addressed common challenges that required district-level changes (such as scheduling or need for additional resources), began internalizing theory and research behind the materials (see next chapter for more information), and discussed where their learning and implementation efforts needed to go next. This group then became mentors for new teachers when pilots expanded in the second year of implementation.

- **Strong feedback loops are necessary to support pilot teachers and leaders and ensure that their voices are heard.** LIFT districts engaged in several methods of gathering feedback from teachers and leaders:
  - Monthly classroom walkthroughs with coaches, leaders, and TNTP staff
  - Annual or semester surveys of teachers and leaders (see Chapter 7 for details)
  - Monthly half-release days or planning sessions with teachers
  - Online communities, such as Google Groups, where teachers can post materials, highlights, videos, etc.
  - Focus groups of teachers and leaders to share successes and areas for growth, along with feedback on the implementation process

Chapters 6 and 7 will explore these elements with greater depth.

## Managing Change by Building Investment

In the spirit of “go slow to go fast,” LIFT districts have reflected that piloting new materials provided a stronger platform for building investment in the need for change and the strategy to achieve it.

Within pilot programs, district leaders made it clear teachers were not expected to master new instructional materials in the first few weeks or months; instead, they allowed for “messiness” and gave teachers time to really understand the materials before being held accountable for results. This space for trial and error was accompanied by meaningful, intentional support. The slower roll out built a cadre of teachers who were invested in the materials and had built their knowledge and skill to use them well, an asset that LIFT districts lean on when scaling up the materials to other teachers. As non-pilot teachers heard about and saw the materials in action, they became excited about trying them themselves. Pilot teacher voice was also key in this effort—teachers heard from their peers that these materials supported them to teach great lessons for their kids.

The LIFT districts also found that celebrating early wins and recognizing the incredible work of teachers was pivotal in making this work a success. In many districts, teachers engaged in pilot programs were celebrated as being on the forefront of the work or as “game changers” (see the Sullivan County example). District administrators framed the introduction of new materials positively by telling teachers that these materials would allow them to spend extra time planning to meet the needs of their students rather than finding instructional materials. District leaders also celebrated examples of improved instruction, shared data with teachers, highlighted exciting classroom visits, and shared funny and touching anecdotes that demonstrated student growth.
CHAPTER 6: LONG-TERM LEADER & TEACHER KNOWLEDGE- AND SKILL-BUILDING

The Importance of Building Knowledge and Skill Long-Term

While instructional materials provide a key lever to improving instruction, they are not a panacea. Teachers need to understand the theory and details that underpin strong instructional materials, so that they can implement them with integrity and become “critical consumers” of the materials, adapting them for their students and identifying where there may be gaps in what is provided.

Likewise, leaders—including school leaders, coaches, and district or network leaders—need deep expertise to support teachers in this work, both to provide structures and supports, such as PLCs and resources, and to identify areas of success and challenge. As mentioned in Chapter 2, both school and district leaders need to plan with an eye for how different academic levers intersect and interact. For example, leaders must consider how changes in materials relate to the local assessment, to current intervention programs, to policies (such as homework and/or grading practices), and to professional learning plans. While initial knowledge building is critical to launching a pilot, we know that knowledge continues to build as teachers and leaders get deeper into implementation; attending to ongoing development and deepening of knowledge is critical to sustainability and scale.

Building Knowledge for Leaders

Over the past 18 months, LIFT has built knowledge among leaders in several key ways:

- Semi-annual convenings of the LIFT network, in which we discuss the overall arc of the work, reflect on network-level data, and build a common understanding of high-quality literacy practices.
- Semester-long PLCs (virtual or in-person), focused on topics needed at the time. Previous topics have included implementation of specific sets of instructional materials, going deep on questions and tasks, and student work analyses.
- Book studies, including Why Knowledge Matters and A Fresh Look at Phonics.
- Strategic visits to districts by other superintendents or staff to observe instruction and learn best practices.
Building Knowledge for Teachers

LIFT districts have also focused on building knowledge for teachers. While we have found that some knowledge of the standards and shifts is important, we’ve focused most of our work on building teacher knowledge of materials with the idea that teachers will deepen their understanding of the standards through closer analysis of strongly aligned materials. In our work with LIFT districts, we have found that there are three phases of professional learning that effectively build teacher capacity to implement high-quality instructional materials, outlined in detail in the *Phases of Curriculum-Focused Teacher Professional Learning*:

