

# North Carolina Innovative School District: Early

Results from Inaugural School (2018-19)

*Prepared for the North Carolina Innovative School District*

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## Executive Summary

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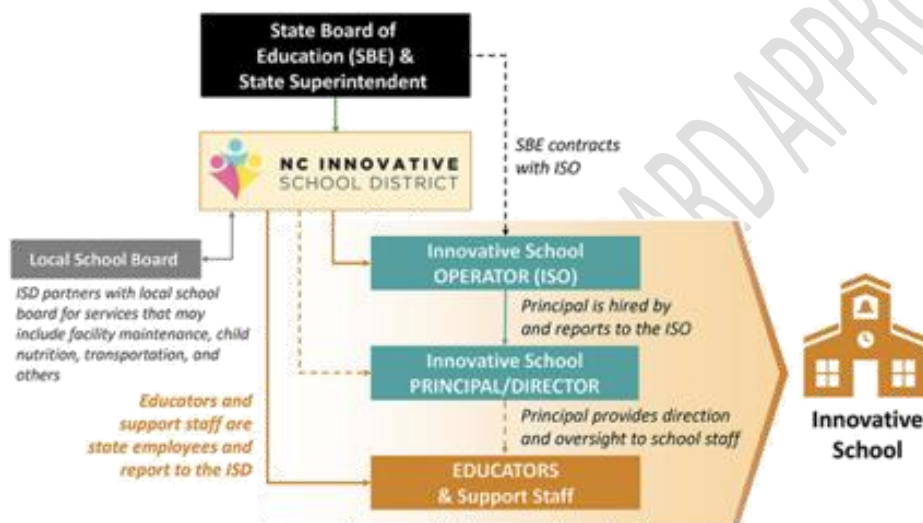
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## Introduction

### Background

With the intent of improving chronically low-performing elementary schools across the state, the North Carolina General Assembly (NCGA) enacted legislation in 2016 to establish a new non-geographic school district—the Achievement School District. In 2017, the NCGA provided additional guidance for the district and changed its designation to the North Carolina Innovative School District (the ISD).<sup>1</sup> Operating within the North Carolina Department of Public Instruction (NCDPI) as a separate North Carolina school district, the ISD is managed by a superintendent who works directly with the State Superintendent and the State Board of Education. Figure 1 provides a visual illustration of the operational structure of the ISD.

Figure 1. Operational Structure of the ISD



### Vision and Mission of the ISD

The ISD's **charge** is to work with identified schools and their communities to foster accountable, data-driven partnerships designed to promote and implement a shared vision of equity and opportunity for students in those schools.

The **vision** of the ISD is to be a bold, unapologetic leader in transforming low-performing schools in North Carolina. Its intent is to establish its leadership role through the creation of strong community partnerships, strategic coalitions, and the innovative implementation of data-informed practices.

<sup>1</sup> Evaluation-relevant components of the legislation and links to the full enacting legislation are included in [Appendix A](#).

The **mission** of the ISD is to improve student achievement by creating innovative conditions in partnership with communities across North Carolina, with a focus on equity and opportunity in low-performing schools. The ISD intends to accomplish this by:

- Re-defining (expanding the definition of) what a “good” school is;
- Aligning local and state expectations for schools—honoring community needs for their schools while also acknowledging state needs for the school;
- Creating conditions for innovation (school-, community-, and policy-level) that will facilitate NC to broaden its perspective on how to transform all lower-performing schools;
- Raising awareness and changing expectations at the school/community level (among parents, community representatives, and other local stakeholders);
- Creating a sense of urgency and accountability at both the state and local levels, which will help re-prioritize the state’s approach to education;
- Empowering local-level stakeholders to act on that urgency; and
- Conducting the work with a Research-Practitioner Partnership mindset.

To meet this vision and mission, ISD leadership has designed two distinct management strategies for school improvement: third-party management and local-level I-Zone management.

### *Third-Party Management*

The first strategy involves transferring low-performing schools from their local education agencies (LEAs; North Carolina’s formal term for traditional local school districts) into the ISD, where they are operated by an Innovative School Operator (ISO). In 2017, the ISD superintendent identified 48 elementary schools across 21 LEAs that qualified for consideration for the first cohort of ISD schools. In 2018, ISD identified 14 schools (eight of which also had been identified the previous year) across nine LEAs. In 2019, ISD identified 12 schools (five of which also had been identified in one or more earlier years) across 10 LEAs ([Appendix B](#)). Identification was based on four criteria:

- Include all or part of grades K-5;
- Earned an overall school performance score in the lowest five percent (5%) of all schools in the state in the prior school year;
- Did not exceed expected growth in at least one of the prior three school years and did not meet expected growth in at least one of the prior three school years; and
- Did not adopt one of the already-established reform models available via state statute in the previous school year.

By general statute, ISOs are described as “entities” and fall into two broad categories:

1. The entity has a record of results in improving performance of persistently low-performing schools or improving performance of a substantial number of persistently low-performing students within a school or schools operated by the entity in this State or other states.
2. The entity has a credible and specific plan for dramatically improving student achievement in a low-performing school and provides evidence that the entity, or a contractual affiliate of such an entity, is either currently operating a school or schools in this State that provide students a sound, basic education or demonstrating consistent and substantial growth toward providing students a sound, basic education in the prior three school years.

Examples of eligible entities include:

- Established local, state, or national non-profit with a proven school turnaround record
- College or university that employs a proven turnaround school leader(s)
- Proven/credible charter management/education management organization
- Corporation/business with a credible plan and a proven turnaround school leader or leaders
- Proven school turnaround leader who creates her or his own entity
- In the event that temporary management is necessary due to contract termination, lack of a qualified ISO, or other unforeseen emergency, the ISD is authorized to act as an ISO.

**2017.** After several rounds of review, Southside Ashpole Elementary school in Robeson County ultimately was chosen for transfer into the ISD for the 2018-19 school year. After a competitive bid, vetting by an external reviewer, and approval from the State Board of Education, the ISD engaged Achievement for All Children<sup>2</sup> to manage operations at the school for five years. The contract establishes performance metrics that define expected progress for improvement in student achievement.

The ISD superintendent managed partnerships between Achievement for All Children, parents and families, the LEA, and other community partners.

**2018.** The ISD identified Carver Heights Elementary School in Wayne County as the second ISD school; however, the North Carolina General Assembly overturned the identification<sup>3</sup> and Carver Heights remained a part of Wayne County Public Schools. In January 2019, the North Carolina State Board of Education approved “Restart” status for the school, which means that Wayne County Public Schools is responsible for the school’s academic turnaround. As a result, no new schools were identified for transfer for the 2019-20 school year; however, if Carver

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<sup>2</sup> <http://aac.school/>

<sup>3</sup> North Carolina General Assembly Session Law 2018-145  
(<https://www.ncleg.gov/Sessions/2017/Bills/Senate/PDF/S469v8.pdf>)

Heights does not show academic improvement over the 2019-20 and 2020-21 school years, it can be turned over to the ISD for the 2021-22 school year.

*2019 Forward.* In September 2019, the ISD identified 12 schools for consideration for the 2020-21 school year, with October 15, 2019, set as a date for finalizing recommendations and presenting them to the State Board of Education, which will act on the recommendations by January 15, 2020.

Under current legislation, the ISD must take over five schools by the start of the 2021-22 school year; however, pending House (H798) and Senate (S522) legislation being considered during the 2019 session of the North Carolina General Assembly<sup>4</sup> could result in significant changes to the identification process. In particular, the proposed legislation would require schools to go through a three-year process from the time of first qualification before joining the ISD. During that three-year window, a qualifying school could be removed from ISD consideration if it demonstrates academic improvement. In addition, both versions expand school operator eligibility to include the possibility of management by the Department of Public Instruction; the House version also includes the possibility of management by a consultant in conjunction with the LEA. These and all other pending changes are outlined in greater detail in [Appendix C](#).

### *I-Zones*

The second ISD strategy involves a more comprehensive effort with a partnering LEA that is hosting an ISO as part of the first strategy. In this second optional scenario, the participating LEA can propose operating a group of its low-performing schools via a new management model called an Innovation Zone (I-Zone). In the I-Zone, the local school superintendent and school board are granted increased flexibility by the State Board of Education, upon recommendation of the ISD superintendent, with approval for five years. Flexibility may include options such as extending the school day, altering school calendars, and instituting creative school staffing and compensation models. If an I-Zone is approved by the State Board of Education, the ISD superintendent provides up to \$150,000 in matching funds (matched 1:1 by the LEA) for up to five years to support the effort. The schools in an approved I-Zone are led by an Executive Director and her or his team. While the Executive Director's appointment requires the approval of the ISD superintendent and the State Board of Education, all other governance decisions remain with the LEA. I-Zone school goals are to exceed expected growth by the last two years of their five-year contract. The ISD superintendent can transfer management of any I-Zone schools that do not meet expected benchmarks during the last two years to the approved ISO partner that already is working in the LEA as part of the first strategy.

Robeson County Schools declined the option to establish an I-Zone when Southside Ashpole was selected.

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<sup>4</sup> North Carolina General Assembly House Bill 798 (<https://www.ncleg.gov/BillLookUp/2019/H798>); North Carolina General Assembly Senate Bill 522 (<https://www.ncleg.gov/BillLookUp/2019/S522>)



## *Evaluation of the ISD*

To ensure that progress in its schools is evaluated effectively, the ISD partnered with an independent evaluation development team—composed of staff from the Friday Institute at North Carolina State University and RTI International—to develop a multi-year plan for assessing outcomes of the initiative. The ISD partnered with the Friday Institute to conduct the evaluation. While it is possible that future participating LEAs will exercise their option to establish I-Zones, the scope of the evaluation is limited to the first strategy—third party management by an ISO. I-Zone schools will be included in a special category of comparison schools for the quantitative analyses, should any participating LEAs establish I-Zones.

The ISD is responsible for submitting an annual report to the State Board of Education and the General Assembly (due by November 15 each year). The annual report includes information related to student performance, school-level operation, and overall ISD operation and management, with a focus on the following measured outcomes, as identified by statute (see [Appendix A](#) for more details):

- Public school student **enrollment** in each ISD School, including student demographics (Headcount);
- Public school student **admissions processes** and the number of students enrolled under the admissions category at each partnering ISD school (Compliance Monitoring);
- Student **achievement data**, including school performance grades and student achievement scores and student growth scores, at each ISD school (Longitudinal Academic Monitoring [Raw Values over Time]);
- Student **academic progress** in each ISD school as measured against the previous school year and against other schools located in the local school administrative unit and statewide (Quantitative Analysis);
- Student **discipline** data in each ISD school as measured against the previous school year and against other schools located in the local school administrative unit and statewide (Longitudinal Academic Monitoring)
- **Best practices** resulting from ISD school operations (Qualitative); and
- Other information the ISD superintendent, State Superintendent, and State Board of Education considers appropriate.

The ISD annual report is based in part on an annual report developed by the evaluation team; the current document is the first of these reports.

In addition to the legislatively-mandates components of the public reports, the stakeholder version of the report also includes evaluations of some aspects of **non-test score-based student performance**, school-level **operation**, and overall ISD **management** and operation, as outlined in a logic model constructed with the ISD leadership team ([Appendix D](#)).

## Evaluation Questions, Measurable Outcomes, and Analyses

### *Evaluation Questions*

The enacting legislation outlines several key outcome measures for the evaluation ([Appendix A](#)). The legislation charges the selected ISO to: set clear goals related to higher academic outcomes for students; create safe and positive learning environments for children; ensure parent and community engagement; efficiently and effectively use taxpayer dollars; empower and equip teachers and school leaders to meet the goals; and hold ISD teachers and school leaders accountable to meet those stated goals. The ISO is directed to enter into an agreement with each school principal regarding specific goals for each school.

The evaluation development team worked with the ISD superintendent's team to construct an evaluation strategy that retained all of the required ISO goals and also integrated additional goals to enable evaluators to arrive at a richer and more complete understanding of the outcomes of the initiative. Through multiple meetings with the ISD superintendent's team, the evaluation development team identified specific program goals and outcomes. Through an overall mission and vision statement for the ISD initiative, the superintendent's team expanded the ISD's legislatively-required commitments, and the evaluation development team incorporated that vision into a logic model for the overall initiative (a summary is included in [Appendix D](#)) that graphically represents how ISOs and schools will fulfill those commitments. The ISD superintendent's team identified short- and longer-term outcomes for ISD schools in the following areas: student academic outcomes, learning environments, parent and community engagement, school culture, leadership, and academic and fiscal accountability.<sup>5</sup>

Using the overall ISD logic model, the evaluation development team constructed a set of questions to guide the evaluation:

Q1: Does the ISD improve student- and school-level academic growth and achievement?

Q2. Does the ISD improve learning conditions, including changes in student behavior?

Q3. Does the ISD contribute to changes in school-community engagement?

Q4. Does the ISD contribute to changes in the culture of schooling both in and outside of the ISD?

Q4a. Does the ISD contribute to an overall change in the culture of schooling in ISD schools?

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<sup>5</sup> The evaluation team conducted a similar process to construct a school-level logic model with the first ISO and plans to repeat the process both with other ISOs as they are identified and annually with the first ISO as its implementation at the first ISD school evolves.

*Q4b. Does the ISD change approaches to ensuring sustainable, high-quality staffing in ISD schools?*

*Q4c. Does the ISD change approaches to leadership in ISD schools?*

*Q4d. Does the ISD contribute to changes in the culture of schooling in partnering LEAs, non-participating LEAs, and/or across the state overall?<sup>6</sup>*

The evaluation plan developed to address these questions meets the legislative requirements, while also providing greater breadth and depth of information in areas of importance to ISD leadership.

### *Measurable Outcomes*

The evaluation development team next identified measurable outcomes that align to the overall goals and commitments of the initiative. Measurable outcome statements are listed below by evaluation question. Outcome statements in **red** address evaluation components highlighted in the enacting legislation, and statements in **black** provide important additional context for all measured outcomes. Statements in *grey italics* address evaluation components identified by ISD leadership as areas of interest for their own internal evaluation efforts; due to budget constraints, only some of these can be addressed in each annual report.

*Q1: Does the ISD improve student- and school-level academic growth and achievement?*

- **ISD schools achieve and maintain performance scores at or above a C.**
- **ISD schools' academic outcomes compare favorably to eligible but non-identified schools.**
- ISD students demonstrate academic proficiency.
- **ISD schools demonstrate academic growth.**
- ISD students exhibit more growth than students at matched a) local schools (possibly including I-Zone schools), b) transformational schools, and c) considered but non-selected schools; also vs statewide growth averages.

