Evaluation Design DRAFT

PARTICIPATORY ACTION RESEARCH/ EMPOWERMENT EVALUATION STUDY DESIGN
FOR
OAKLAND UNIFIED SCHOOL DISTRICT'S
COLLEGE AND CAREER READINESS FOR ALL
(MEASURE N) INITIATIVE

EMAIL: JOHN.WATKINS@OUSD.ORG

PURPOSE

The Oakland Unified School District (OUSD) Linked Learning Office of High School Improvement (LLOHSI) is proposing the following evaluation study of the district's College and Career Readiness For All Initiative, funded for ten years (2015-2025) through a local property tax approved by Oakland voters as Measure N. This evaluation will constitute a study to deepen the understanding, and thus the quality, of the implementation, outcomes, and impact of the College and Career Readiness For All Initiative. We intend to engage in both formative and summative evaluations, using a mixed methods approach combining qualitative and quantitative analyses.

The general purpose of the evaluation is to provide information, findings and analyses, and recommendations for supporting sustained school and student level academic improvement and acceleration through the implementation of linked learning college and career pathways. Using both formative and summative assessments of progress and outcomes will help us to facilitate an ongoing results-based inquiry process for the district, the results of which will be presented to OUSD administrative leadership as well as to the OUSD Board of Education, the Measure N Citizens' Commission, and other stakeholders, through periodic reflection and review convenings and reports. The study will also provide a comprehensive structure, process, and protocols for OUSD and key stakeholders to continue to conduct longitudinal research on the college and career pathway initiative.

The evaluation study will address the following research areas:

1. School and pathway functioning, quality, and improvement
2. Student and school-level academic performance
3. Academic rigor (student work)
4. Quality of teaching and instruction (teacher practice)
5. Quality of school leadership and systems supporting implementation
6. Family and community engagement and satisfaction
7. Aligned district systems that directly support school and pathway functioning, quality, and improvement (implementation), and support student and school academic performance (outcomes and impact).

BACKGROUND

An **Oakland Unified School District Parcel Tax, Measure N** ballot question was on the November 4, 2014 election ballot for voters in the Oakland Unified School District in Alameda County, California. It was **approved**.

Measure N authorized the district to impose for ten years an annual parcel tax of $120 per unit of property. Measure N earmarked the tax revenue for adding school programs designed to prepare students for colleges and real-world jobs and reduce dropout rates. A two-thirds supermajority vote was required for the approval of Measure N. The measure passed with 76.57% of voters voting yes.

The ballot question read:
To reduce the drop-out rate and provide Oakland high school students with real-world work and learning opportunities; prepare students for admission to the University of California and other four-year colleges; expand mentoring, tutoring, counseling, support services, and transition to job training programs; shall the Oakland Unified School District levy a $120 parcel tax for ten years, with low income and senior exemptions, no money for Sacramento, and all money benefiting Oakland students?

The stated Purpose of The College and Career Readiness for All - Measure N - fund:

The Oakland College & Career Readiness for All Fund is established to pay for the implementation of a comprehensive approach to high school education in Oakland that integrates challenging academics with career-based learning and real-world work experiences. This comprehensive approach creates small learning communities of career-oriented pathways, and offers intensive, individualized support to create the conditions for all students to graduate high school prepared to succeed in college and career.

The Measure N Goals:

- Decrease the high school drop out rate
- Increase the high school graduation rate
- Increase high school students' readiness to succeed in college and career
- Increase middle school students' successful transition to high school
- Reduce disparities in student achievement and student access to career pathways based on race, ethnicity, gender, socio-economic status, English Learner status, special needs and residency

The full text of Measure N:
https://drive.google.com/open?id=0B6zjinOBh0pCQXc3YjZlVmtCeEd5RGJIalpfclJSWlVXSk1r

Context: OUSD Pathway to Excellence Strategic Plan

In addition to the Measure N Goals, the OUSD Pathway to Excellence states these goals:

- Provide every student with access to a high-quality school
- Ensure each student is prepared for college, career and community success
- Staff every school with talented individuals committed to working in service of children

- Create a school district that holds itself and its partners accountable for superior outcomes
- Guarantees rigorous instruction in every classroom, every day

The full text of OUSD's Pathway to Excellence: http://www.ousd.org/pathwaytoexcellence

SCOPE OF THE EVALUATION STUDY

Audiences and Stakeholders
The immediate audiences and major stakeholders for this evaluation include:
- The Measure N Citizens' Commission;
- The OUSD Superintendent and executive leadership team;
- The Board of Education;
- The Linked Learning Office for High School Improvement;
- OUSD schools, staff, students, and families;
- Community-based partners; and,
- Oakland residents and taxpayers.