<table>
<thead>
<tr>
<th>Phase 1</th>
<th>If we support teachers to ...</th>
<th>Then teachers will ...</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Establish regular routines and engage in consistent protocols for unit and lesson preparation.</td>
<td>• Deliver units and lessons with fidelity – as written and intended by the curriculum.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Build trust and confidence in the unit and lesson materials.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Begin to identify what works and what doesn’t for them and their students.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Phase 2</th>
<th>If we support teachers to ...</th>
<th>Then teachers will ...</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Deepen and refine their unit and lesson preparation with a focus on the desired results for learners.</td>
<td>• Deliver units and lessons with integrity – maintaining the intent of the curriculum but making strategic adjustments and decisions to improve the impact on students.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Phase 3</th>
<th>If we support teachers to ...</th>
<th>Then teachers will ...</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Establish regular routines and engage in consistent protocols for reflection on student learning; and</td>
<td>• Empower students to own their learning; and then students will...</td>
</tr>
<tr>
<td></td>
<td>• Develop a toolkit of cognitive routines to support student ownership.</td>
<td>• Achieve the desired results for learners intended by the curriculum.</td>
</tr>
</tbody>
</table>
In the pilot year, most teachers will need development in Phases 1 and 2, focusing their attention on planning for the delivery of lessons using instructional materials and then likely moving to making strategic adjustments to materials to impact student learning. It is important to note that the phases of professional learning may vary from teacher to teacher and school to school, as teachers will learn and become comfortable with implementation of materials at different rates.

In the early phases of implementation, learning will focus primary in Phase 1, helping teachers orient to the content and structure of the materials. In moving to Phase 2, LIFT has focused much professional learning around efforts to improve questions and tasks (Core Action 2 on the IPG), and especially unit-level preparation. Across the first year of implementation of read-aloud materials, we found that teachers were not systematically thinking about the key understandings or essential questions in a topically connected unit, and were instead focusing more on individual textual elements, such as vocabulary. Much of our knowledge-building this year has been around giving teachers tools, such as the unit preparation protocols, that asked them to consider the larger takeaways that students should have as they complete a unit, and whether end-of-unit tasks allowed students to demonstrate their knowledge of these takeaways.

The majority of LIFT districts will begin to take on Phase 3 learning during the 2018-2019 school year, as teachers are now ready to shift their focus to student ownership of learning. It is important to call out that it often takes teachers one to two years of implementation before they are ready to tackle Phase 3 learning, and that this learning curve is normal as teachers learn how to best implement materials in their classrooms with their students.

We’ve also supported teachers in learning more about foundational skills, although much of that has been through the use of high-quality materials in the 2017-18 school year. In particular, a major area of need was in the use of decodable readers aligned to the content that was taught each day in foundational skills lessons; strong materials have shown the importance of that work for students.

District Vignette: Building Leader Content Knowledge in Trousdale County

One of the most successful elements of the K-2 CKLA Knowledge Strand materials pilot in Trousdale County was the constant connection school leaders made between the materials and the ELA instructional shifts. The goal of the materials adoption was to improve the quality of K-2 reading comprehension instruction and align instruction to the shifts and standards. To make this happen, teachers need to see how the shifts and standards live within the materials. Last year, Trousdale County focused on having leaders support two major types of inquiry for teachers.

The first was grade-level PLCs. During these weekly meetings, instructional leaders guided teachers to discuss key questions designed to help them internalize the unit and lesson materials and get at a deeper, richer discussion of the text. For example, leaders would guide teachers to determine essential ideas and understandings of the unit, design end-of-unit tasks, analyze texts for connections to those big ideas, and also select (and sometimes revise or create) a scaffold of questions that led students toward building key understandings of the text and topics.

Leaders also held frequent coaching conversations with teachers, always centered on a key question: “Tell me what your goal was for this lesson.” Leaders would then discuss how the elements of the lesson led up to that key understanding, again talking about texts, discussion questions, end-of-unit tasks, and other activities.

To effectively lead these discussions, district leaders needed a strong conceptual understanding of the Tennessee ELA standards and the shifts they require, as well as a comprehensive knowledge of the instructional materials. Leaders in the district built their own content knowledge in several ways, including monthly classroom walkthroughs and debriefs with TNTP staff, consistent attendance at LIFT PLCs, and digging into the materials on their own to do question and task analysis.
# Sample Professional Development Sessions and Resources