*Q2. Does the ISD improve learning conditions<sup>7</sup>, including changes in student behavior?*

- *ISD student support services meet statutory requirements.* [Not addressed by this evaluation]
- **ISD schools establish a safe and positive learning environment.**
- ISD schools experience reduction of behavioral referrals.

<sup>6</sup> Evaluation sub-question 4d is for internal ISD evaluation planning only; questions and data collected related to this question are not part of the formal, public evaluation. See note below re: **red** and *grey italics* text.

<sup>7</sup> The evaluator should work with ISD leadership to delineate specific learning conditions to be tracked.

- ISD schools experience reduction of student absenteeism and/or increased attendance.

### Q3. Does the ISD contribute to changes in school-community engagement?

- Community engagement grows in ways that are attributable to the ISD.
  - *Formal relationships are established between ISD schools and community representatives. [Not addressed by this evaluation]*
  - *In-kind supports and services provided to ISD schools change in positive ways. [Not addressed by this evaluation]*
- Parent engagement grows in ways that are attributable to the ISD.
  - *ISD parents/guardians understand academic expectations and standards.*
  - *ISD parents/guardians understand connections between student engagement and academic outcomes.*
  - *ISD parents/guardians participate more frequently in the life of the school.*
  - *ISD parents/guardians participate in the academic life of their own students.*
- ISD school staff and community member feelings of empowerment grow in ways that are attributable to ISD school-community engagement efforts.

### Q4. Does the ISD contribute to changes in the culture of schooling both in and outside of the ISD?

#### Q4a. Does the ISD contribute to an overall change in the culture of schooling in ISD schools?

- *ISOs lead diffusion of best practices across ISD schools. [Not addressed by this evaluation]*

#### Q4b. Does the ISD change approaches to ensuring sustainable, high-quality staffing in ISD schools?

- *The ISD implements process to build a local, sustainable teacher workforce pipeline. [Not addressed by this evaluation]*
- ISD schools recruit effective staff.
- ISD schools retain effective staff.
- ISD schools create an effective structure for holding staff accountable.
- *ISD schools promote a culture of professional learning among teachers.*

#### Q4c. Does the ISD change approaches to leadership in ISD schools?

- ISD schools exhibit fiscal efficiency and effectiveness (included in formal evaluation reports when provided to Team by ISD leadership).

- *ISD schools are led by effective school administrators.*
- *ISD schools adopt effective leadership strategies.*
- *ISD schools establish a diffused leadership model that includes teacher leadership.*

**Q4d. Does the ISD contribute to changes in the culture of schooling in partnering LEAs, non-participating LEAs, and/or across the State overall?**

- *ISD leadership encourages diffusion and replication of strategies identified as effective practices to partnering LEAs. [Not addressed by the evaluation]*
- *Non-participating LEAs demonstrate leadership-level changes in approaches to school leadership. [Not addressed by the evaluation]*

### **Data Collection and Analysis**

Thoroughly addressing these evaluation questions and measuring these outcomes requires a mixed-methods approach that incorporates quantitative and qualitative data from a variety of sources. While some of the questions focus on the performance of students in ISD schools, others examine the ways in which these schools operate and the extent to which they engage their local communities. Table 1 provides a high-level crosswalk between the evaluation questions and the relevant sources of data.

**Table 1. Data Sources Matched with Evaluation Questions**

<b>Source of Data</b>	<b>Related Evaluation Questions</b>
North Carolina administrative and Report Card data	1, 2, 4b, 4c
Student surveys	2
Parent surveys	2, 3, 4c
Practitioner surveys	3, 4a, 4b, 4c
Practitioner focus groups	3, 4b, 4c
North Carolina Teacher Working Conditions Survey	2

**Appendix E** provides a complete crosswalk between evaluation questions, measurable outcomes, indicators, and data sources; the previous evaluation report<sup>8</sup> includes additional details about the data collected from each source and connections between those data and the evaluation questions.

<sup>8</sup> Stallings, D. T., Rosof, L., Halstead, E., Knapp, L., and Rice, O. (2019). *North Carolina Innovative School District Evaluation Commitments*. Prepared for the North Carolina Innovative School District. (submitted to the North Carolina State Board of Education, January 9, 2019; not posted online)

Due to contract finalization timelines, the evaluation team was not able to commence data collection for this report until spring 2019.

Because only one school opened in the first year, the evaluation plan was constructed on the premise that the first full baseline year would be the 2019-20 school year (the year in which multiple ISD schools were scheduled to open); however, as noted above, the identification of a second school (to be brought into the ISD for the 2019-20 school year) was overturned. As a result, the original intent to classify 2019-20 as the baseline year for ISD has been modified; now, each school's first year (regardless of start year) is classified as a "baseline year," with the second year of operation designated as the "growth year," and the third year of operation designated as the "measurable trend" year. In future reports, results from the first identified school will be reported separately from results in all other ISD schools, on the premise that all subsequent ISD schools will learn early implementation strategies from the first school's baseline year; i.e., implementation for all other ISD schools should reflect the final vision for the ISD initiative more accurately.

#### *Analyses of North Carolina Administrative and Report Card Data*

The full set of administrative data typically only become available to evaluators several months after the end of each school year (usually no earlier than December); therefore, full analysis and reporting of results from administrative data typically occur in spring of the following school year. Though school-level Report Card data were available for 2018-19 earlier than usual (September), they were not available early enough to allow for rigorous analysis. In addition, since only one ISD school opened in the inaugural year (2018-19), the evaluation team considers administrative data analyses included in this report to be **preliminary** and **formative** only. **As a result, the evaluation team incorporated only descriptive analyses of 2018-19 data in this first report.** Table 2 shows an estimated timeline for administrative data analysis for the four-year evaluation; **Appendix F** includes details about the analyses that will be conducted as more data become available and as more schools are added to the ISD.

*Table 2. Timing of Analysis of Administrative Data*

	2018-19	2019-20	2020-21	2021-22	2022-23
Inaugural School (opened 2018-19)	—	C <sub>0</sub>	C <sub>0-1</sub>	C <sub>0-2</sub>	C <sub>0-3</sub>
Additional ISD Schools (open 2020-21)	—	—	—	C <sub>0</sub>	C <sub>0-1</sub>
Comparison School Analysis	—	✓	✓	✓	✓

**Key:** C=Collect and Analyze; Subscript #=Student Cohort (0=Baseline, 1=Growth, 2 and 3=Measurable Trend)

**Note:** Data collection is delayed by one year. Anticipated completion of analysis is **spring** of indicated year.

The first ISD school is an elementary school with grades pre-Kindergarten through grade 5. For students between grades 3 and 5, the evaluation team collects end-of-grade examination data. For grades K through 2, in order to capture early reading growth, the evaluation team originally proposed to collect mCLASS reading diagnostic examination data; however, due to changes in

the diagnostic tool used,<sup>9</sup> the evaluator will revisit with ISD officials the original strategy for analyzing changes in reading outcomes for students in those grades. It is important to note that these early-grade formative instruments are not designed for summative assessment, so any results presented in future reports will be reported with all appropriate caveats. All reporting is at the grade or school level (no individual student-level data are being collected) and includes Education Value-Added Assessment System (EVAAS) scores and School Report Card grades.

### *Comparison Schools*

Because the North Carolina administrative data include all students in the state's public school system, the evaluation team had several different options for defining comparison groups. The team opted to compare the first ISD school not only to results from other elementary schools in the ISD school's original LEA (Robeson County Public Schools), but also to two statistically-identified comparison schools with student, teacher, and school characteristics very similar to those of the first ISD school (Table F1, [Appendix F](#); see [Appendix G](#) for more information about the matching process). For one evaluation question (Question 1), there is a legislative requirement to compare the average growth of each ISD school with the average growth of all other qualifying (but not selected) schools; as result, the group of schools designated as qualifying but not selected serve as another comparison school pool ([Appendix B](#)).

### *Surveys*

To compensate for the limitations in administrative data, the evaluation has been strengthened by the inclusion of multiple qualitative data sources, the most efficient and dynamic of which are the survey instruments developed for multiple audiences ([Appendix H](#)). The evaluator developed a common pool of survey items from which were created student, practitioner, and parent surveys. While each survey audience was not able to respond to each item, development of a common pool of questions enhanced opportunities for cross-survey analyses for items included in two or more survey instruments. As noted above, data collection for the 2018-19 school year was limited to spring only; the evaluation team plans to conduct each survey twice a year starting with the 2019-20 school year. Full results are located in [Appendix I](#).

*Student Surveys.* The evaluator developed a survey instrument for students in grades 3 through 5 to capture changes in student perceptions of school safety (physical, social, and emotional) and the overall school learning environment.

*Parent Surveys.* To determine the extent to which parents understand the ISD concept and are satisfied with their families' experiences, the evaluator developed a survey instrument for administration to each ISD school's parent/guardian population each spring. The survey focuses on parents' perspectives on learning conditions, including changes in their own students' behavior, awareness of perceived changes in school-community engagement, and changes in school leadership. Questions about school safety capture information about parents'

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<sup>9</sup> In July 2019, NCDPI contracted with iStation to provide reading diagnostic services beginning in January 2020.



perceptions of the physical as well as social and emotional well-being of their children while at school. Questions about a positive learning environment probe for responsiveness of leadership to parents' concerns. Questions about school-community engagement reveal parent knowledge about academic expectations and standards, opportunities for student engagement, level of parent engagement, and perceptions of school leadership.

*Practitioner Surveys.* The evaluator also developed a practitioner survey instrument to be administered to administrative staff and teachers at each ISD school during the spring of each academic year. The practitioner survey focuses on ISD contributions to school-community engagement, as well as ISD approaches to sustainable, high-quality staffing and school leadership. Questions about school culture and school-community engagement capture information about staff perceptions of ISO-provided support for implementation of best practices and for dealing with parents and the community. The survey also gathers information about staff perceptions of accountability, culture of professional learning, and both school and teacher leadership.

*North Carolina Teacher Working Conditions Survey.* The North Carolina Teacher Working Conditions survey<sup>10</sup> is administered statewide in the spring of every even-numbered year by NCDPI and supplements the data collected in the recommended practitioner survey with additional data that are comparable over time with responses from other schools. ***Because no survey was administered during the 2018-19 school year, this data source will be used for the first time in analyses to be completed for the second report (fall 2020), pending timely availability of results.***

### *Focus Groups*

To supplement practitioner survey data, the evaluation team conducted focus groups of a representative sample of the practitioners who are involved in ISD school operations in spring 2019 and will continue to conduct such focus groups at the end of each academic year. Practitioners included classroom educators, school staff, and school and state-level administrators. These focus groups allowed the evaluation team to address more deeply questions about school culture, leadership, accountability, empowerment, parental and community engagement, and the learning environment created through ISD schools (and how those environments serve students' needs).

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<sup>10</sup> <https://ncteachingconditions.org/>



## Results from the First Year of Implementation

As with any major initiatives undertaken by the state or its agents, there is an important distinction between the evaluation of the ISD *initiative* and the outcomes of that initiative in a *single school setting*. The ISD in 2018-19 was represented by a single school, but a fully-realized ISD would include up to four other schools. Measurement of the impact of the initiative would be based on outcomes at all of those schools, with an expectation that performance across those five schools would reflect variability in the levels of success experienced at each.

Consequently, since only one school constituted the ISD during its first year, the evaluation team *strongly cautions against evaluating the initiative as a whole based on single-year outcomes from a single school*. As noted in the previous section, the evaluation team considers the 2018-19 implementation year to be a pilot year, with the ISD, its original Operator and school, and future Operators and schools all able to (and expected to) benefit from the lessons learned during this start-up year.

In addition, while the evaluation team understands that it has become common practice in North Carolina for most examinations of school quality to focus on a review of test scores (and this report does the same by leading with the limited student outcome data available at the time of its completion), we believe this report would be incomplete if it *ended* its examination with the review of test scores. Instead, we have used data from all of the sources described above to provide what we hope is a deeper, more qualitative assessment of some of the possible reasons behind the Year 1 academic outcomes. While we cannot draw a causal line between the Year 1 academic outcomes and the qualitative findings, we believe those findings may help provide a richer context for understanding some of the possible reasons behind the numbers. These findings also may reveal some avenues for strengthening ISD implementation in subsequent years.

### Academic Growth and Achievement

Q1: Does the ISD improve student- and school-level academic growth and achievement?
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#### Preliminary Academic Outcomes

**Overall Outcomes.** As detailed in an earlier section, most academic results for the 2018-19 school year were not available early enough to allow for rigorous analysis before this report was finalized; however initial School Report Card data were released in September 2019, allowing us to include some data related to academic outcomes. School-level outcomes for Southside Ashpole, the two matched comparison schools, and the five other finalist schools from the 2017 selection list are included below (Table 3 and Figures 2 and 3, following pages); school-level results for the larger list of comparison schools (other schools on the 2017 ISD list, other Robeson County elementary schools) are included in Table F1 ([Appendix F](#)).

As demonstrated in the table and figures, overall, academic performance for Southside Ashpole at the end of the 2018-19 school year on several different measures appears to have changed little from performance over the four preceding years. Academic performance for the two statistically matched comparison schools (schools statistically similar to Southside Ashpole but not subject to ISD intervention) followed a similar, relatively flat trend, but it is worth noting that most of the five other finalists from the 2017 ISD pool experienced increases in student academic performance in one or more measures, with four of those schools moving from an overall 'F' grade in the year prior to the selection year (2016-17) to either a 'D' or 'C' in 2018-19.