Purpose
The primary purpose of the evaluation is to facilitate a highly participatory, ongoing, results-based inquiry process for the Commission and OUSD district leadership, school site leaders, pathway leaders, teachers, students, and community partners to understand how to support and advance the development of linked learning college and career pathways as a strategy for accelerating student achievement throughout the district. The study will also provide a comprehensive structure and protocols for OUSD to continue to conduct longitudinal research on its linked learning college and career pathways initiative.

Evaluation Design and Focus
1) Participatory Action Research Approach:
   We propose a multi-tiered, "nested" Participatory Action Research Evaluation Design, with the additional emphasis that an Empowerment Evaluation provides, that would build on cycles of inquiry that teachers, school sites, and district offices are already doing or could easily adapt their work to.

   One possible definition of Action Research appropriate for our proposal is: "...an ongoing inquiry by people into their own work, through questioning, conscious actions, observation and reflection on those actions, data collection, analysis, and new questioning, designed specifically to improve that work toward some increased correspondence with the intended purpose of that work" (Watkins, 1995).

   Other useful framing from the additional below cited sources includes:
   a) From Piggot-Irvine, Rowe, & Ferkins (2015: 548): "[**Action Research**] is a collaborative transformative approach with joint focus on rigorous data collection, knowledge generation, reflection and distinctive action/change elements that pursue practical solutions. Put another way, we defined AR as having core elements of systemic research in a collaborative inquiry process that is associated with evidence-based decision-making both before and after change. We noted that [**Participatory AR**], with its stronger community change

orientation, would still fall within this AR definition given its equal emphasis on co-learning, emancipation, participation and organizational transformation (Greenwood, Whyte, and Harkavy 1993)."

b) **Participatory action research** (**PAR**) is an approach to research in communities that emphasizes participation and action. It seeks to understand the world by trying to change it, collaboratively and following reflection. PAR emphasizes collective inquiry and experimentation grounded in experience and social history. Within a PAR process, "communities of inquiry and action evolve and address questions and issues that are significant for those who participate as co-researchers".[1] PAR contrasts with many research methods, which emphasize disinterested researchers and reproducibility of findings.
PAR practitioners make a concerted effort to integrate three basic aspects of their work: participation (life in society and democracy), action (engagement with experience and history), and research (soundness in thought and the growth of knowledge).[2] "Action unites, organically, with research" and collective processes of self-investigation.[3] The way each component is actually understood and the relative emphasis it receives varies nonetheless from one PAR theory and practice to another. This means that PAR is not a monolithic body of ideas and methods but rather a pluralistic orientation to knowledge making and social change.[4][5][6]

c) **Empowerment evaluation** (EE) is an evaluation approach designed to help communities monitor and evaluate their own performance. It is used in comprehensive community initiatives as well as small-scale settings and is designed to help groups accomplish their goals. According to David Fetterman, "Empowerment evaluation is the use of evaluation concepts, techniques, and findings to foster improvement and self-determination".[1] An expanded definition is: **"Empowerment evaluation is an evaluation approach that aims to increase the likelihood that programs will achieve results by increasing the capacity of program stakeholders to plan, implement, and evaluate their own programs."**[2]

Rationale for a PAR/EE approach:
In their article, Conceptualizing indicator domains for evaluating action research, Piggot-Irvine, Rowe, & Ferkins (2015: 545) state, "Action research (AR) has become recognized as a valuable form of research and a model/program for change across multiple domains… (Adelman 1993; Elliott 2005; Kemmis and McTaggart 1988)."

They go on to quote Kemmis (2015: 545):
"'In my view, the principal justification for action research is that it makes a direct contribution to transformative action and to *changing history*' (Kemmis 2010: 425; original emphasis)."