<table>
<thead>
<tr>
<th>Phase of Learning</th>
<th>Focus Area</th>
<th>Description &amp; Rationale</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Phase 1</strong></td>
<td>Introduction to New Materials</td>
<td>Successful introduction to new materials should include:</td>
<td>• CKLA K-2 Listening &amp; Learning Strand</td>
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<td></td>
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<td>• Rationale for new materials</td>
<td>• CKLA Skills Strand</td>
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<td></td>
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<td>• Understanding of resources design</td>
<td>• CKLA Grades 3-4</td>
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<td>• Tactical information, including materials organization, access to paper copies vs.</td>
<td>• EL Modules</td>
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<td></td>
<td></td>
<td>digital copies, etc.</td>
<td>• Wit &amp; Wisdom</td>
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<td>• Building a vision for implementation, such as seeing a model lesson and the start of</td>
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<td></td>
<td></td>
<td>unit planning</td>
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<tr>
<td><strong>Phase 1</strong></td>
<td>Unit Prep</td>
<td>Implementing a unit preparation protocol allows teachers to focus on the knowledge</td>
<td>• CKLA Unit Preparation Protocol</td>
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<td>that students should develop over the course of an entire unit and understand the arc</td>
<td>• CKLA Unit Preparation Training</td>
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<td></td>
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<td>of learning that students will experience.</td>
<td>• EL Module Preparation Protocol</td>
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<td></td>
<td>• W&amp;W Module Preparation Protocol</td>
</tr>
<tr>
<td><strong>Phase 1 &amp; 2</strong></td>
<td>Lesson Prep</td>
<td>Lesson preparation protocols give teachers a structured way to internalize and customize</td>
<td>• W&amp;W Book Preparation Protocol</td>
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<td>a lesson prior to implementing it with their students.</td>
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<tr>
<td><strong>Phase 1</strong></td>
<td>Foundational Skills Introduction</td>
<td>Instruction on Foundational Skills builds teacher understanding of student progression</td>
<td>• Sample Foundational Skills Training</td>
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<td></td>
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<td>of learning. It also builds understanding of excellent instruction as defined by the</td>
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<tr>
<td><strong>Phase 2</strong></td>
<td>Tasks &amp; Writing</td>
<td>Analyzing tasks and writing helps teachers better understand the tasks in the materials,</td>
<td>• Examining Tasks Session Plan</td>
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<td></td>
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<td>and how they represent the standards and shifts. It also helps to see the alignment</td>
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<td>between end of unit tasks/assessments, daily tasks, and question sequences. If needed,</td>
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<td>it also gives teachers the opportunity to make adjustments to tasks.</td>
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<tr>
<td><strong>Phase 2</strong></td>
<td>Student Work Analysis</td>
<td>By analyzing student work, teachers are able to diagnose where student misunderstanding</td>
<td>• Student Work Analysis Protocol</td>
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<td></td>
<td></td>
<td>breaks down and create or modify plans for re-teaching and reinforcing content.</td>
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</tbody>
</table>
CHAPTER 7: PROGRESS MONITORING
Measuring the Impact of Our Work

A critical component of our work is measuring if our work leads to a change, and if the change is an improvement.

In order to answer these questions, the LIFT network seeks to identify the intended outcomes and means of measurement before introducing a change, and to then report on progress transparently. The LIFT Network considers multiple sources of information when measuring the impact of our work. We consider anecdotal feedback on a daily and weekly basis, talking with teachers, watching instruction, and listening to students. We also look at the impact of our work in several more qualitative and formal ways:

<table>
<thead>
<tr>
<th>Type of Data</th>
<th>Why We Measure It</th>
<th>How We Measure It</th>
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</thead>
<tbody>
<tr>
<td>Classroom Observations</td>
<td>At the heart of our theory of action is that changes in classroom practice will result in changes in student learning. We measure teacher practice through observations because we believe it is a leading indicator for student learning, providing evidence of change on a short-term basis.</td>
<td>TNTP staff members visit classrooms in each LIFT district roughly once a month and observe instruction using the Instructional Practice Guide. Many districts also conduct their own walkthroughs with district staff or principals on a regular basis, also using the IPG.</td>
</tr>
<tr>
<td>Student Work Analysis</td>
<td>As with classroom observations, we believe student work, including the quality of tasks assigned and student performance on assignments, is a reliable leading indicator of student achievement.</td>
<td>TNTP staff gather student work samples once a semester from across the LIFT network and evaluate them based on the EQuIP student work protocol (see &quot;Resources&quot;).</td>
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<tr>
<td>Teacher and Leader Knowledge of Shifts and Standards</td>
<td>We believe a key component of this work is the knowledge of the shifts and standards held by district leaders (superintendents, CAOs, literacy leads, etc. and teachers).</td>
<td>We measure this through a knowledge survey of our leaders and teachers twice a year (see “Resources”).</td>
</tr>
<tr>
<td>Teacher and Leader Sentiment</td>
<td>While investment is a key component of change management, we also believe that it is critical to making a difference in student outcomes.</td>
<td>We measure this through a sentiment survey of our leaders and teachers twice a year (see “Resources”).</td>
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<tr>
<td>Parent Perceptions</td>
<td>Families are our partners in encouraging students to become strong readers, writers and thinkers. By understanding parents’ experience with our literacy program, we can better engage parents in supporting students.</td>
<td>We piloted a family survey in May 2018 in two LIFT districts (see &quot;Resources&quot;).</td>
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<tr>
<td>RTI Placement</td>
<td>With stronger Tier I instruction, we believe that fewer students should be placed in Tier II and Tier III instruction long-term.</td>
<td>We are working with LIFT districts to design a tool that monitors placement and movement of students between Tiers.</td>
</tr>
<tr>
<td>Student Outcome Measures</td>
<td>Ultimately, we hope to improve student outcomes in ELA.</td>
<td>Research demonstrates that instructional interventions (such as changes in instructional materials) can take multiple years to influence student achievement data. While this is a lagging indicator, especially for K-2 students, we plan to investigate state test scores over time (in 2nd and 3rd grade). Starting in 2018, we’ll also have year-over-year Kindergarten portfolio data and second grade assessment data.</td>
</tr>
</tbody>
</table>
Sharing Progress & Adjusting Course