*Table 3. School Report Card Grades and Scores, 2014-15 through 2018-19*

	School Report Card Grade/Score									
<i>School Year</i>	2014-15	2015-16	2016-17	2017-18	<i>2018-19</i>					
<i>ISD Schools</i>										
Southside Ashpole	F	36	F	35	F	27	F	29	F	30
<i>Statistically-Matched Elementary Schools</i>										
Matched School A	F	29	F	33	F	33	F	39	F	36
Matched School B	F	36	D	40	F	29	F	25	F	26
<i>ISD Finalist Schools</i>										
Glenn Elementary	F	39	F	36	F	37	D	50	D	42
Lakewood Elementary	F	38	F	35	F	35	F	37	C	55
Williford Elementary	D	41	F	37	F	26	F	30	F	34
Willis Hare Elementary	D	49	D	48	F	36	D	51	D	49
R B Dean Elementary	F	34	F	36	F	36	D	40	D	43

*Figure 2. School Performance Grade Scores, 2014-15 through 2018-19*

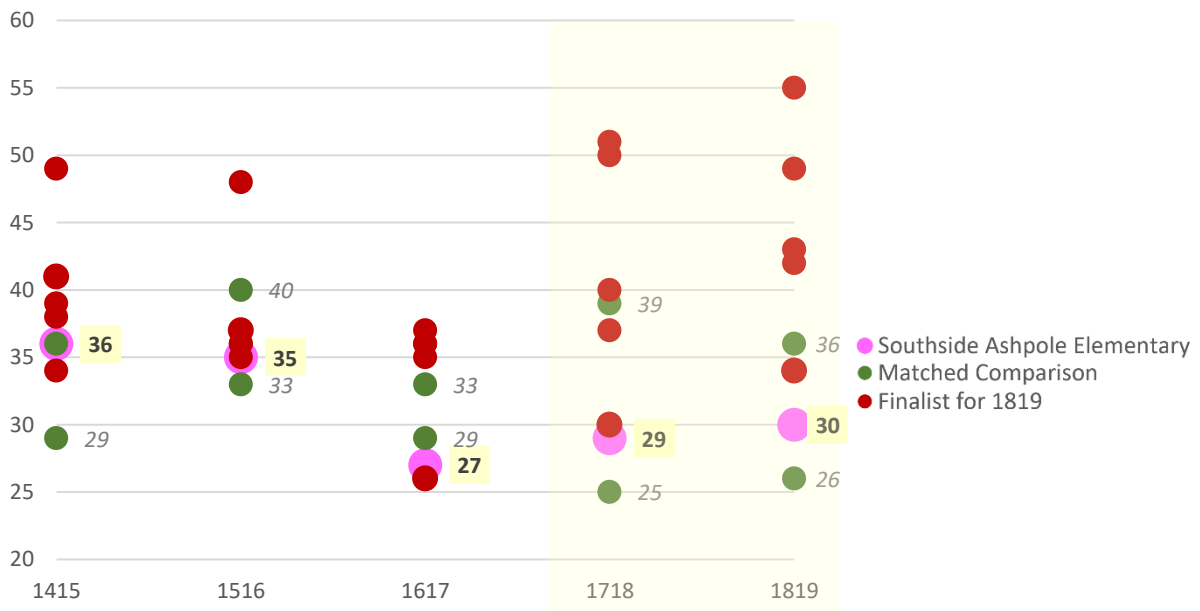
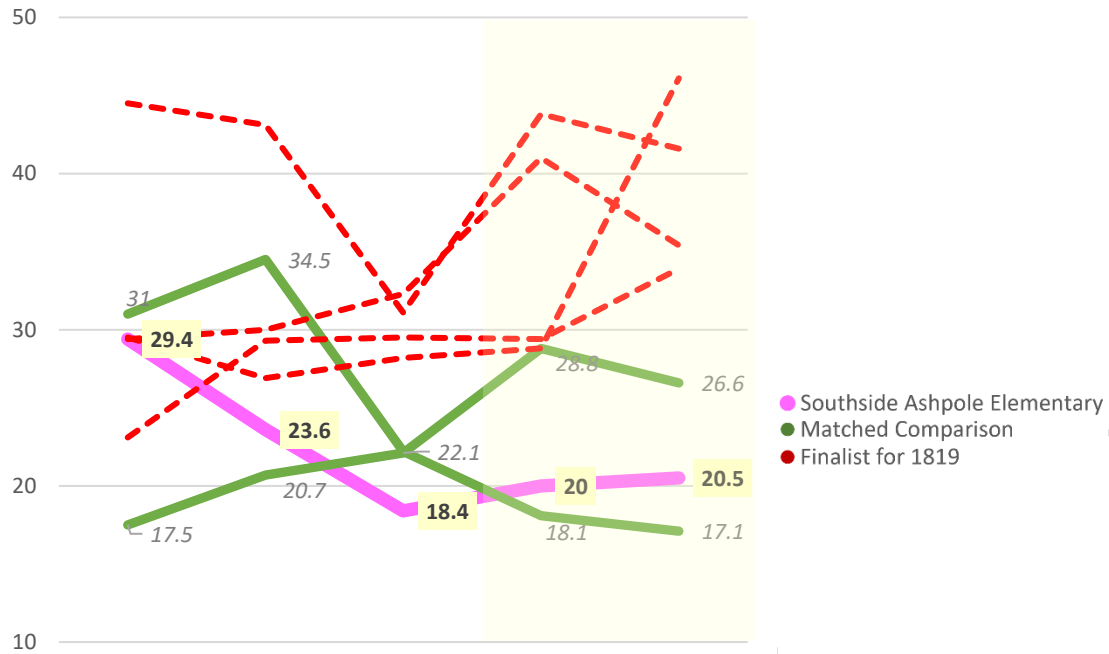


Figure 3. Performance Composite, 2014-15 through 2018-19



**Disaggregated Outcomes.** Equally as important as overall results are results for sub-groups, as school-level results sometimes can hide progress for smaller clusters of students or for individual subject areas. Subject- and grade-level outcomes were presented to the State Board of Education in September 2019<sup>11</sup> but were not available in time for this report to include analyses alongside results from comparison schools. Presented here are the 2017-18 and 2018-19 results as shared with the State Board. On the surface, there appear to have been gains in mathematics between 2017-18 and 2018-19 alongside losses in reading (Table 4).

Table 4. Changes in Growth, 2017-18 to 2018-19

	2017-18	2018-19
<b>Overall</b>	Not Met	Not Met
Reading	Met	Not Met
Mathematics	Not Met	Met

That interpretation is tempered somewhat when we examine grade-level scores. One of the challenges associated with comparing grade-level scores over time is that the students in those grades change year to year. Thus, an “improvement” between 2017-18 and 2018-19 in (for example) Grade 5 mathematics scores may have as much (or more) to do with differences in

<sup>11</sup> <https://simbli.eboardsolutions.com/Meetings/Attachment.aspx?S=10399&AID=188144&MID=5735>

the ability levels of the *incoming* new Grade 5 students and the Grade 5 students from the previous year as it has to do with improvements in instruction in Grade 5. Thus, many of the outcomes in Table 5 are presented so that scores for a given grade in 2018-19 are placed beside scores for the *previous* grade in 2017-18—the grade in which most if not all of the 2018-19 students would have tested in 2017-18.<sup>12</sup>

*Table 5. Changes in Grade-Level Proficiency and College- and Career Readiness Rates, 2017-18 to 2018-19*

	<b>Grade-Level Proficient</b>		<b>College- and Career-Ready</b>	
	2017-2018	2018-2019	2017-2018	2018-2019
<b>All Subject Areas</b>				
Grades 3-5	20.2	19.8	11.3	6.6
Grade 2 to 3		32.1		10.3
Grade 3 to 4	22.6	12.5	11.3	5.6
Grade 4 to 5	20.2	15.7	13.1	*
Grade 5 to 6	18.4		7.1	
<b>Reading</b>				
Grades 3-5	26.2	19.8	13.2	9
Grade 2 to 3		20.5		7.7
Grade 3 to 4	28.6	22.2	11.3	11.1
Grade 4 to 5	33.3	16.7	16.7	8.3
Grade 5 to 6	22.2		8.3	
<b>Mathematics</b>				
Grades 3-5	12.3	21.6	7.9	5.4
Grade 2 to 3		43.6		12.8
Grade 3 to 4	16.7	*	8.2	*
Grade 4 to 5	7.1	16.7	9.5	*
Grade 5 to 6	13.2		*	
<b>Science</b>				
Grade 5	26.3	13.9	8.3	*

\*=5 or fewer students

<sup>12</sup> Some readers may ask whether these two groups of students are comparable; i.e., whether the student population at Southside Ashpole changed significantly—either overall or for certain grades—between 2017-18 and 2018-19. In general, the population was relatively stable, with about 88% of Grade 3 through Grade 5 students returning from the previous year (from Grade 2 through Grade 4). However, taken separately, there was much greater turnover for Grade 3, with only 78% returning from Grade 2 in 2017-18 (compared to 95% returning in Grades 4 and 5), raising a question for future analysis about differences in proficiency between returning Southside Ashpole students and students new to Southside Ashpole.

When examined with this year shift in place, comparing results for the same *students* across two years, many of the apparent gains in mathematics are less compelling than they may appear if scores are compared for the same *grade level* across two years. For example, while Grade 3 mathematics proficiency rates moved from 16.7% proficient in 2017-18 to 43.6% proficient in 2018-19, the two groups of students are not the same. The biggest boost in mathematics when we compare results for the same students across two years appears to be for students who were in Grade 4 in 2017-18 (only 7.1% proficient) and those same students in Grade 5 in 2018-19 (16.7% proficient). Indeed, much of the overall boost in mathematics proficiency from 2017-18 to 2018-19 (from 12.3% to 21.6%) is explained primarily by the relatively high proficiency rate of the Grade 3 students in 2018-19—more than 20% of whom were not enrolled at Southside Ashpole in 2017-18 (see footnote 12).

Still, mathematics scores were higher in 2018-19 than they were in 2017-18. Determining the extent to which those higher proficiency rates in 2018-19 are attributable to improvements in instruction and learning relative to the extent to which they are attributable to differences in grade-level populations will require a deeper examination of the Grade 2 2017-18 mathematics proficiency levels of the 2018-19 Grade 3 students, as well as a close watch for the emergence of any multiple-year trends. Indeed, as we explore in the following sections, several teachers noted both that the new curriculum seemed to provide greater structure and that the younger students at Southside Ashpole seemed to respond more positively to that curriculum.

### *Curriculum*

We begin our qualitative investigation of some of the possible factors behind the Year 1 academic outcomes with a brief review of the adoption and implementation of the school's new curricula.

Before the start of the school year, Southside Ashpole implemented new mathematics and Language Arts curricula. The curricula—Common Core Language Arts (CKLA) and Eureka Math—were chosen by XXX because XXX. Since none of the teachers at Southside Ashpole had used either curriculum before, the school and Operator had planned to provide professional development throughout the year to support implementation of both curricula; however, some teachers indicated that professional development was not sufficient (see [Changes in Approaches to Ensuring Sustainable, High-Quality Staffing](#), below). As one teacher observed, “Professional growth for me [this year wa]s just learning this curriculum.”

While most teachers indicated in focus groups that they liked the curricula and said both provided students with the structure and content necessary to improve their knowledge and skills, some thought they were too rigorous, based on student academic readiness at the start of the school year: “It’s so beyond what they have been exposed to that it’s so hard.” The teachers did believe that, with time, students would become more comfortable with the curriculum and that they would be able to see gains in student achievement. Teachers also indicated that there was no curriculum for science (where Grade 5 proficiency rates were halved between 2017-18 and 2018-19; Table 5), social studies, or for the specials. The specials

teachers indicated that they tried to tie their lessons to what students were learning in class and decided to use the North Carolina standards to guide their curricula.

Teachers also realized as the year progressed that certain North Carolina Standards were not covered by the new curricula; as a result, they had to adjust lessons to include these missing Standards:

[O]nce we realized that, then we've started adding in those pieces that they were missing. But obviously with the hurricane and everything that's going on, we're not going to get to cover everything, but we're going to do the best that we can to cover the missing pieces because it wasn't until just six weeks ago that we even discovered there were missing standards.

All teachers agreed that they try to use student data to improve instruction. Southside Ashpole used MAP® Testing (Measures of Academic Progress®) to benchmark student progress, but some teachers believed that the tests did not always align with the curricula, which made some of the data less useful. Among administrators, only the principal was able to comment directly on the use of student data to improve instruction. He noted that, while the school explored ways for data to inform instruction (indeed, on our first site visit, we saw evidence of such conversations in the staff planning room), staff use of data “isn't at the level I'm accustomed to”—something he attributed to general lack of experience in that area across all staff. The school did provide professional development in data use, but that professional development was limited to within-school trainings, with no opportunity for any staff to gain a broader perspective from external professional trainings. The disconnects between chosen curricula and state standards is a significant challenge, and one that echoes loudly in the larger conversation about the degree to which each ISD school is able to operate with autonomy (see *Broader Observations*, below).

### *Learning Conditions*

**Q2. Does the ISD improve learning conditions, including changes in student behavior?**

#### *Student Behavior*

The Operator and administration at Southside Ashpole introduced new student behavior policies and procedures as part of the operational changes at the school. Focus group participants indicated, however, that some older students—as well as some teachers—struggled to adjust to the changes, primarily because the new policies were different from those to which they were accustomed.

In addition, some teachers indicated that, because their philosophy of discipline did not align with the Principal's, they sometimes chose to handle discipline independently. This discrepancy is significant and contributed to some of the tensions between staff and administration that are explored in greater detail in the *School Culture* section, below. An upper-grade teacher shared this perception of the philosophical divide: “I would never write a referral anymore on my kids.

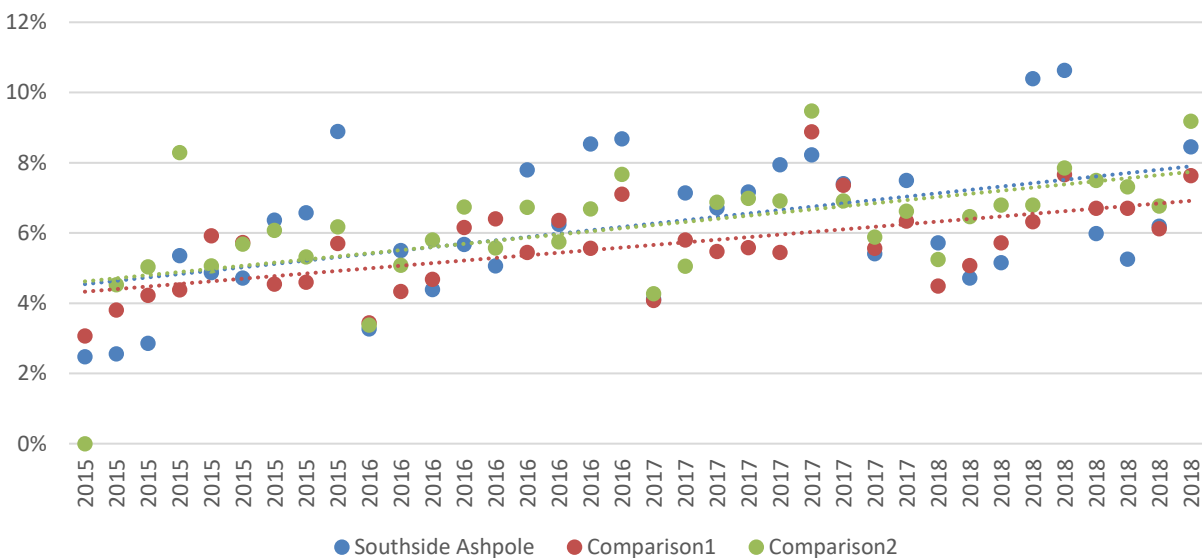
... I'm going to call their parents because I know something's going to happen then. ... If I send them to the office, they're just going to be chilling in the office."

Despite difference of opinion between administration and some teachers with respect to how to handle behavior problems, many staff believed behavior and engagement improved over time as teachers and administration showed that they cared about the students.