We frame our proposal using these three different terms deliberately. Action research combines inquiry and action. Participatory methods emphasize collective inquiry and community change, enlarging the realm and focus of actions. Empowerment Evaluation adds an explicit focus on increasing the capacity of stakeholders within organizations to improve their own practice.

Working from these perspectives, we would value the potential "catalytic validity" (Lather, 1986) of participatory action research to transform those engaging in it, investing in long term capacity for ongoing reflection, learning, growth, and improvement. Because of that, we can nest the evaluation design in work already in process with many of our pathway teams and school sites; the nature of the work that we want teams to be doing together as communities of practice already has an inquiry lens and process to it, to a certain degree (e.g., the instructional design and revision cycle, the pathway cycle of continuous improvement, the school site CIG cycles of inquiry, etc.). Coaches, who are already supporting our sites to do this work, become action research facilitators, similar to what is already underway at Castlemont (See General Approach section below). In the Linked Learning Office, we have also taken beginning steps to reframe our collective work as inquiry, so there is some prepared ground there as well.

2) <u>Logic Model</u>:
   We also propose building out both the conceptual framework and timeline for this design from a Logic Model (program theory of action model) to guide the focus (and loci) and rigor or logic/ theory of action of the overall design. The Logic Model will also help to focus choices of appropriate assessment methods and protocols for each level of action research:
   a) Design Evaluation
      i) Initiative Inputs (e.g., Linked Learning Pathway Design Criteria, Measure N Purpose and Goals, other Community Partners' contributions; students; Pathway teams; site leadership; Measure N funds; other resources from other grant sources; external partner organization contributions)
   b) Implementation Evaluation
      i) Initiative Activities, including (again, see this diagram, or see below):
         (1) the work of the Pathway teacher team (cycle of instructional design & revision),
         (2) the development & quality of the Pathway itself (Pathway continuous improvement cycle),
         (3) the work of content area PLC's,
         (4) the work of the site leadership team(s) (Continuous Improvement Guide process, SPSA, school level cycle of inquiry),
         (5) the work of the LLOHSI and Teaching & Learning (cycles of inquiry focus on how we are supporting the site and Pathway implementation), and,
         (6) the overall district systems' capacity and alignment in support of implementation.
      ii) Initiative Outputs
         (1) Structural changes in pathways and school sites
         (2) Changes in the experience of major stakeholders
            (a) students
            (b) teachers
            (c) site leadership (principals, pathway leads, ILT, etc., and site personnel, e.g., counselors, etc.)
            (d) district personnel
            (e) industry & community partners