Twice a year, we step back and look at all of this data to take stock of where we are as a network and where we plan to go next (see the May 2017 data stepback deck in “Resources”, below).

We also step back at the district level on a similar timeline; however, reflection and adjustment is not limited to these bi-annual step backs. TNTP staff members visit each LIFT district roughly once a month, and each visit focuses on a problem of practice to investigate through classroom observations and other sources of data (including teacher conversation and leader insights). These monthly visits use the PDSA cycle to guide thinking and problem solving.

The LIFT network also shares progress through annual reports, such as this update from September 2017.

Resources

- Instructional Practice Guide
- Teacher and Leader Survey (Fall 2017)
- EQuIP Student Work Analysis Protocol
- Example Data Stepback: May 2017
- Parent Survey: May 2018 Pilot
CHAPTER 8: SCALING AND SUSTAINING CHANGE

Given the promising progress in the materials pilots, many LIFT districts decided to scale the work with new materials to more or all classrooms in their districts. The network articulated the next step of the work as seeking both depth and breadth in the work to improve early literacy instruction.

To achieve **depth**, the network identified a need to focus on **continued improvement** of knowledge-building (read-aloud) instruction in K-2 classrooms. In particular, we aimed to build teacher and leader knowledge of instructional materials, the Tennessee ELA standards, and high-quality early literacy instruction, with the goal of improving the quality of questions being asked of students and the tasks they are asked to complete, as well as ensuring that students take on the majority of the thinking in each lesson (see Chapter 6 for more details on ongoing teacher capacity building).

The network also sought to **expand the breadth of the work in several ways**:

- **First**, we expanded our pilots of knowledge-building ELA instructional materials to additional K-2 classrooms in each district; most districts will begin using the materials in all K-2 classrooms.

- **Second**, we began looking at the entire K-2 literacy block, including foundational skills, writing instruction, and time for a volume of reading by students.

- **Finally**, we expanded similar work to additional grade levels, as some districts piloted instructional materials in grades 3-5.

In scaling the instructional materials to more teachers and additional grades, the LIFT districts have leveraged many of the same lessons and strategies from the pilot to larger scale implementation. But, new lessons have emerged that speak to the nuance and unique challenges of going deeper with implementation.
After the second full year of work with the materials pilots and expansion the LIFT districts shared these four lessons:

1. **Resource-specific professional learning experiences should be strategically sequenced to best support teachers and leaders.** As demonstrated in Chapter 6, we’ve not only seen the value of resource-specific professional learning, but capacity building that attends to the specific needs of teachers as they engage with the larger trajectory of change management.

2. **We observed greater improvement in instructional practice when conditions for success were intentionally developed prior to implementation at scale.** Simply put, this is the advantage of piloting the materials. As described throughout the Guidebook, the pilot not only allowed teachers to strengthen their implementation, but districts and leaders to get smarter about leading the change. Districts often cite this opportunity to prime the conditions prior to implementation at scale as critical to the success and sustainability of their efforts. To be clear, piloting is not the only way to build conditions for success with strong materials; other paths could include capacity building and systems alignments prior to working with strong materials. However, the LIFT districts routinely mention that there is really no substitute for trying out the materials, and ideally, that trial is done in a manageable scale so that learning and adjustment can happen quickly.