### *Student Attendance*

Almost all surveyed parents ( $n=17$  households, 23 students) agreed that regular school attendance is absolutely essential or very important to their children's success in school. At the time of this report, all data for the 2018-19 school year were not available yet, but trend data from previous years will make it possible in the future to identify any significant changes in student attendance rates. In the years leading up to its inclusion in the ISD, Southside Ashpole's month-to-month student absenteeism rates were comparable to those of the statistically matched comparison schools (Figure 4).

*Figure 4. Pre-ISD (Historical) Student Absentee Rates, by Month, Southside Ashpole and Comparison Schools, 2014-15 through 2017-18*



### *Teacher Attendance*

Data on historical and current teacher absenteeism rates were not available in time for inclusion in this report.<sup>13</sup> They will be included in future reports when possible.

<sup>13</sup> In a September 2019 presentation to the State Board of Education (<https://simbli.eboardsolutions.com/Meetings/Attachment.aspx?S=10399&AID=188144&MID=5735>), the ISD provided some preliminary teacher attendance data for the start of the 2019-20 school year.



### *School-Community Engagement*

#### **Q3. Does the ISD contribute to changes in school-community engagement?**

Both the ISD and Southside Ashpole made changes to how the school engaged with parents and the community. In previous years, many events were held during the day, which was not convenient for many parents. For 2018-19, the school offered more evening events to allow more parents to participate. For example, one teacher observed that, for an awards event, “everybody came out.” The school also hosted a data night, a Fall Festival, award ceremonies, and a concert. A teacher who assisted with the concert was told parents would not come, but the teacher happily reported:

The gym was packed, we ran out of seats. It really exceeded my expectations and just the community coming out. I got to talk with parents I have not seen[; there were] children that have come up and said, “This is my mom. This is my dad,” and the parents will say, “Thank you for having this so late because we get off of work at 5:00.”

A high percentage of parents also reported on the Parent Survey ( $n=17$  households, 23 students) that they felt welcomed at the school (82%), felt comfortable talking with administrators (71%), and felt comfortable talking to teachers (76%). However, only about half of all parents (53%) indicated that the school provided them with clear information about what their children were learning in school.

### *School Culture*

#### **Q4. Does the ISD contribute to changes in the culture of schooling both in and outside of the ISD?**

**Q4a. Does the ISD contribute to an overall change in the culture of schooling in ISD schools?**

**Q4b. Does the ISD change approaches to ensuring sustainable, high-quality staffing in ISD schools?**

**Q4c. Does the ISD change approaches to leadership in ISD schools?**

In addition to the lack of ISD-era data for measuring longitudinal changes in the culture of the school, the majority of teachers and administrators did not work at the school in previous years, so most only had access to limited information for making before-and-after school culture comparisons. The notes below represent observations from administrators, teachers, and parents primarily from one school year, with comments about changes over time added when feasible.

### *Overall Changes in the Culture of the School*

**Teachers.** In focus groups, several teachers described their perceptions of the school’s culture the year before ISD, as well as ways in which they believed the culture had changed. With



respect to student culture, one teacher (who had not been there the year before) said that her students noticed a positive change:

Last year they just watched movies all day. They didn't do anything. They tell me all the time, "[Teacher], I wish we would have learned like this last year." So they really didn't do anything last year. They just chilled, kicked back, [ate] popcorn and ha[d] a great time . . . . So now it's completely opposite, they say.

Opinions among teachers differed with respect to whether parents' interactions with students and teachers had changed. One teacher characterized the school as a "typical" low-performing school "with very little positive parent interaction," and that this culture was "the way it was last year." One teacher who had worked at the school before ISD believed that some parents took advantage of the school's change in culture:

I've been here again [multiple] years and I've never seen parents just come in, or I guess they're parents, I don't know. It's like they have access . . . even though the doors are supposed to be locked. Most of the time they're not. They just walk to and from the buildings when they [are] ready. I've never seen that happen [here] before.

Some teachers even shared episodes of parents who exhibited aggressive behavior (e.g., incidents in which a parent had to be escorted off campus by police), but one teacher noted that there were fewer such incidents this year: "I mean . . . that has not happened here this year as often as they did the last year. Last year . . . I knew of three or four different instances where that happened."

*Parents and Students.* In survey responses, parents and students were split regarding their experiences and comfort at school, but over half of responding students ( $n=46$ ) agreed that they felt safe at school (59%), had an adult to help them if they felt threatened at school (67%), and had an adult to help them if they were bullied outside of school (54%). Parents ( $n=17$  households, 23 students) had similar response levels to these items.

*Administrators.* There was general agreement across administrators at all levels—from the Principal to the Operator to the ISD—that the school's overall culture changed at least twice: first, in positive ways, relative to the previous school year, but then in less-positive ways as the school year progressed.

Administrators (many of whom were able to spend significant time at the school in the year before ISD conversion) saw the most positive shifts in student attitudes and behaviors—said one administrator, "I've never met a more eager group of students in my life"—but early positive changes were true for the school as a whole as well. Where before the school atmosphere could be chaotic and disorderly at times, with freedom of movement for students and generally passive teaching behaviors on the part of classroom teachers, administrators noted an immediate change in the sense of order present in the school, as well as in the level of teacher engagement. One administrator attributed some of these changes to the presence of uniforms but said that their impact likely was only one factor of many. Relative to other grades,

5<sup>th</sup> grade posed the greatest challenge across the year, in terms of discipline. One administrator noted that the shift in student behavior and attitudes might have gone even farther, had the school adhered more closely to its plan to incorporate the Core Virtues curriculum (a daily, 20- to 30-minute character-building curriculum) and the 45-minute end-of-day wrap-up alongside the Language Arts and mathematics curricula.

The second culture shift took place midway through the year and was characterized by multiple administrators as a division among faculty and staff with respect to where each turned for leadership—some to the principal, but others to the ISD administration. While generally positive and consistent at the start of the year, rifts between the principal and some faculty emerged as the year progressed. These rifts perhaps were due at least in part to significant changes in leadership at the state level and subsequent changes in the ways in which state leadership interacted with Ashpole leadership, faculty, and staff. According to several sources, ISD leadership became more directly involved in the day-to-day administration of the school.

### *Changes in Approaches to Ensuring Sustainable, High-Quality Staffing*

The Operator had a limited amount of time to hire staff for the first year, and, as a result, may have had a smaller-than-usual pool of talent from which to recruit. In addition, teachers identified aspects of their job and work environment (such as availability of support staff and professional development opportunities) that could impact the school's ability to recruit and keep high-quality staff going forward.

Teachers across grade levels indicated that standard classroom observations took place throughout the year, but other aspects of support for high-quality teaching were less consistent. For example, some teachers felt that the school did not provide enough support staff for teachers. Although the school employed classroom assistants for kindergarten through second grade, a teacher reported frequently being without her assistant:

I've never been used to, in [my grade], not having an assistant in the room. . . . [a]nd this year that has been a challenge for me. . . . [A]fter December, my assistant has been borrowed frequently, quite a bit. Take two weeks for example, I was without support for 61 hours, two weeks. And with [my grade, students are] needy. They have a lot of needs. . . . [a]nd I just feel like that, not having that support, it's impeded learning. And my children, there's been things I wish I could have done beyond the curriculum.

A teacher in an upper grade (who was not provided an assistant) talked about her need for an assistant and using parent volunteers as a supplement:

I just need some support. Because, just like [another teacher] says she needs an assistant, I need one, too. Because I can't be the parent, I can't be the teacher, I can't be the counselor, I can't be the nurse. I can't be all of these things at one time. I have parents come and volunteer to help me, that's how much it is [needed]. It's [been] really tough.

In addition, as noted above, some teachers believed that there were limited opportunities for professional development during the school year, beyond what was provided during weekly planning and meeting time. At least one said that teachers had to seek out and identify their own opportunities and get approval from the ISD; while some teachers took the initiative to do so, many did not. Administrators said that their intent was for teachers to be able to use at least two of their planning periods each week for a joint planning session with same-grade teachers, but that these sessions did not materialized regularly across most grades.

Teachers also indicated that opportunities to socialize with each other is an important component of retaining staff, but that typically there was little socializing among teachers at Southside Ashpole. Some posited that the reason was a combination of the layout of the school and the daily schedule. One teacher said, “Working with our colleagues, you really don’t see them at all,” and another suggested that, based on previous teaching experiences, there could have been more opportunities:

[W]e have, in the past, had opportunities to interact with each other through socials and functions and outings and trips and workshops and things that we’ve done as a whole, but during this year, you don’t have time to interact . . . other than entering and leaving [the building]. . . . [W]e had [one] staff development where we did interact with each other and we were in different groups with the ones that we don’t work with, so that was good, getting to know each other. But [usually there is] no social life at all here.

Finally, some teachers said that they felt that not only was the instructional school day (8:00 AM to 4:00 PM) too long for students, but also that the full work day (7:30 AM to 4:30 PM) was too long for teachers.

Teachers did note that one benefit of the ISD was better resources for their classrooms, compared to the resources provided by Southside Ashpole’s previous LEA (Public Schools of Robeson County). According to one teacher, “Public schools of Robeson County have not gotten basal readers for at least twelve years. They have not purchased reading material. And teachers have had to go out and pull, based on the standards, and pull their material for their classroom.”

### *Changes in Approaches to Leadership*

While administrators indicated that the intent was for teachers and staff to participate in decision-making to a greater degree than had happened at the school in previous years, one administrator acknowledged that, after a good start, in the end, the year was characterized more by a top-down approach to leadership, with limited opportunity for teacher or parent involvement in school decision-making. Most teachers felt that they could approach school leadership with concerns, but there also was ongoing tension with respect to some administrative decisions.

Within their classrooms, teachers experienced varying levels of autonomy, depending on the subject. As noted earlier, the school’s Language Arts and mathematics curricula were chosen by

the Operator as part of the application process, so no teachers were able to contribute to that decision. In addition, teachers were expected to stick closely to curriculum timing guidelines, which only gave them flexibility in how the material was presented. As one teacher noted, “A lot of creativity is eliminated with this curriculum.” On the other hand, since no specific curricula were provided for science, social studies, art, or music, teachers had much more decision-making freedom in those areas.

In survey responses, a large majority of teachers (83%) agreed or strongly agreed that they were encouraged to take on leadership opportunities. Teacher focus group discussions suggested that the primary formal opportunity for teacher leadership was the School Improvement Team (SIT), which was composed of two teachers, the school administration, and two parents. Some teachers indicated, however, that they were not aware of the SIT; another teacher noted that the SIT met irregularly—“We’re supposed to meet once a month, that doesn’t always happen”—and that when it did meet, it often was little more than a venue for administrators to hear feedback from teachers:

We talk about what’s going on, some of the issues that are going on. Or [the principal] explains what’s coming up and asks our opinion. . . . One of the questions they always ask is[, “I]s there anything that you are aware of as far as other teacher concerns that anybody has brought to you or that you’re aware of?”

Most teachers did feel that they had the opportunity to express their thoughts or concerns about leadership informally. On the teacher survey, 58% agreed or strongly agreed that school leadership asked them for their opinions, and 67% agreed or strongly agreed that, if they had a concern about curriculum or policy decisions, they felt comfortable talking to someone in school leadership. In a focus group, a teacher elaborated that the principal “gives you the respect to listen. To listen to you and go in and discuss. . . . He’s always saying his door is open and if you want to see him, you can go in or whatever. So he does give you that opportunity.” Parents felt similarly able to talk to school administration: In their survey responses, 71% agreed or strongly agreed with the statement, “I feel comfortable talking to administrators at my child’s school.” As noted in an earlier section, however, teachers and administrators alike indicated that there was ongoing disagreement about things like the school’s approach to discipline, and administrators admitted that, by the end of the year, there was a clear split between those who looked to the principal for leadership and those who began to look to ISD officials for leadership instead.

### *Broader Observations*

This report has repeated the caveat often that, because the first year of ISD evaluation was based on data collected from one school only, most of the formative findings are relevant only at the individual school level. Even given the limitations of a single-school sample size, however, the first year of evaluation work also produced findings that may be useful for ISD implementers, potential participating schools and districts, and potential operators more broadly. Though these findings are more general than those presented earlier in this report, the same caveats apply: Because they are based on only a single year of observations and data

collection, on data collected at only one school, and on data from the first year of operation, the degree of confidence with which we assert their relevance to ISD more broadly—whether now or in the future—is limited.

### *Strengths and Successes*

*Southside Ashpole Made Some Strides toward Supporting Future Academic Growth.* It is not unusual in school turnaround situations for there to be some tension between allowing teachers to approach their curricula in ways that they believe highlight their personal approaches to teaching and requiring teachers to follow a prescribed approach that allows for less teacher input but that is more consistent across classrooms. As noted earlier, for its first year as an ISD school, the Language Arts and mathematics curricula at Southside Ashpole were characterized more by the latter approach. Teachers at several different grade levels noted that, while the inflexibility in the curriculum was challenging for them (for example, they found it difficult to differentiate, and students in higher grades who had become accustomed to a very different approach to curriculum struggled the most to adjust), in their opinion the curriculum did provide the students with the structure and content necessary not only to improve their knowledge and skills but also to engage them in learning. Teachers made these estimates of degrees of improvement and levels of engagement relative to the quality of the academics provided in previous years, which by most accounts was extremely low, and early quantitative measures of student outcomes show that test scores were no better this year than in previous years, but the full payoff from a radical change in curriculum likely will take more than one year to detect.

### *Challenges*

As earlier sections of this report have detailed, there were many challenges at Southside Ashpole during Year 1, and those challenges grew as the year progressed.

*Successful Implementation Takes Time.* For most complex education initiatives, successful implementation often does not occur until at least the second year, and the same may be true at Southside Ashpole. Much of the first year was about experimentation, learning, and survival. Several teachers and administrators admitted that the first year was a learning year, and that they believed they would not be able to implement a shared, functional plan until at least the beginning of the second year. That assessment now may be somewhat optimistic, as the majority of the first-year staff have departed and the principalship and the Operator's leadership have changed—the school opened in Year Two with an almost entirely new team of educators.

A good example of the learning curve challenge was the general sense of disorder evident in the school's day-to-day operations during the evaluation team's spring visits. There did not appear to be any formal procedure for checking in parents, students, or guests; several students wandered the hallway unaccompanied; and the front office sometimes was left unattended (with students present). To be sure, some of this disorder could be attributed to a relaxed culture carried over by students and parents from previous years, but it also suggested

a school that had not yet been able to find its footing with respect to discipline and other norms.