       c) Outcomes & Impacts, per Measure N Purpose and Goals

3) <u>Phases</u>:
Two (overlapping) phases of evaluation design:
    a) Formative Design & Implementation evaluation - to support effective implementation of high quality and fidelity to the Linked Learning approach
    b) Summative Outcomes evaluation - to assure that the implementation is leading to the intended outcomes, goals, and impact of the Measure N Fund
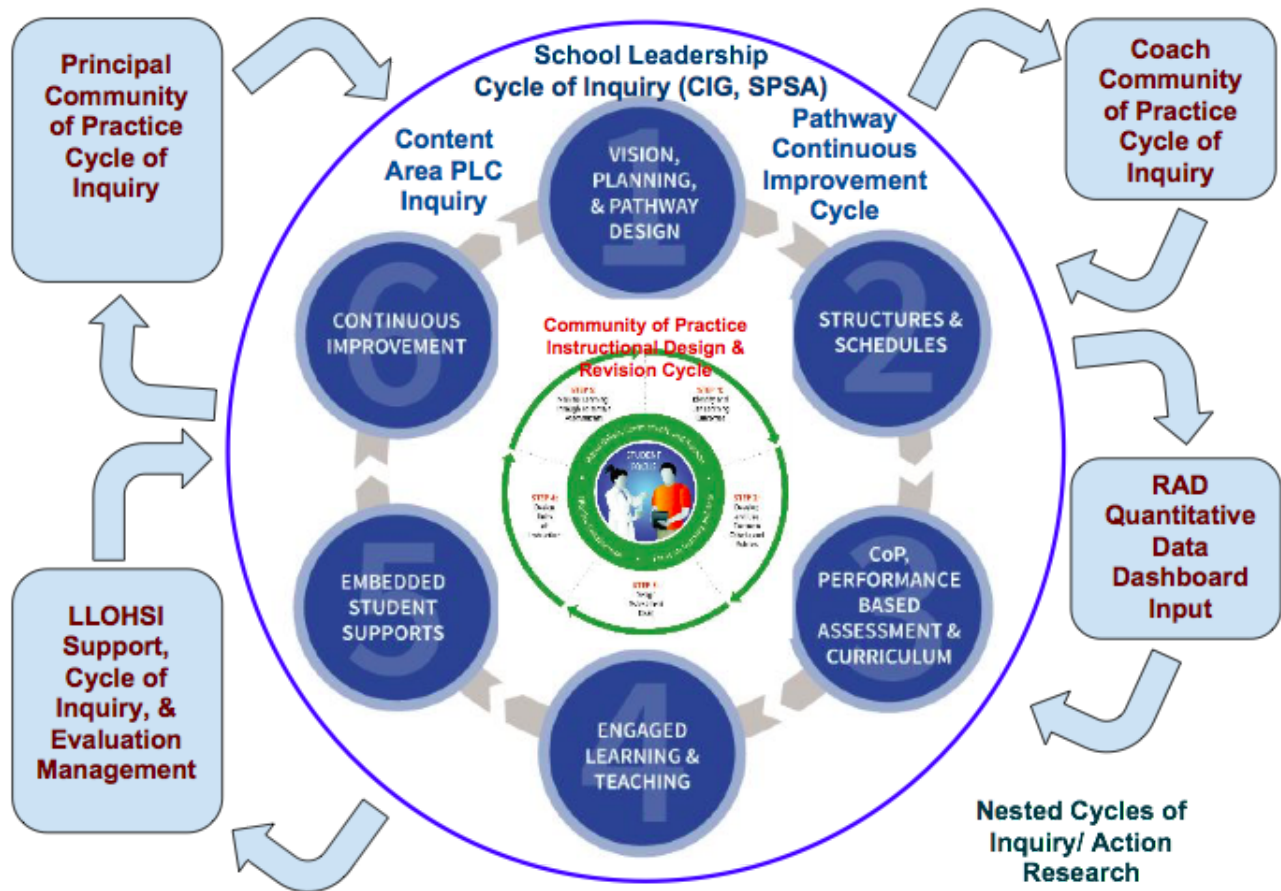Phases are:
    c) Phase I:
        i) LLOHSI oversees planning, enrollment, and convening of Stakeholders (Action Research teams) for facilitated sessions to frame overall Vision and Goals, questions and approach at each level of the evaluation.
In order of priority for development (during this phase, agreements are developed regarding action research processes, for which documentation and reflection are key.):
           (1) Linked Learning Office for High School Improvement in collaboration with Teaching and Learning. In the evaluation design, the LLOHSI primarily serves in an overarching coordination role, and continues to provide support, coaching, consulting, and technical assistance to sites.
           (2) Principals: harness the inquiry stance and focus of the CIG & SPSA; address development of site leadership capacity to lead complex change process as a cycle of inquiry; enroll whole site in vision for leadership – *not just pathways; but whole school with pathways are essential elements of school organization.*
           (3) Pathway Coaches *(and content area specialists)*: redefine coaching relationship to site leadership, role in transformation of pathway teams, department teams, and leadership capacity.
           (4) Site Leadership Teams – Including Pathway *and* Department Leads -- each has objectives defined in SPSA to work from. Will have specific objectives based on site context, including professional development goals, master scheduling processes as those appear in their SPSA.
           (5) Pathway CoPs and Content Area PLCs – each with strategic goals for professional development and student success, also based on SPSA and Pathway Continuous Improvement planning work, revisited each year, and connected to schoolwide goals.
           (6) Students, families, community and industry partners through engagement with Schoolwide Design Teams and community engagement forums.
        ii) The evaluation will focus on a mixed method study of implementation, with nested cycles of inquiry (participatory action research) at each "level:"
           (1) the Pathway teacher team (CoP) (cycle of instructional design & revision),
           (2) the Pathway itself (Pathway continuous improvement cycle),
           (3) content area PLC's,