3. **Ensuring all students become strong readers will require sustained attention and deliberate strategy along the “vertical spine.”** While the instructional improvement the LIFT districts have seen is exciting, we are far from the finish line of truly transforming results for students. Districts reflect that having a individuals with the skills, resources, and motivation to lead the change will be crucial for long-term success, and that these individuals need to exist in each layer of the system. LIFT districts are continuing to foster widespread ownership of the work and maintain an intentional focus, particularly in the landscape of many competing priorities.

4. **Creating and sustaining momentum requires focused and relentless district leadership.** While widespread ownership is key, LIFT districts also reflect that there is no substitute for relentless and focused leadership at the center of the work. Districts have seen the most progress when the central office team is united and clear in their charge, taking a positive stance to engaging all stakeholders while fulfilling their role of setting direction and clearing obstacles.
Removing Barriers and Creative Solutions

In addition to the high-level lessons shared above, LIFT districts have also shared more specific lessons learned about obstacles they’ve encouraged along the way:

- Some teachers involved in pilot programs were concerned about whether the teacher observation rubric would align with the vision for instruction in the pilot materials. Many LIFT districts pulled evaluators together to analyze sample lessons and lesson videos from the instructional materials through the lens of the evaluation rubric in order to ensure evaluators were aligned in their vision for instruction. Other districts created guidance on the alignment of teacher evaluation and instructional materials for teachers.

- In many districts, schools used standards-based report cards aligned with curriculum-at-a-glance documents that were different than piloted materials. Many districts are re-evaluating report card and grading policies to align with pilot materials.

- Different materials require different structures and amounts of time in dedicated literacy blocks; when piloting materials, not all districts had a literacy block that worked for those materials. Districts either created guidance about how to use the pilot materials in the existing literacy block or worked with schools to redesign the literacy schedule.

- Districts acknowledged that the pilot materials required more and different knowledge of teachers in order to implement them well. To provide more support and time for teacher collaboration some schools revised PLC expectations and schedules, ensuring that grade-level peers had dedicated time to dig into the materials together to prepare for and reflect on instruction. For example, Trousdale County offers periodic early release days in order to provide teachers with additional collaboration time. The district has also selected grade-level leads who help guide collaboration time, so it is used effectively.

- While the pilot materials provide many resources to teachers, many districts recognized that teachers were supplementing the materials with PowerPoints or supporting centers materials. Some districts, including Sullivan County, pulled teachers together to develop strong supplemental materials, supporting them in the process to better understand the materials and to produce resources that maintained the rigor of the content. This strategy was particularly important in districts that opted not to purchase some available supplements to the materials as a cost-saving strategy.

- Many districts positioned the materials pilot as one strategy in their overall vision and strategy for literacy, making sure to draw explicit connections between core instruction and intervention. Lauderdale County designed an innovative schedule for elementary students that supports flexible grouping for students to address foundational skills instruction and intervention while still ensuring all students access high-quality read aloud lessons on a daily basis.

Many districts approached these challenges head on, acknowledging that all components of an academic system might not align at first and working proactively to address them; however, nearly all LIFT district reflected that, in hindsight, additional attention to these connections and proactive planning could have improved implementation, and this is an area of focus moving forward. Please see Chapter 2 for additional support around change management and the academic levers.
What’s Next for LIFT

TNTP and SCORE will continue to provide strategic support for achieving both depth and breadth in our shared work to improve early literacy, with a specific focus on strategic change management to ensure sustainability.

As we enter the 2018-19 school year we will focus our work as a Network on three specific questions:

1. How do we continue to build capacity of school systems, leaders, and teachers to ensure students are doing the cognitive work of making and demonstrating meaning of quality texts (Core Actions 2 and 3)?

2. What are the necessary preconditions to successfully sustain progress in early literacy in LIFT districts? What will our long-term change management strategy look like?

3. Building on our vision of excellent literacy, how can we build teacher and system capacity to leverage strong instructional materials to support all students in reaching the standards?

These questions are designed to tackle the most pressing common challenges across the network. We will continue to share our learnings, lessons, and resources as we test new ideas and study their impact.

Resources

- Pilot Expansion Planning Document
- LIFT Homepage
- LIFT 2016-17 Annual Report

Contact Information

Questions? Comments? Suggestions for additional resources? Please visit us at www.lifteducationtn.com or contact us:

- Dr. Sharon Roberts, Chief Strategy Officer, SCORE sharon@tnscore.org
- Courtney Bell, Director of Educator Engagement, SCORE courtney@tnscore.org
- Regan Kelly, Partner, TNTP regan.kelly@tntp.org
- Anna Norris, Site Manager, TNTP anna.norris@tntp.org