The start-up challenge extends beyond any single ISD school to the ISD as a whole, which for the entirety of the first school's first year was being developed in real time along with that first school. Even with access to the lessons learned from this first pilot school, any new ISD schools also likely will require at least a year of start-up growth, as one of the key tenets of the ISD model is not to replicate intervention across schools but instead to innovate relative to the needs of each school (even to the point of having different Operators for each school). Complicating matters even more is the degree to which school leadership and staff must integrate into a new community and earn that community's acceptance and support—both school-level and state-level administrators shared as much during interviews.

Ultimately, as noted throughout this document, success should be measured not by results from a single year alone, but instead by sustained success across years, even as the school's leadership and student population both change. These longer-term outcomes will reflect more than just the restoration of stability to the school—raw improvement alone should not be the goal. The truer measure will be the improvement achieved beyond any initial bump in achievement attributable to improvements in school operations.

*Successful Implementation also Requires Mutual Understandings across Leadership Entities.* On paper, the ISD leadership structure is complex, with each school led by a Principal, an Operator, and a state Agency, and with employees of each school hired by different combinations of those entities (for instance, ISD Principals report to Operators, but ISD teachers technically are employees of the state Agency). This complexity was palpable in Year 1, when a single school was the focus of all three entities. The clearest challenge resulting from this complexity was the nearly year-long negotiation across all three leadership entities with respect to their interpretations of the phrase, "charter-like flexibility." The struggle to reach collective agreement on the meaning of the phrase was at the root of much of the tension that developed among the leadership entities—a tension that grew rather than subsided as the year progressed. Even the parameters and procedures for simple actions (such as small-ticket purchases) became opportunities for conflict alongside larger decisions (such as staffing changes). The frustration was so great that, at one point, one leader contended, "I've never [experienced] this much bureaucracy." Without clear, consistent, and comprehensive resolution of each party's understanding of the operationalization of charter-like flexibility in the ISD school setting, the most debilitating problems that surfaced during Year 1 likely will persist, if not worsen—not only at Southside Ashpole but also at any future ISD schools.

*There is Danger of Evaluation Misinterpretation.* As noted above, ISD is an initiative, but Southside Ashpole is only a single school that (to date) has presented a single response in a single setting in a single year to the possibilities of that initiative. Whether the school succeeds or fails ultimately may define success or failure for the initiative as a whole, but perhaps unfairly so: A single school's single-year experiment should not bear the burden of representing a full, multi-school, multi-year implementation.

The challenge extends beyond results from this first year. One of the philosophical underpinnings of the ISD concept is that each school requires a customized plan in order to address each school's unique circumstances. Even the most successful plan possible for Southside Ashpole may not work elsewhere. Because, by design, implementation will vary from ISD school to ISD school, and because even at full operation there only will be a handful of schools, there likely never will be an opportunity to use data from multiple schools to evaluate rigorously any single reform approach—only an opportunity (at scale) to evaluate the *presence of the policy*. Evaluation of the success of any given implementation will be school-level only.

A related challenge is the mismatch between the curriculum freedom given to Operators and the state-mandated measurements of academic growth used to determine ISD school success. Unless Operators are allowed to choose the academic measures that they believe best reflect the curriculum taught at their schools, or unless Operators are required to limit their curriculum choices to those that are best measured by the state's tests, there likely always will be at least some disconnect between actual student growth and student growth as measured by state tests.

EMBARGOED UNTIL BOARD APPROVAL



## Formative Recommendations

Beyond the success or failure of any single school within its jurisdiction, the central question the ISD faces is, “What is required to establish, build, and run a school *district*?” The formative recommendations below, derived from the findings described in earlier sections, are intended to help inform the state’s efforts to address that question.

### *Establish a Common Definition of “Charter-Like Flexibility”*<sup>14</sup>

Above all else, in order to make progress at Southside Ashpole and at any other future ISD school, the state and its operators should work to reduce overlaps in state-, Operator-, and school-level governance by reaching agreement on a common understanding of the flexibility allowed the Operator in running each ISD school. This understanding should be not only with respect to general school administration, but also specific decision-making rights and responsibilities. Many of the leadership and management problems encountered during Year 1 at Southside Ashpole are not likely to be resolved until such agreement has been reached.

A key element of this lack of agreement is each administrative level’s interpretation of the appropriate role of the state ISD office: Is the role to provide support to each ISD school as it develops its own approach to managing a school, or is the role to moderate a balance between individual school autonomy and a core set of ISD principles? In other words, what decisions can be made locally, and what decisions need to be vetted at the state level? For example, after a hurricane closed schools throughout the region, did the decision to re-open (which in the end was made by the ISD) belong to the school, the Operator, or the ISD? As one administrator put it, “We can’t have multiple drivers making multiple decisions.” The principal expressed similar concerns:

[T]here’s Robeson County, ISD, the State School Board, AAC, Team CFA, and there’s . . . me. . . That’s too many people involved. . . I’ve got five [leadership levels making decisions].

Human resources practices are another area of management that could be improved with greater clarity about roles and responsibilities. Most prominent of these is the reporting structure: The principal is an employee of the Operator, but the teachers are employees of the

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<sup>14</sup> The most relevant statute—**115C-75.7. Selection of innovative schools** ([https://www.ncleg.gov/EnactedLegislation/Statutes/PDF/BySection/Chapter\\_115C/GS\\_115C-75.7.pdf](https://www.ncleg.gov/EnactedLegislation/Statutes/PDF/BySection/Chapter_115C/GS_115C-75.7.pdf))—does not include the phrase “charter-like flexibility”; however, this phrase was the phrase used most often by each leadership entity (Principal, Operator, and state Agency) during focus groups and interviews conducted for this evaluation to define—differently—the Operator’s parameters. Subsection (e) (“Waivers for Innovative Schools”) states in part: “[I]nnovative schools shall be required to comply with, at a minimum, the statutory requirements for charter schools as provided in Article 14A of this Chapter. . . . [T]he State Board of Education may grant a requested waiver of State laws or rules for an innovative school pursuant to this subsection, except for a waiver of State laws or rules applicable to children with disabilities and any of the other requirements set forth in this subsection.”



ISD. One of the challenges created by this arrangement was an ongoing disagreement about which leadership entity (the principal, the Operator, or the ISD) makes decisions about the continued employment of faculty and staff—a disagreement that, at least in part, appears to have been responsible for some of the conflicts between school-level administration and staff.<sup>15</sup>

Also, without a clearer sense of each administrative unit's appropriate role in the management of the school, changes in personnel at any level can lead to changes in role interpretation—as was the case when there were changes in personnel for several leadership positions during the 2018-19 school year.

Finally, and though there is not yet enough data to state so with conviction, there was some indication after Year 1 that ISD schools may not require their own governance division or designation; most of what is expected of ISD schools possibly could be accomplished with support from pre-existing state school turnaround support structures.

### *Align Curriculum Requirements and Measurements of Success*

The practice of letting schools choose a curriculum but then evaluating them using state measurements will not always allow for accurate measurement of the success of each school. If ISD schools are to be evaluated on their ability to meet specific state academic standards and objectives, then Operators should be required to propose curricula that address those standards and objectives; however, if the interpretation of each Operator's flexibility continues to include the flexibility to choose curricula, then some consideration should be given to identifying measurements that best reflect those curricula for each school.

### *Set Realistic Expectations for Indicators of Success in the Early Stages of School Conversion*

Individuals at each leadership level learned during the inaugural school year that embedded, historical challenges at an ISD school often cannot be overcome in a single year. In addition (and as reflected in the Logic Model developed by the evaluation team before the start of the initiative; [Appendix D](#)), a focus on changes in test scores may lead implementers and observers alike to overlook early successes in less easily measurable but equally important formative areas (such as community perceptions of changes in school quality). Finally, while most of the legislated improvement targets appear to be appropriate (e.g., the expectation that ISD schools “exceed the average annual percentage growth of other qualifying schools”), the expectations related to the time and resources necessary to reach them (e.g., exceeding the average growth

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<sup>15</sup> Some of the provisions in House Bill 798 and Senate Bill 522 may address some (but not all) of the issues highlighted in this section.

of those schools for at least three consecutive years during the Operator's initial five-year contract<sup>16</sup>) may not be as appropriate.

### *Require Operators to Propose and Pursue Bold and Comprehensive Changes*

The changes introduced at Southside Ashpole for Year 1 (extending the school day, introducing a new curriculum, requiring uniforms) were notable and noticeable, but it is not yet clear whether in the long run they collectively will be sufficient enough to address the school's deepest and most persistent challenges. As noted earlier, the process of school reform takes time, but whether the pace of change at Southside Ashpole will continue (or increase), or whether changes will be limited to those introduced in the first year remains to be seen. As demonstrated by several of the other school renewal initiatives across the state in 2018-19 (such as the Laboratory Schools and the planning work for the School Renewal District), there are opportunities for expanding the changes introduced at Southside Ashpole in Year 1 and for more comprehensively reimagining how the school could operate. Given the very real challenges at Southside Ashpole and the other ISD-eligible schools, significant gains—whether academic, social, or otherwise—may depend more on the boldness and depth of the fully-realized renewal plans introduced than on the quick resolution of day-to-day challenges that sometimes distract schools from focusing on longer-term goals.

### *Require Operators to Prepare Annual School-Level Reports*

One of the original goals of the ISD was for its schools to be places for experimentation and learning about what works best for each targeted student population. In order to capture these unique policies and practices, and for sharing this information more broadly, the evaluation team recommended in its original evaluation plan that the ISD require each participating school and its Operator to submit an annual report. The first-year operational challenges and initial student performance outcomes at Southside Ashpole make the need for such a report even greater; without such reports, ISD schools will continue to rely solely on data collected by the evaluation team to contextualize their outcomes for each academic year. The evaluation team recommends that these reports include information about implementation strategies, challenges, and successes, as well as anything else an individual school may opt to include.

**Appendix J** outlines specific components to consider for inclusion in the School-level Annual Report, aligned to the evaluation questions.

### *Increase Pre-Opening Planning Time*

The initiative's annual timeline likely will be an ongoing challenge until it is extended in one or more areas. For example, Year 1 implementation at Southside Ashpole would have benefitted from a longer planning time (e.g., a full planning year before re-opening), as well as advance time to recruit and hire the staff necessary to meet the challenges of a low-performing school.

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<sup>16</sup> **§ 115C-75.12. Term of supervision for an innovative school**

([https://www.ncleg.gov/EnactedLegislation/Statutes/PDF/BySection/Chapter\\_115C/GS\\_115C-75.12.pdf](https://www.ncleg.gov/EnactedLegislation/Statutes/PDF/BySection/Chapter_115C/GS_115C-75.12.pdf))

Similarly, the current school selection timeline (by October 15 each year<sup>17</sup>) does not allow for review of critical current-year data as part of the selection process.<sup>18</sup>

### *Seek Staff and Partners with Credible Connections to Each ISD School Community*

Some consideration should be given to identifying people and organizations to work in ISD settings who bring at least one connecting experience to the work (e.g., previous work in low-performing schools or previous work in the impacted community).<sup>19</sup> One administrator posited that no one, including the original ISD superintendent, had full knowledge of all of the things that needed to be done in order to run the ISD; learning the ins and outs of not only running but essentially creating a new district required first experiencing and then finding the time to address each challenge as it arose.

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<sup>17</sup> **§ 115C-75.7. Selection of innovative schools**

([https://www.ncleg.gov/EnactedLegislation/Statutes/PDF/BySection/Chapter\\_115C/GS\\_115C-75.7.pdf](https://www.ncleg.gov/EnactedLegislation/Statutes/PDF/BySection/Chapter_115C/GS_115C-75.7.pdf))

<sup>18</sup> This timeline (along with other operations factors) is addressed in House Bill 798 and Senate Bill 522.

<sup>19</sup> One interviewee noted that, without a local connection, his ISD role sometimes felt like trying to lead in a foreign land.

## Limitations and Next Steps

### *Limitations to Qualitative Analyses*

With only one school and one year of implementation data on hand, rigorous quantitative analyses of the ISD are not yet possible. **Appendix F** outlines the quantitative approach that will be taken for future reports (should additional schools join the ISD), as well as the limitations associated with the procedures described.

In the meantime, the surveys, interviews, and focus groups conducted during the 2018-19 school year provided valuable information about Southside-Ashpole that could not be captured by quantitative measures. However, three factors limit the conclusions that can be drawn from these sources:

- Potential differences between student and parent survey respondents and non-respondents;
- The small number of teachers and administrators; and
- The lack of multi-year data, including historical data.

### *Differences in Student and Parent Survey Respondents and Non-Respondents*

With only a single, small school in the ISD for the 2018-19 school year, there were few students and parents available to answer surveys. Only 17 parents, representing 23 of Southside-Ashpole's approximately 200 students, chose to take the survey. It is possible that this group of parents is not representative of all Southside Ashpole parents (e.g., perhaps these parents are more involved in their children's school lives); therefore, their survey responses may not reflect the broader opinions of all Southside Ashpole parents. Likewise, only 46 students in 3<sup>rd</sup>, 4<sup>th</sup>, and 5<sup>th</sup> grade received the necessary parent permission to take the student survey *and* were in school on the day when the survey was administered. Again, these students may not be representative of the entire student body for a number of different reasons.

### *Small Size of Teacher, Administrator Samples*

Similar to the first issue, there were only a few teachers and administrators to speak to about the ISD. Although almost every teacher and administrator was interviewed and/or surveyed for this report, they collectively represent a limited number of voices.

### *Lack of Multi-Year Data*

Unlike the quantitative data in the report, which is standard data routinely collected by the state each year, most of the qualitative data was collected exclusively for the ISD evaluation. With only one year of collection so far, no changes over time are identifiable yet. This limitation is compounded by the fact that very few of the teachers and administrators involved with the

ISD were sufficiently familiar with Southside Ashpole prior to the ISD to be able to comment about changes since the school's conversion.

***Next Steps: School Year 2019-20 Data Collection and Analyses***

The ISD originally was scheduled to incorporate new schools for the 2019-20 school year, but as of this writing only the original school continues to be served. Unless changes are proposed by the ISD and negotiated as part of a revised Scope of Work, the evaluation team will continue to collect qualitative and quantitative data on implementation and outcomes at the current ISD school. These data will be used to estimate possible trends as part of the next annual report (due Fall 2020).

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## Appendix A: Evaluation Outcomes Required by the Enacting Legislation

The enacting legislation is Session Law 2016-110 (House Bill 1080),<sup>20</sup> which created North Carolina General Statute §115C-75 (Article 7A).<sup>21</sup> Outcome measures below were identified in §115C-75.11 and §115C-75.12.