        (4) students (student "civic engagement" or Graduate Capstone projects),

        (5) the site leadership team (school level cycle of inquiry),

        (6) key community partner groups,

        (7) the LLOHSI (cycle of inquiry focus on how we are supporting the site and Pathway implementation, and overall system capacity and alignment in support of implementation).

    iii) RAD will provide ongoing access for all levels of participants in the process to quantitative data dashboards to assess interim indicators, shorter term outcomes, and longer term goals and impact; and participants will plan their cycles of action research based on analysis of those data, among other qualitative sources.

d) Phase II:

    i) Evaluation focus on Outcomes and Impacts, per Measure N, with quantitative data input from RAD;

    ii) Phase II monitors and analyzes quantitative interim indicator and outcomes data for all ten years of the Initiative;

    iii) Phase II completes both descriptive as well as analytical statistical reports;

    iv) However, more emphasis will be placed on Interim Indicators and short term Outcomes early on, and longer term Goals in the second half of the term of the Initiative.

4) Partnerships:

A partnership between an external evaluation consultant/advisor, the OUSD Linked Learning Office for High School Improvement (LLOHSI), Teaching and Learning, and the office of Research, Assessment & Data (RAD). The LLOHSI will manage the project and provide coaching, facilitation, and technical support to the various levels of the evaluation, as well as engaging in its own cycle of action research. There may be additional community partners (referred to as "Boundary Partners" in the literature).

Measure N Participatory Action Research Design Diagram

Principal Community of Practice Cycle of Inquiry

LLOHSI Support, Cycle of Inquiry, & Evaluation Management

Coach Community of Practice Cycle of Inquiry

RAD Quantitative Data Dashboard Input

School Leadership Cycle of Inquiry (CIG, SPSA)

Content Area PLC Inquiry

Pathway Continuous Improvement Cycle

Community of Practice Instructional Design & Revision Cycle

Nested Cycles of Inquiry/ Action Research

1 VISION, PLANNING, & PATHWAY DESIGN

2 STRUCTURES & SCHEDULES

3 CoP, PERFORMANCE BASED ASSESSMENT & CURRICULUM

4 ENGAGED LEARNING & TEACHING

5 EMBEDDED STUDENT SUPPORTS

6 CONTINUOUS IMPROVEMENT

Linked Learning Logic Model: Creating Pathways to Excellence, v.2.3

Draft, September 16, 2015; Revised September 24, 2015; version 2.1, September 29, 2015; 2.2, Oct. 8; 2.3, Nov. 9

"If we have these resources…""…and we engage in these activities…" "…and we make these structural changes…" "…Then we will see these outputs & outcomes…""…And then we will achieve these lasting impacts…" (Theory of Action)

			Implementation	Outcomes	Impacts
Design					
Inputs	Activities	Structural Changes	Outputs		
The Linked Learning Initiative					
• Linked Learning Initiative Design (& Essential Elements, initiative parameters) • Existing CPA's & $ • Existing Pathways • Measure N Design & $ • District LLO • Site Leadership & Capacity • Teachers • Students • Families • Industry Partners, $$ • Community Partners	• Design Team forms & meets (CoI) • Site Admin + Pathway Leads Meet (CoI) • Pathway CoP's meet (CoI) • LLO Supports Sites & Pathways • Coaching, CCRS, etc. • Professional Learning Op's for Pathway Leads & Teams • LLO aligns w/ HSN, T&L, etc. (policy, practice) • Professional	Master Schedule Supports: • Pathway cohort scheduling, students • Pathway cohort scheduling, teachers (collaboration time) • WBL continuum of experiences, including internships • Dual enrollment op's. • Integrated project-based curriculum x-content areas in pathways • Common formative assessments & rubrics Graduate Capstone –	Adult Experience: • Pathway Community of Practice engages in Pathway Continuous Improvement Cycle (long cycle) & Instructional Design & Revision Cycle (short cycle) (data-based inquiry & professional learning) • Teachers experience various initiatives as integrated into pathway work (CCSS, NGSS, TGDS, CTE) Student Experience: • Personalization • Engagement • Real world meaningful learning • High expectations/ challenging common core aligned curriculum	"CCC Ready Graduate" (Graduate Profile) + College Acceptance & Persistence + Career-Relevant Certificates + Graduation Rate - Dropout Rate + Pathway Persistence + A-G Completion Rate + A-G On Track - Disciplinary Actions + Attendance	"College, Career, & Community Success"
• UC & CC System Supports & Partnerships • Philanthropic Partners, $$	Learning for Principals • New Options & pathway recruitment process (incl. better branding & messaging)	performance based common culminating assessments Pathway Student Learning Outcomes, Program of Study & CTE courses aligned to support Industry-sector theme Equitable Options & Pathway recruitment system	• Equitable pathway demographics (access, persistence) • SEL & RJ integrated into all experiences • Collaboration • Work based learning experiences (community partnerships) tied to academic learning		
Assessment/ Evaluation					
7 Essential Elements (Linked Learning systemic initiative design parameters) Measure N Self-Assessments SRI Evaluations	Measure N Planning Proposals Measure N Timeline Measure N Plans (as input into the new SPSA) Observations, surveys, document analysis	7 Essential Elements Measure N Self-Assessments OUSD Pathway "Non-Negotiables" for site structural changes Document analysis	Behaviors of Learning & Teaching rubric Community of Practice Continuum rubric 7 Essential Elements (OPTIC) rubric Graduate Capstone Designs TGDS Surveys, observations, focus groups, interviews	RAD data dashboards SRI Evaluations	National Clearing-house data on college persistence Workforce data on employment

General Approach

The LLOHSI will manage, coach, facilitate, and provide technical assistance for the PAR/EE design and process. Each key stakeholder group will participate in framing inquiries appropriate to their level and work in the design and implementation of the Measure N Initiative, and will collaborate to collect and analyze both quantitative and qualitative data (i.e., indicators and measures of student, teacher, school, and district processes, practices, and outcomes). The LLOHSI will develop a detailed study design that provides a description of the overall evaluation plan. The study design will include:

- purpose
- overarching evaluation questions aligned to focus and purpose
- key audiences/ stakeholders for the evaluation
- key communities of practice whose work will constitute the various cycles of inquiry
- a conceptual framework for the evaluation, including a brief literature review of relevant existing studies of similar initiatives and studies, as well as a logic model for the design, implementation, and outcomes of Measure N
- reference to baseline data and analyses from the SRI cluster evaluation of the James Irvine Foundation funded Linked Learning District Initiative longitudinal evaluation of nine districts (DI9)
- key factors, variables, and indicator definitions
- specific methods – including samples, instrumentation, and protocols – proposed for use, and their relationship to the evaluation phases, questions, and time-lines
- a management plan to support (coach, facilitate, provide technical assistance; timelines, tools, processes, etc; data management) all key stakeholder groups to participate in their part of the overall PAR/EE design and conduct
- plans for the study utilization by key stakeholders
- the plans for the comprehensive structure and protocols for OUSD to continue to conduct longitudinal research beyond the scope of this study.

Example of Nested Cycles of Inquiry

I. Pathway Teacher Team (community of practice) Cycle of Instructional Design and Revision (Green Energy):

   A. The Green Energy Pathway Leads planned and facilitated several cycles using this inquiry process to backward map from their Pathway Student Learning Outcomes to [externally validated] Common Criteria and Rubrics that the team used to generate some Common Performance Assessment Tasks. They then designed Units of Instruction in their different Content Areas that addressed those Performance Tasks. They next used the Performance Tasks to Monitor Student Learning, and brought examples of the student work back to their Community of Practice for analysis to Improve their Practice, and then iterated. The Pathway Leads then reflected on the team's progress as individual teachers and as a team, and facilitated reflection meetings on this progress using the Community of Practice Continuum Rubric.

II. Pathway Continuous Improvement Inquiry:

   A. All Pathways complete a Pathway Continuous Improvement data analysis and planning process each year, based on demographic and achievement data provided by RAD and narrative data from teacher experiences; those analyses result in goals and plans for improvement work during the year. This year for the

first time, those planning processes have folded into the Measure N planning process as captured in the SPSA.

III. Pathway Leads and Principal Recruitment Equity Action Research:
   A. For the past two years, the Pathway Leads and Principals at Oakland HS and Skyline HS have engaged in a data-based inquiry into how equitably balanced existing pathways are across many data points (ethnicity, gender, achievement, special education students, ELL students, etc.), and developed iterations of prototype strategies to increase equity in and across pathways.