1. School academic growth, performance scores and grades
  - a. School overall performance score (target: C or better)
  - b. School-level overall growth score (annual)
  - c. School-level annual percentage growth (year-to-year)
  - d. School-level overall performance scores (ISD vs comparison schools)
  - e. School-level overall growth scores (ISD vs comparison schools)<sup>22</sup>
  - f. School-level mathematics performance and growth by subject area (ISD vs comparison schools)
  - g. School-level reading performance and growth by subject area (ISD vs comparison schools)
2. Schools establish a safe and positive learning environment
  - a. Proportion of students who feel safe at school
  - b. Proportion of students with positive perceptions of learning environment
  - c. Proportion of staff who feel safe at school
  - d. Proportion of staff indicating positive impressions on related Teacher Working Conditions Survey items
  - e. Proportion of parents who feel school is safe
  - f. Proportion of parents who feel that the school is responsive to their concerns
3. Community engagement grows in ways that are attributable to the ISD
  - a. Description of the process of identifying valuable external partners
  - b. Annual list of partners and description of services they provide, including level of partnerships (time commitment, financial commitment)
4. Parent engagement grows in ways that are attributable to the ISD
  - a. Description of the process of identifying valuable external partners

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<sup>20</sup> <https://www.ncleg.net/Sessions/2015/Bills/House/PDF/H1080v6.pdf>

<sup>21</sup> [https://www.ncleg.net/EnactedLegislation/Statutes/HTML/ByArticle/Chapter\\_115C/Article\\_7A.html](https://www.ncleg.net/EnactedLegislation/Statutes/HTML/ByArticle/Chapter_115C/Article_7A.html)

<sup>22</sup> Note: Legislatively-mandated target: exceeds average growth of all other qualifying schools

- b. Parent perceptions of the school academic expectations and standards
  - c. Parent perceptions of connections between student engagement and academic outcomes
  - d. Parent perceptions of their own participation in academic life of their students
- 5. ISD school staff feelings of empowerment grow in ways that are attributable to the ISD school-community engagement efforts
  - a. Staff perceptions of empowerment
  - b. Parent perceptions of empowerment
- 6. ISD school creates an effective structure for holding staff accountable
  - a. ISO protocol for teacher evaluation
  - b. Staff perceptions of staff accountability process
- 7. ISD schools exhibit fiscal efficiency and effectiveness
  - a. Annual school operating costs, compared to average operating costs for similarly-sized new schools and/or new charter schools

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## Appendix B: Initially Identified Schools, 2017-2019

School District	School	Decision Year			
		2017	2017 Notes	2018	2018 Notes
Alamance-Burlington Schools	Hillcrest Elementary	•		•	<i>Finalist</i>
	Harvey R Newlin Elementary	•			
Anson County Schools	Wadesboro Elementary				•
	Wadesboro Primary	•			
Buncombe County Schools	Johnston Elementary				•
Charlotte-Mecklenburg Schools	Renaissance West STEAM Academy			•	
	Walter G Byers School	•			
	Bruns Academy	•	<i>Dropped fm consideration; fed aid</i>		
Cumberland County Schools	Teresa C Berrien Elementary				•
Duplin County Schools	Wallace Elementary	•			
Durham Public Schools	Eno Valley Elementary	•		•	
	Fayetteville Street Elementary	•			
	Eastway Elementary	•	<i>Dropped fm consideration; fed aid</i>		
	Glenn Elementary	•	<i>Finalist</i>		
	Lakewood Elementary	•	<i>Finalist</i>		
Edgecombe County Public Schools	Stocks Elementary	•		•	•
Guilford County Schools	Ceasar Cone Elementary	•			
	Gillespie Park Elementary	•			
	Vandalia Elementary			•	
	Washington Elementary	•			
	Fairview Elementary			•	<i>Finalist</i>
Harnett County Schools	Wayne Avenue Elementary				•
Hertford County Schools	Ahoskie Elementary	•			
	Riverview Elementary	•			



School District	School	Decision Year			
		2017	2017 Notes	2018	2018 Notes
Johnston County Schools	Selma Middle School	•			
Lenoir County Schools	Northeast Elementary	•			
Martin County Schools	East End Elementary	•			
	Edna Andrews Elementary	•			
	South Creek Elementary				•
Nash Rocky Mount Schools	Williford Elementary	•	<i>Finalist</i>	•	<i>Finalist</i>
New Hanover County Schools	A H Snipes Academy of Arts & Design	•			
Northampton County Schools	Gaston Middle	•		•	<i>Finalist</i>
	Willis Hare Elementary	•	<i>Finalist</i>		
Pitt County Schools	Grifton	•			
	South Greenville Elementary	•			
Robeson County Schools	Orrum Middle	•			
	Rosenwald Elementary	•			
	Townsend Middle	•			
	R B Dean Elementary	•	<i>Finalist</i>		
	Southside Ashepole Elementary	•	<b><i>Selected</i></b>		
Thomasville City Schools	Liberty Drive Elementary	•			
Union County Schools	Walter Bickett Elementary	•			
Wayne County Schools	Brogden Middle	•	<i>Dropped fm consideration; fed aid</i>	•	•
	Brodgen Primary	•			
	Eastern Wayne Elementary	•			
	Carver Heights Elementary	•	<i>Dropped fm consideration; fed aid</i>	•	<b><i>Selected; de-selected by NCGA</i></b>
Wilson County Schools	BO Barnes Elementary				•
	Margaret Hearne Elementary	•			•
	Vick Elementary	•	<i>Dropped fm consideration; fed aid</i>		

School District	School	Decision Year			
		2017	2017 Notes	2018	2018 Notes
Winston-Salem Forsyth County Schools	Ashley Academy			•	
	Diggs-Latham Elementary	•			
	Forest Park Elementary	•		•	
	Gibson Elementary	•			
	Ibrahim Elementary				•
	Kimberly Park Elementary			•	
	Middle Fork Elementary	•			
	North Hills Elementary	•			
	Old Town Elementary	•			•
	Ashley Academy	•	<i>Dropped fm consideration; fed aid</i>		
	Hall-Woodward Elementary			•	<i>Finalist</i>
	Kimberly Park Elementary	•	<i>Dropped fm consideration; fed aid</i>		

## Appendix C: Summary of Relevant Pending Legislation

### *Proposed Changes to ISD Legislation in H798 v2<sup>23</sup>*

House Bill 798 (2019-2020 Session) proposes several changes to the existing ISD legislation.

#### *Summary of Major Changes*

- The criteria for inclusion in the ISD are revised: The requirement that ISD schools be elementary schools is eliminated (i.e., middle and high schools also would be eligible).
- The process for selecting an innovative school is updated: Schools would go through a three-year process from the time of qualification to selection for the ISD, with multiple mandated public hearings during that period. The ISD Superintendent would be required to help qualifying schools make improvements (and thus no longer be eligible for consideration) during that time.
- The management options for innovative schools are expanded: Selected schools would now get *either* an IS operator *or an IS consultant* (determined by the State Board of Education [SBE]); if they receive the latter, the school would continue to be operated by the LEA and it must meet requirements established by the ISD and the consultant.
- The responsibility for certain decisions is shifted: IS operators would be required to work *in collaboration with* (rather than independently or in consultation with) the ISD Superintendent on several major decisions, including the hiring and firing of principals.

#### *Additional Details*

The legislation amends the criteria for qualification so that schools meeting at least one of the following will begin the evaluation process:

- Title I school in the lowest 5% of all Title I schools;
- School serving students in grades 9-12 that failed to graduate a third or more of students; or
- School identified by the SBE as “being in need of comprehensive support and improvement” due to at least one underperforming subgroup.

The evaluation process (currently called the selection process) becomes a three-year period during which schools are evaluated and the public is updated annually:

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<sup>23</sup> <https://www.ncleg.gov/BillLookup/2019/H798>

- In the first year after a school has been identified as qualifying, the school will be placed on the ISD **qualifying** list; the ISD Superintendent will hold a public hearing for parents, school employees, and community members.
- If a school on the qualifying list in the prior year remains a qualifying school in the next year, the school will be placed on the ISD **watch** list; the local Board of Education will hold a public hearing.
- If a school on the watch list in the prior year remains a qualifying school in the next year, the school will be placed on the ISD **warning** list. The local Board of Education will hold a public hearing and present at a local public county commissioners meeting.
- If a school on the warning list remains a qualifying school in the next year, and is one of the lowest five qualifying schools on the warning list, the school will be selected by the SBE as an innovative school, beginning the next year.

The proposed legislation removes the requirements that the ISD Superintendent is responsible for recommending schools for inclusion in the ISD, that the selected schools each year represent geographic diversity, and that there is no more than one school per LEA selected each year.

The SBE will ensure that schools on any list are “engaged in strategies . . . for comprehensive support and improvement.” The ISD Superintendent will assist local Boards of Education in “identifying funding, strategies, and partners for the comprehensive support and improvement efforts.”

The SBE can select either an IS operator or an IS consultant to manage the innovative school. The Department of Public Instruction can be selected as an operator, but the ISD itself cannot. If the school is assigned an IS consultant, the school will continue to be operated by the LEA, but it will be obligated to meet requirements set by the ISD Superintendent and the consultant for a minimum of five years; if it fails to meet the requirements, it will be assigned an IS operator by the SBE.

IS operators must work in collaboration with the ISD Superintendent—not independently or in consultation with the ISD Superintendent—to make decisions about: a) hiring and removing the school’s principal; and b) entering into MOUs with the local Board of Education to address facility and capital expenditures, transportation, and services for children with disabilities.

#### *Proposed Changes to ISD Legislation in S522 v6<sup>24</sup>*

#### *Significant Differences between H798 and S522*

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<sup>24</sup> <https://www.ncleg.gov/BillLookup/2019/S522>

House Bill 798 and Senate Bill 522 are similar in many ways; however, there are a few notable differences:

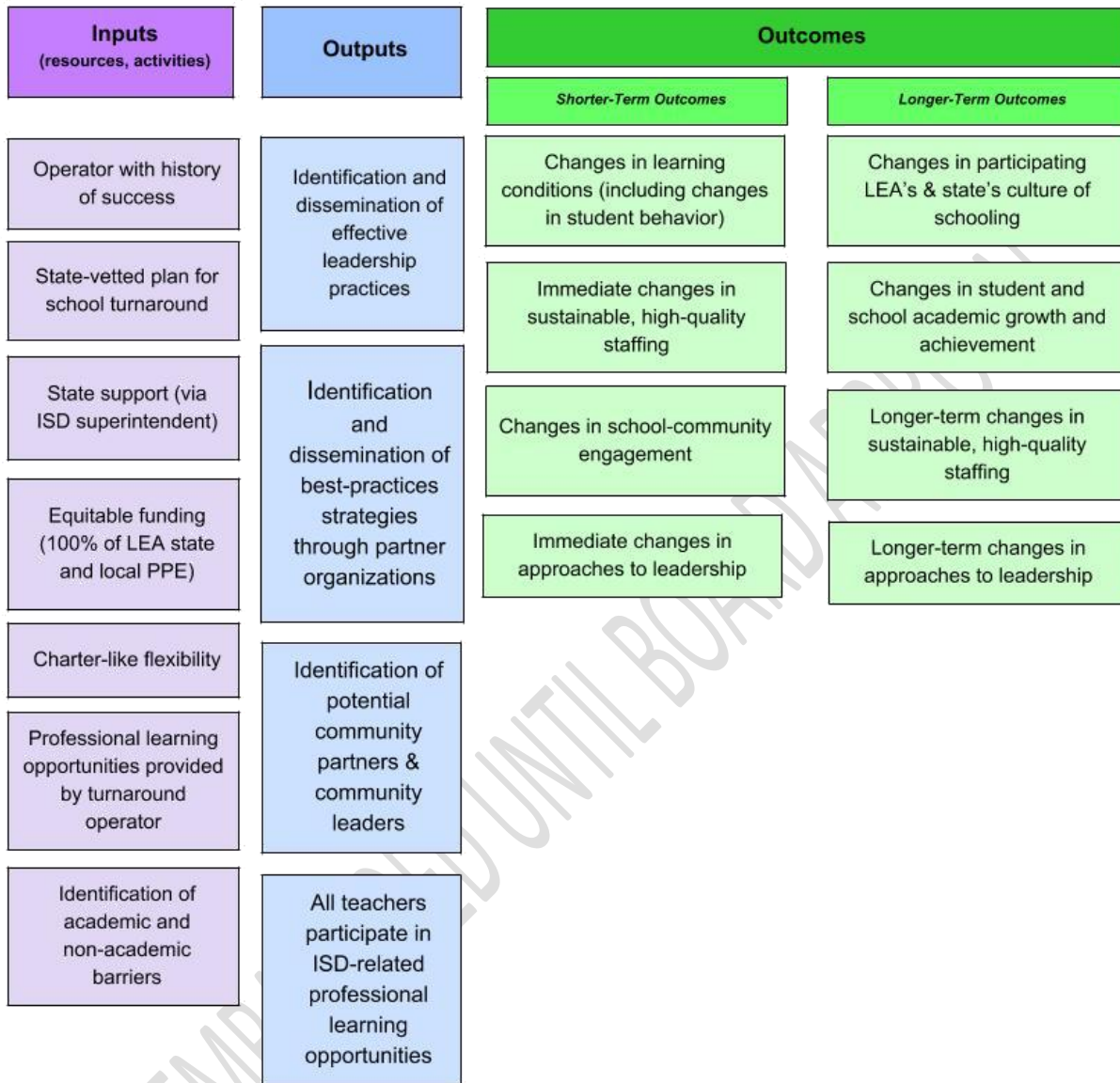
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## Appendix D: Original Logic Model



## Appendix E: Crosswalk: Evaluation Questions, Measurable Outcomes, Indicators, and Data Sources

Evaluation Question	Measurable Outcome	Indicator(s)	Data Source(s)
<b>Q1:</b> Does the ISD improve <i>student- and school-level academic growth and achievement</i> ?	ISD schools achieve and maintain performance scores at or above a C	School overall performance score (target: C or better) <i>(Note: Overall combined measure of achievement and growth)</i>	North Carolina administrative data
	ISD students demonstrate academic proficiency	Student cohort proficiency, by grade, subject area, and sub-group	North Carolina administrative data
	ISD schools demonstrate academic growth	School-level overall growth score (annual) School-level annual percentage growth (year-to-year)	North Carolina administrative data
	ISD schools' academic outcomes compare favorably to eligible but non-identified schools	School-level overall performance scores (ISD vs comparison schools) School-level overall growth scores (ISD vs comparison schools) <i>(Note: Legislatively-mandated target: exceeds average growth of all other qualifying schools)</i> School-level mathematics performance and growth by grade and sub-group (ISD vs comparison schools) School-level reading performance and growth by grade and sub-group (ISD vs comparison schools)	North Carolina Report Card data
	ISD students exhibit more growth than students at matched a) local schools (possibly including I-Zone schools), b) transformational schools (e.g., Restart schools), and c) considered but non-selected schools; also vs statewide growth averages	Student cohort growth score, by grade, subject area, and sub-group	North Carolina administrative data