IV. Castlemont Schoolwide Measure N Design Team Action Research:
   I. The Castlemont Design Team is implementing an action research framework for the whole school design process. Overall this process consists of:
      A. Assessing the current reality
      B. Defining the issue(s)
      C. Developing a Theory of Action and Action Project Pilot
      D. Identify goals and a collective Plan of Action for action pilot project
      E. Reflection and Presentation of findings from the Action Project Pilot
   The Team built from the work completed last year during the Intensive School Support (ISS) school design writing process and utilized the data and root cause analysis to identify a pilot project for the semester and to begin writing Theories of Action. Based on the sections of the school design proposal, each committee (Culture, Education, Teaching) wrote a ToA based on identified priorities from the proposal. Each committee lead is in turn a member of the Administrative Leadership Team for the school, which was also serving as the Leadership Committee as outlined in the ISS proposal. This overlap allowed for both design and operational aspects to be covered in the school improvement transition process. Furthermore, Leadership engages with the Community Engagement Team to involve students, parents and community in the process.
   Once ToAs had been written, each committee worked to create an action plan consisting of SMARTe goals and tasks to implement and data to collect on the pilot project. The lead for each committee will further the work with their respective constituents, processes and structures; for example, the Teaching lead worked to create a Culturally Responsive Teaching framework and design labs for teachers to create curriculum together.
   Committee leads and committees are currently collecting data on the Theories of Action and pilot projects that will be reviewed, adjusted and ultimately presented at the end of the year.

V. Principal Community of Practice Action Research:
   A. Network Superintendent leads Principal Professional Learning inquiry. Participating in learning walks at sites based on a problem of practice lifted up by the site, the Principal CoP provides "critical friendship," dialogue and analysis based on the data from the visits, to support each other's learning and leadership growth.

VI. Linked Learning Office of High School Improvement Case Studies:

A. The LLOHSI has begun a series of case studies of our high school settings, focusing on data collection and deep analysis of specific work and challenges. We are using this process to support deep conversations in our team about how we support the sites. The purpose of this inquiry is to help us be more strategic, aligned, and transformational, and less transactional, in our work with sites.

Methodology
The final design will clearly delineate the overall methodology for the study, including participatory methods, data collection and management strategies that will be used for obtaining the necessary data (qualitative data collection may include strategies such as case studies, document analysis, interviews, focus groups, site observations), and a description of the analytical procedures that will be used to answer the chosen evaluation questions.

Methods may include such **participatory analytical procedures** (action research cycles of inquiry) as:
1. instructional design and revision cycles of inquiry,
2. pathway continuous improvement inquiry,
3. content area PLC inquiry,
4. school site leadership system CIG cycles of inquiry,
5. coaching inquiry cycles,
6. Principal community of practice inquiry, and, in addition,

...include using **more traditional processes** such as:
1. content analyses,
2. case studies,
3. narrative descriptions,
4. longitudinal analyses of academic growth patterns,
5. cohort matched data analyses, and,
6. descriptive as well as analytical statistical methods.

The final design will address justification for appropriate choices of quantitative and qualitative methods and analyses of data collected for this study, explaining how the methodology will obtain the information needed to address the evaluation purpose and answer the evaluation questions, including addressing threats to validity in the stated methods, and provisions for exploring alternate explanations as appropriate.

In addition, the final design will explicitly state:
- the degree to which the evaluation questions can or cannot be answered with the available data,
- other proposed data sources,
- any anticipated problems and their proposed solutions in conducting the study, and,
- limitations of the overall approach and how to address them.

The final design will identify and address any confounding variables that may affect this study. These may include, but are not limited to:
- challenges to validity and complexity inherent in highly participatory methods,
- school district variation in program data collection,
- reporting techniques and practices, and,

- the intervening impact of other key state, district, or union initiatives and requirements (e.g., changes in the state testing program, limited autonomy in selecting teachers, district-wide use of a particular adopted curriculum, other potentially competing initiatives, etc.)

Roles & Responsibilities of OUSD Project Management in the LLOHSI

As the managing organization within OUSD, the LLOHSI will work closely with pertinent stakeholders, departments, and personnel within the district, the Measure N Commission, and the community. The purpose of this ongoing working relationship is for the LLOHSI both to support the various action research teams to do the work, and to provide written and verbal briefings about the progress of the evaluation to ensure that timelines are being met, cooperatively to resolve issues as they arise, and to share information pertinent to the evaluation, including relevant early and periodic formative findings that may help the District and the Commission make mid-course corrections in the effort. LLOHSI staff on this project, and including the RAD division, and the OPSR, will:

Work with key stakeholders on an ongoing basis to keep them involved in and informed of developments in the Measure N processes:
- Build initial and ongoing engagement of key stakeholder and community of practice teams that will constitute the action researchers;
- Assist in developing of all data-collection instruments;
- Review and approve all data-collection instruments;
- Coordinate access to relevant OUSD databases and data sources;
- Assist in supporting (managing, coaching, facilitating, and providing technical assistance) district teams, school leaders, school sites / pathways for their contributions to this study;
- Assist and/or participate as an observer in data-collection activities, including field work such as school visits or focus groups;
- Manage compiling, cataloguing, and housing data from across all action research teams;
- Review statistical methods;
- Review qualitative and quantitative data analyses;
- Co-analyze quantitative and qualitative data, as appropriate, with various stakeholder groups and community of practice (PAR) teams;
- Periodically convene action research teams from across the district for "critical friends" co-analysis, planning, and best practice sharing sessions;
- Coordinate with any outside partners and/or advisors;
- Meet and confer with key stakeholders, action research teams, and any outside advisors about study implementation as needed;
- Write, review, and/or approve drafts, formative reports, and final versions of required reports.

Required Products and Reports, Timeline

Timeline:

The **Table of Contents** will identify major points of discussion by page. The **General Approach** will provide an overview of the approach to be taken in addressing the evaluation questions and issues. The **Work Plan** will describe in detail the tasks and activities to be undertaken to accomplish the scope and purpose of the project and produce the required products. Any anticipated theoretical or practical problems associated with completion of each task will be discussed, and solutions, alternatives, or contingency plans related to these problems will be proposed as appropriate. The work plan will include proposed task initiation and completion dates and proposed staffing.

The **Detailed Evaluation Study Design** will include a conceptual framework for the evaluation, including key variables and indicator definitions. It will provide a description of the study methodology, including activities of the evaluation study, and will include activities related to answering the evaluation questions. The study design will include specific methods, including samples and instrumentation, and their relationship to evaluation questions, tasks and timelines. Appropriate justifications will be provided for each method selected.

The **Management and Staffing** section will present a plan for the internal management by the LLOHSI of study work that will ensure the accomplishment of the tasks, including personnel, roles, and lines of responsibility.

The **Related Experience** section will describe the experience of the evaluation management team in the LLOHSI in providing support and coordination required, including a discussion of previous related work, as well as evidence of: experience with quantitative research, including surveys, sampling methodology, statistical analyses, qualitative research including interviews, focus groups, case studies, and content analysis; and current research and literature about systemic initiative reform and statewide Linked Learning approaches.

The **Examples of Previous Work** section will include at least two samples of an evaluation study design and their accompanying final evaluation reports developed and prepared by the management team in the LLOHSI.

Budget - real $ *per annum*

Required Additional Positions	*Yearly Cost*
.25 FTE Project Coordinator	**$38,150**
1.0 Measure N Ed Pioneer to Facilitate Process	**$112,000**
External Advisor/ Validator	**$30,000**
Website Development, Videography, and Photography	**$20,000**
Total Yearly Cost	**$200,150**

In Kind Personnel - The Evaluation Management Team in the LLOHSI & Partners

    Co-Leads:
        Gretchen Livesey, Director of Linked Learning
        John Watkins
    RAD Data Analyst:
        Kevin Schmidke
    Project & Data Management, Ed Pioneer:
        TBD
    Action Research Facilitators:
        Pathway Coaches @ sites with multiple pathways
    Teaching & Learning & SEL Colleagues:
        Young Whan Choi
        Rigorous Academics Team
    External Advisor/ Validator:
        TBD, most likely David Fetterman
    Partners:
        CCASN
        Mills Scholars Program
        Potential EdD Candidates, UCB & CSUEB

Additional Budget for Central Staff to Support Site-Based Measure N Retreats for PAR analysis & reflection will be required for sites to contribute funds for these costs from their Measure N allocations.