**Key:** *Red text*= measurable outcome for evaluation elements highlighted in enacting legislation; **ST**=Short term outcome (1-3 years); **LT**=Long term outcome (4+ years)



Evaluation Question	Measurable Outcome	Indicator(s)	Data Source(s)
Q2. Does the ISD improve <b>learning conditions</b> , including changes in student behavior?	ISD student support services (Exceptional Children services, etc.) meet statutory requirements	<p>Description of EC plan (outlining the full continuum of services to meet the special education and related services needs of students with disabilities)</p> <p>Proof of a highly-qualified and licensed special education teacher(s) and/or director</p> <p>Identification of sources for external EC service providers (e.g., school psychologist, occupational therapist, physical therapist, speech language pathologist, audiologist, etc.)</p> <p>Evidence of on-site/accessible, appropriate instructional supports for students with disabilities (as indicated in IEPs)</p> <p>Statement of school policies for EC, incorporating all required elements to meet <a href="#">Federal</a> and <a href="#">State</a> regulations (e.g., discipline, confidentiality, accountability, maintenance of effort, security and confidentiality of EC Student Special Education files, etc.)</p> <p>Address transportation (as a related service) for EC students who may have this as a component of their IEP</p>	Annual school report
	ISD schools establish a safe and positive learning environment	<p><b>Safe</b></p> <p>Proportion of students who feel safe at school</p> <p><b>Positive</b></p> <p>Proportion of students with positive perceptions of learning environment</p>	Student survey
		<p><b>Safe</b></p> <p>Proportion of staff who feel safe at school</p> <p><b>Positive</b></p> <p>Proportion of staff indicating positive impressions on related Teacher Working Conditions Survey items</p>	NC Teacher Working Conditions Survey
		<p><b>Safe</b></p> <p>Proportion of parents who perceive that school is safe</p> <p><b>Positive</b></p> <p>Proportion of parents who feel that the school is responsive to their concerns</p>	Parent survey

**Key:** **Red text**= measurable outcome for evaluation elements highlighted in enacting legislation; **ST**=Short term outcome (1-3 years); **LT**=Long term outcome (4+ years)

Evaluation Question	Measurable Outcome	Indicator(s)	Data Source(s)
<b>Q2 (cont.).</b> Does the ISD improve <b>learning conditions</b> , including changes in student behavior?	<i>ISD schools experience reduction of behavioral referrals</i>	Description of school's approach to discipline and changes over time	School-level annual report
		Counts of disciplinary infractions and suspensions, by demographic group, including changes over time Counts of disciplinary infractions and suspensions, relative to previous/feeder school	North Carolina administrative data
	<i>ISD schools experience reduction of student absenteeism and/or increased attendance</i>	Description of school's responses to attendance problems/truancy	School-level annual report
		Daily attendance rate and count of chronically absent students, including changes over time Daily attendance rate and count of chronically absent students, relative to previous/feeder school	North Carolina administrative data
<b>Q3.</b> Does the ISD contribute to <b>changes in school-community engagement</b> ?	<b>Community engagement grows in ways that are attributable to the ISD</b> <ul style="list-style-type: none"> <li>Formal relationships are established between ISD schools and community representatives</li> <li>In-kind supports and services provided to ISD schools change in positive ways</li> </ul>	Description of the process of identifying valuable external partners Annual list of partners and description of services they provide, including level of partnerships (time commitment, financial commitment)  <i>If evaluation budget supports:</i> Descriptive report of offsetting services or additional value in services provided; where available, budget data on any financial offsets arising from partnerships	School-level annual report
	<b>Parent engagement grows in ways that are attributable to the ISD</b>	Annual list of parent/guardian involvement in school events	School-level annual report

**Key:** **Red text**= measurable outcome for evaluation elements highlighted in enacting legislation; **ST**=Short term outcome (1-3 years); **LT**=Long term outcome (4+ years)

Evaluation Question	Measurable Outcome	Indicator(s)	Data Source(s)
<b>Q3 (cont.).</b> Does the ISD contribute to <i>changes in school-community engagement</i> ?	<ul style="list-style-type: none"> <li>ISD parents/guardians understand academic expectations and standards</li> <li>ISD parents/guardians understand connections between student engagement and academic outcomes</li> <li>ISD parents/guardians participate more frequently in the life of the school</li> <li>ISD parents/guardians participate in the academic life of their own students</li> </ul>	Parent perceptions of the school academic expectations and standards  Parent perceptions of connections between student engagement and academic outcomes  Parent perceptions of their own participation in academic life of their students	Parent survey
	ISD school staff and community member <i>feelings of empowerment grow in ways that are attributable to the ISD school-community engagement efforts</i>	Staff perceptions of empowerment	Practitioner survey Practitioner focus group
		Parent perceptions of empowerment	Parent survey
<b>Q4.</b> Does the ISD contribute to <i>changes in the culture of schooling</i> both in and outside of the ISD?			
<b>Q4a.</b> Does the ISD contribute to an overall change in the <i>culture of schooling in ISD schools</i> ?	<i>ISOs lead diffusion of best practices across ISD schools</i>	Plan for diffusion of best practices	School-level annual report
		Staff perceptions of ISO-provided guidance for implementation of best practices	Practitioner survey
<b>Q4b.</b> Does the ISD change <i>approaches to ensuring sustainable, high quality staffing in ISD schools</i> ?	<i>The ISD implements process to build a local, sustainable teacher workforce pipeline (LT)</i>	Description of teacher recruitment and retention processes	School-level annual report
	ISD schools recruit effective staff (LT)	State teacher evaluation data Teacher absentee rates, including chronic absentee episodes and changes over time	North Carolina administrative data (NCEES)

**Key:** *Red text*= measurable outcome for evaluation elements highlighted in enacting legislation; *ST*=Short term outcome (1-3 years); *LT*=Long term outcome (4+ years)

Evaluation Question	Measurable Outcome	Indicator(s)	Data Source(s)
<b>Q4b (cont.).</b> Does the ISD change <b>approaches to ensuring sustainable, high quality staffing in ISD schools?</b>	ISD schools retain effective staff (LT)	Staff turnover rate, including changes over time Staff turnover rates (ISD vs comparison schools)	North Carolina administrative data
	ISD school creates an effective structure for holding staff accountable (ST)	ISO protocol for teacher evaluation	School-level annual report
		Staff perceptions of staff accountability process (Note: Accountability default: state evaluation process)	Practitioner survey Practitioner focus group
	The ISD promotes a culture of professional learning among teachers (ST)	Annual list of professional development opportunities (plus attendance figures)	School-level annual reports
		Staff perceptions of school-level culture of professional learning	Practitioner surveys Practitioner focus group
<b>Q4c.</b> Does the ISD change <b>approaches to leadership in ISD schools?</b>	ISD schools are led by effective school administrators (ST)	(ISD to define in partnership with the evaluator effective leadership and related measurement; default: North Carolina administrator evaluation tool)	North Carolina administrative data (NC administrator evaluation data)
		Parent perceptions of school administration leadership	Parent Survey
		Staff perceptions of school administration leadership	Practitioner survey Practitioner focus group
	ISD schools adopt effective leadership strategies (ST)	(ISD to define in partnership with the evaluator; see above)	School-level annual report
		(ISD to define in partnership with the evaluator; see above)	Practitioner survey Practitioner focus group
		(ISD to define in partnership with the evaluator; see above)	Parent Survey
	ISD schools exhibit fiscal efficiency and effectiveness (ST)	Annual school operating costs, compared to average operating costs for similarly-sized new schools and/or new charter schools	North Carolina administrative data School-level annual report (annual budget report)
	ISD schools establish a diffused leadership model that includes teacher leadership (LT)	Description of teacher leadership model	School-level annual report
		Evidence of teacher leadership model implementation	
		Staff perception of the teacher leadership model	Practitioner survey Practitioner focus group

**Key:** **Red text**= measurable outcome for evaluation elements highlighted in enacting legislation; **ST**=Short term outcome (1-3 years); **LT**=Long term outcome (4+ years)

Evaluation Question	Measurable Outcome	Indicator(s)	Data Source(s)
<b>Q4d. Does the ISD contribute to changes in the culture of schooling in partnering LEAs, non-participating LEAs, and/or across the State overall?</b>	<i>ISD leadership encourage diffusion and replication of strategies identified as effective practices to partnering LEAs</i>	Plan for diffusion of best practices to partner LEAs	School-level annual report
		Actions taken by partner LEAs that are attributable to ISD efforts	Interviews with neighboring LEA staff/superintendents
	<i>Non-participating LEAs demonstrate leadership-level changes in approaches to school leadership</i>	Actions taken by non-partnering but originally eligible schools (principals) reflect best practices identified by the ISD Actions taken by non-partnering but originally eligible LEAs (superintendents and local school boards) reflect best practices identified by the ISD	Document/policy scan of the eligible but non-participating schools/LEAs

**Note on pre-intervention data:** When possible, use 2016-17 data for pre-intervention data baseline, since these are the data upon which Ashpole was selected; similar logic for data upon which next cohort of schools were selected.

**Key:** **Red text**= measurable outcome for evaluation elements highlighted in enacting legislation; **ST**=Short term outcome (1-3 years); **LT**=Long term outcome (4+ years)

## Appendix F: Comparison School Analysis Procedure

Given the quantitative analysis limitations described in the main body of this report and limits imposed by the evaluation budget, the evaluation development team hosted a quantitative analysis summit in April 2018 with independent experts to discuss reasonable quantitative options for this evaluation. Based on that consultation, the evaluation development team proposed the following recommendations for the quantitative analysis component of the evaluation; the evaluation team elected to follow these recommendations.

### *Comparative Interrupted Time Series*

Because of such limiting factors as the small size of the ISD initiative, summit participants recommended an ***interrupted time series*** design for the final quantitative analyses. To prepare for this analysis, the evaluator collected multiple quantitative indicators for every school in the state for the four years before the first school was transferred into the ISD. In addition, the evaluator collected the same indicators for the first year of operation of the first school and will continue to collect these same indicators through the end of the evaluation. Eventually (once a school has been in ISD for at least two but preferably three years), the main analyses will examine whether there were any changes in trend lines for the key student and teacher outcomes after ISD inclusion. To strengthen this design, the evaluator will include comparison groups, making it a ***comparative interrupted time series***.

Because the interrupted time series analysis relies on analyzing changes over time, the evaluation team initially will conduct ***difference-in-differences*** analyses (which, though not as compelling in terms of their ability to model changes over time, do allow for single-year analyses) for the first two outcome years (the Baseline and Growth years).

### *Comparison Schools*

The summit participants identified four potential groups from which comparison schools could be selected. As noted in the [North Carolina Administrative Data](#) section, above, the first includes the next-in-line schools that were announced publicly as being eligible for ISD inclusion, but ultimately were not selected ([Appendix B](#)). The second group includes schools that were not eligible for ISD inclusion but are similar to the schools selected for the ISD on multiple relevant measures ([Appendix G](#)). The third group includes other schools from the ISD school's original LEA, when such comparisons are relevant. The final potential comparison group includes any schools selected for an I-Zone within the participating LEA. The analyses included in the first reports for this evaluation use the first two groups only (the original school district of the first participating school opted not to petition to run other schools in an I-Zone). The full list of comparison schools is included in Table F1 (following page), but the identity of the two statistically-masked comparison schools has been masked.

Table F1. Historical Academic Outcomes Data for Inaugural ISD School and Comparison Schools

ID	Name	LEA	2014-15		2015-16		2016-17		2017-18		2018-19		2014-15		2015-16		2016-17		2017-18		2018-19	
ISD Schools																						
780408	Southside Ashpole Elementary	Robeson	F	36	F	35	F	27	F	29	F	30	29.4	23.6	18.4	20	20.5	NotMet	Met	NotMet	NotMet	NotMet
Statistically-Matched Elementary Schools																						
340368	Matched School A	LEA A	F	29	F	33	F	33	F	39	F	36	17.5	20.7	22.1	28.8	26.6	Met	Met	Met	Met	Met
800346	Matched School B	LEA B	F	36	D	40	F	29	F	25	F	26	31	34.5	22.2	18.1	17.1	NotMet	NotMet	NotMet	NotMet	NotMet
ISD Finalist Schools																						
320320	Glenn Elementary	Durham	F	39	F	36	F	37	D	50	D	42	29.4	30	32.3	41	35.4	Met	NotMet	NotMet	Met	NotMet
320339	Lakewood Elementary	Durham	F	38	F	35	F	35	F	37	C	55	29.5	26.9	28.2	28.8	46.1	Met	NotMet	NotMet	Met	Exceeded
640396	Williford Elementary <sup>25</sup>	Nash Rocky Mount	D	41	F	37	F	26	F	30	F	34	31	27.4	19	19.6	*	Met	Met	NotMet	NotMet	*
660360	Willis Hare Elementary	Northampton	D	49	D	48	F	36	D	51	D	49	44.5	43.1	31.1	43.8	41.6	NotMet	NotMet	NotMet	Met	Met
780390	R B Dean Elementary <sup>26</sup>	Robeson	F	34	F	36	F	36	D	40	D	43	23.1	29.3	29.5	29.4	33.9	Met	NotMet	NotMet	Met	Met
Other Elementary Schools on ISD Selection List																						
10354	Harvey R Newlin Elementary	Alamance-Burlington	D	40	D	42	F	37	D	42	D	43	28.8	32	30.7	34.8	34.5	Met	Met	NotMet	Met	Met
10358	Hillcrest Elementary	Alamance-Burlington	D	50	D	47	F	34	F	34	D	42	41.7	40.6	29.8	28	34.9	Met	Met	NotMet	NotMet	Met
40330	Wadesboro Primary	Anson	F	36	F	39	D	43	D	40	F	37	26.3	28	33.2	29.3	29.1	Met	Met	Met	Met	NotMet
292316	Liberty Drive Elementary	Thomasville City	D	52	D	53	D	42	D	47	D	41	47.3	48.5	38.6	38.7	36.7	Met	Met	NotMet	Met	NotMet
310388	Wallace Elementary	Duplin	D	49	D	47	D	41	D	52	D	47	44.1	43.6	35.8	42.3	42.3	NotMet	NotMet	NotMet	Exceeded	NotMet
320315	Eno Valley Elementary	Durham	F	37	F	37	F	36	F	38	D	50	27.9	29.8	25.5	29.4	40.7	Met	NotMet	Met	Met	Exceeded
320344	Fayetteville Street Elementary	Durham	D	43	D	44	F	38	D	46	D	40	33.1	36.6	32.4	37.6	30.1	Met	Met	NotMet	Met	Met
330354	Stocks Elementary	Edgecombe	F	30	F	33	F	32	F	34	F	37	21.8	23.8	20.5	23	28.4	NotMet	NotMet	Met	Met	NotMet
340376	Forest Park Elementary	Winston-Salem Forsyth	D	40	F	32	F	29	F	33	D	41	34	26.6	17.2	23.5	29.7	NotMet	NotMet	Met	Met	Met
340380	Gibson Elementary	Winston-Salem Forsyth	F	37	F	30	F	35	D	45	D	54	28.4	24.7	24.8	34.6	44.8	Met	NotMet	Met	Met	Exceeded
340430	Diggs-Latham Elementary	Winston-Salem Forsyth	F	36	D	44	F	39	D	41	D	43	29.9	38.2	33.6	36.9	36.9	NotMet	NotMet	NotMet	NotMet	NotMet
340447	Middle Fork Elementary <sup>27</sup>	Winston-Salem Forsyth	F	33	F	31	F	34	F	30	D	40	27.1	23.5	22.9	22.1	28.9	NotMet	NotMet	Met	NotMet	Met
340462	North Hills Elementary	Winston-Salem Forsyth	D	42	D	49	F	37	F	39	D	48	33.2	41.8	31	33.8	37.7	Met	Met	NotMet	NotMet	Exceeded
340476	Old Town Elementary	Winston-Salem Forsyth	D	43	D	49	D	42	D	43	F	39	39	42	37.5	37.8	34.7	NotMet	Met	NotMet	NotMet	NotMet
410349	Ceasar Cone Elementary	Guilford	F	33	F	36	F	34	F	39	F	36	21.8	27.2	25.3	29.4	29.1	Met	NotMet	NotMet	Met	NotMet
410385	Gillespie Park Elementary	Guilford	F	29	F	37	F	33	D	43	D	40	21.8	26.5	24.6	31.3	32.1	NotMet	Met	NotMet	Exceeded	Met
410586	Washington Elementary	Guilford	F	38	D	41	D	41	F	39	D	44	30.8	31.8	32.1	28.5	32.7	NotMet	Met	Met	Met	Exceeded
460308	Ahoskie Elementary	Hertford	D	42	D	47	D	41	D	40	F	39	35.3	40.1	36.3	37.5	36.4	NotMet	Met	NotMet	NotMet	NotMet
460332	Riverview Elementary	Hertford	D	40	D	46	D	42	D	49	D	51	30.2	40.1	37	46.2	49.2	Met	Met	NotMet	NotMet	NotMet
540325	Northeast Elementary	Lenoir	F	34	D	40	D	42	D	47	D	42	25.7	32.9	31.8	39.1	33.8	NotMet	NotMet	Met	Met	Met
580316	East End Elementary <sup>28</sup>	Martin	F	33	F	37	D	40	D	48	F	39	25	26	30.5	40.2	33.1	NotMet	Met	Met	Met	NotMet
580320	Edna Andrews Elementary <sup>29</sup>	Martin	D	41	D	44	F	35	F	35			33.5	35.7	27.6	24.2		Met	Met	NotMet	Met	

<sup>25</sup> Reduced grade span from PK-5 to PK-2 (2018-19)  
<sup>26</sup> Merged with Townsend Middle School; grade span extended to PK-8 (2019-20)  
<sup>27</sup> Converted to Lab School (ID=34Z000; 2018-19)  
<sup>28</sup> Merged with Edna Andrews and changed name to South Creek (2018-19)  
<sup>29</sup> Merged with East End to become South Creek (2018-19)



ID	Name	LEA	2014-15		2015-16		2016-17		2017-18		2018-19	2014-15		2015-16		2016-17		2017-18		2018-19	2014-15	2015-16	2016-17	2017-18	2018-19
600574	Walter G Byers School	Charlotte-Mecklenburg	F	36	F	39	F	38	D	45	D	52	27.8	29.5	28.1	34.2	42.9	NotMet	Met	Met	Exceeded	Exceeded			
650384	A H Snipes Acad of Arts/Design	New Hanover	F	39	D	41	F	35	D	41	D	43	29.6	32.2	27.5	32.8	34.8	Met	Met	NotMet	Met	Met			
740352	Grifton	Pitt	D	42	D	46	F	34	D	46	D	54	31.7	37.1	28.5	34.8	46.8	Met	Met	NotMet	Exceeded	Met			
740390	South Greenville Elementary	Pitt	F	35	D	41	D	41	F	38	F	34	26.8	31.3	30.6	26.8	25	NotMet	Met	Met	Met	Met			
780394	Rosenwald Elementary	Robeson	F	33	F	28	F	35	D	45	D	43	23.8	19.3	25.3	34.8	32.7	Met	NotMet	Met	Exceeded	Met			
900370	Walter Bickett Elementary	Union	F	39	D	46	F	38	D	50	D	54	33.7	36.6	32.6	39.7	45.8	NotMet	Met	NotMet	Exceeded	Exceeded			
960314	Brodgen Primary	Wayne	F	38	D	48	D	42	D	42	D	48	29.3	38.9	35.6	34	37.4	Met	Met	NotMet	Met	Exceeded			
960329	Eastern Wayne Elementary	Wayne	D	46	D	48	D	41	D	48	D	49	36.8	39.7	36.3	38.9	42.4	Met	Met	NotMet	Met	Met			
980356	Margaret Hearne Elementary	Wilson	D	45	D	45	F	37	D	54	F	35	35.5	38.4	30	47	30.4	Met	Met	NotMet	Met	NotMet			
Other Robeson County Elementary Schools																									
780320	Deep Branch Elementary	Robeson	F	34	D	47	D	51	D	53	D	53	27.2	37.6	42.8	45.9	45.1	NotMet	Met	Met	Met	Met			
780322	East Robeson Elementary	Robeson	B	71	B	74	B	77	B	78	A	85	65.9	68.3	73.4	73.7	82.7	Exceeded	Exceeded	Exceeded	Exceeded	Exceeded			
780328	Green Grove Elementary	Robeson	C	58	C	61	C	55	C	64	C	66	52	57.1	49.1	59.8	62.9	Met	Met	Met	Met	Met			
780329	J C Hargrove Elementary <sup>30</sup>	Robeson	F	36	D	44	D	44	D	51	D	45	25.3	34.2	37.2	42.9	35.3	Met	Met	Met	Met	Met			
780340	Long Branch Elementary	Robeson	D	46	D	46	D	49	C	57	C	59	36.6	37.1	41.3	49.7	53.3	Met	Met	Met	Exceeded	Met			
780344	Magnolia Elementary	Robeson	F	35	F	37	D	43	D	44	C	59	26.9	29.1	35.3	36	49.3	NotMet	NotMet	Met	Met	Exceeded			
780356	Oxendine Elementary	Robeson	D	42	D	44	D	42	D	53	D	53	34	33.2	35	42.8	44.7	Met	Exceeded	Met	Exceeded	Exceeded			
780360	Parkton Elementary	Robeson	D	49	D	53	D	52	D	53	D	41	41	44.2	46.3	46	36.8	Met	Exceeded	Met	Met	NotMet			
780364	Pembroke Elementary	Robeson	D	42	D	52	D	45	D	51	D	53	35.5	41.8	38.6	42.9	47.3	NotMet	Exceeded	NotMet	Exceeded	Met			
780374	Peterson Elementary	Robeson	F	38	D	43	F	34	D	43	D	44	27.8	32.4	28.3	36.6	39	Met	Exceeded	NotMet	NotMet	NotMet			
780376	Piney Grove Elementary	Robeson	D	46	C	55	D	51	D	48	D	41	40.7	49.6	49	45.4	38.2	NotMet	Met	NotMet	NotMet	NotMet			
780384	Prospect Elementary	Robeson	D	49	D	48	D	48	D	53	C	59	42.4	44.2	43.8	45.6	51.4	Met	NotMet	NotMet	Met	Exceeded			
780392	Rex-Rennert Elementary	Robeson	D	43	F	34	F	35	D	40	D	40	30.7	24.6	25.6	27.5	28.4	Exceeded	Met	Met	Exceeded	Met			
780398	Rowland Norment Elementary	Robeson	D	51	C	64	C	58	C	60	C	61	43.5	58.3	50.8	54.4	56.1	Met	Exceeded	Exceeded	Met	Met			
780400	St Pauls Elementary	Robeson	D	45	D	46	D	47	D	49	D	41	32.5	35.2	37.6	40.2	35.9	Exceeded	Exceeded	Met	Met	NotMet			
780407	Tanglewood Elementary	Robeson	C	65	B	76	B	73	B	78	B	73	61.5	72.8	70.6	78	70.1	Met	Exceeded	Met	Met	Met			
780412	Union Chapel Elementary	Robeson	D	50	D	49	D	47	D	54	D	45	41.7	40.4	41.6	44.3	39.4	Exceeded	Met	NotMet	Exceeded	NotMet			
780416	Union Elementary	Robeson	C	57	D	52	D	54	C	59	C	59	48.2	47.7	46.3	50	51.8	Exceeded	Met	Met	Exceeded	Exceeded			
780417	W H Knuckles Elementary <sup>31</sup>	Robeson	F	36	F	37	F	38	D	44	D	45	24.7	27	27.9	34	36.1	Met	Met	Met	Exceeded	Met			

<sup>30</sup> Merged with W H Knuckles; reduced grade span from PK-4 to PK-3 (2019-20)

<sup>31</sup> Merged with J C Hargrave; reduced grade span from PK-4 to PK-3 (2019-20)

### *Limitations to Quantitative Analyses*

Per the enacting legislation, there is high demand for a defensible, quantitative assessment of the direct impact of the initiative on student and teacher outcomes. There are, however, at least four factors that significantly limit the strength of the quantitative analyses being conducted for this evaluation:

- The small number of schools included in the initiative;
- Potential differences across school governance in the ISD;
- The initiative timeline; and
- The likely lack of randomization of impacted students and educators.

### *Number of Schools*

The ISD selected only one school for the 2018-19 school year, and no schools will be brought into the ISD for the 2019-20 school year. Measures of changes in teacher behavior, teacher quality, and student outcomes are reportable (as we have begun to do in this report), but with teachers and students distributed across only a handful of schools by the third year of the program—and most in schools that will have been involved with ISD for only one year—results of the statistical analyses of these measures must be reviewed with extreme caution. The challenge is compounded by the second and third issues below.

### *Differences across ISD School Governance*

By statute, schools in the ISD can be governed by different ISOs, meaning that there are likely to be substantial differences in school-level goals and strategies, once more schools are brought into the ISD. If schools are operated in vastly different ways, combining data from multiple ISD schools in an attempt to conduct stronger analyses of impacts on larger groups of teachers and students may be advisable only for estimating the overall impact of the *presence of the policy*—not for estimating the impact of different implementations of the policy across sites.

### *Initiative Timeline*

At its heart, the ISD is about creating new school cultures. We know from studies of changes in even single school culture variables (for example, changes in principal leadership) that schools often experience a regression in outcomes for at least a year before even a highly successful program begins to show positive results.

### *Randomization*

The characteristics of students who attend ISD schools will differ across schools. Furthermore, the ISD does not determine student admission by some form of randomization (e.g., via lottery). Since randomization of admission is unlikely, direct comparisons of student and teacher outcomes are likely to be misleading as a result of the different motivations of students

and teachers who choose to learn or teach in ISD schools, both relative to one another and relative to traditional public schools. None of these factors prevents evaluators from determining meaningful and/or statistically significant correlations between program initiative factors and outcomes of interest, but it does prevent evaluators from identifying any causal links between program characteristics and student and educator outcomes.

EMBARGOED UNTIL BOARD APPROVAL

## Appendix G: Comparison Matching Procedures

### *School Matching and ITS*

An important key to a strong non-experimental analysis design is identification of a comparison group of non-impacted entities (in educational research, usually schools or individuals) that most closely resembles the group of impacted entities, to reduce what is known as selection bias. Selection bias occurs when the impacted entities take part in the intervention for one or more (often unseen) shared reasons that may themselves be the cause of differences between outcomes for that group and outcomes for the comparison group—not the cause of participation in the initiative being studied. In other words, “[d]ifferences in outcomes between the treatment and comparison group may be due to pre-existing or unobserved differences between the two groups, rather than to the effect of the program being evaluated” (Somers et al. 2013, p. 1).<sup>32</sup>

With only about 2,600 schools in North Carolina, and with the constant background noise of multiple, overlapping, and sometimes conflicting initiatives in operation in any of them at any given time, it can be challenging to identify a reasonable comparison group of schools to help strengthen the analyses of outcomes for the subset of schools impacted by a given policy—in this case, impacted by the introduction of the ISD. In addition, in North Carolina there is the added challenge of identifying whether a given school—whether an ISD school or a potential comparison school—and its staff have been exposed to similar programs in the recent past. For example, in recent years, many of the schools on the ISD consideration list (Appendix B) have been impacted directly or indirectly by the work of the state District and School Transformation team, which was tasked with identifying and assisting the turnaround of the lowest-performing schools in the state, meaning that in many cases, either the introduction of the ISD initiative is not a new concept or the impacts of previous initiatives in potential comparison schools still linger. As a result, while we continue to take great care in our selection of comparison schools, we also will continue to present all conclusions from our analyses with a strong word of caution.

### *Propensity Score Matching*

Linden (2015), Rubin (2001),<sup>33</sup> and others recommend using a statistical process known as **propensity score matching** (PSM) for identifying members of comparison groups for analyses like the ones we proposed to use ([Appendix F](#)). Many researchers suggest that the specific PSM

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<sup>32</sup> Somers, M., Zhu, P., Jacob, R., and Bloom, H. (2013). The Validity and Precision of the Comparative Interrupted Time Series Design and the Difference-in-Difference Design in Educational Evaluation. Working Paper. New York and Oakland, CA: MDRC.

<sup>33</sup> Linden, A. (2015). Conducting Interrupted Time-Series Analysis for Single- and Multiple-Group Comparisons. *The Stata Journal*, 15(2): 480-500; Rubin, D. B. (2001). Using Propensity Scores to Help Design Observational Studies: Application to the Tobacco Litigation. *Health Services and Outcomes Research Methodology*, 2(3-4): 169-188.

strategy—and there are several—matters much less than does the choice of variables on which schools are matched (see, for instance, Hallberg et al. 2018<sup>34</sup>). In addition to including pre-intervention measures of the outcomes of interest as part of the matching process (in our case, student testing outcomes), our matching also includes demographic covariates that change over time or are likely to have been impacted by historical changes outside the scope of the initiative, to reduce the influence of those factors on analyses of the outcomes of interest (Hallberg et al. 2018).

Based on the findings of Somers et al. (2013), since we have a large candidate pool of schools relative to the treated schools, and since we have more than two years of pre-intervention test data, we use a **radius matching** (propensity scores within 0.25 SD of each treatment school's score) with replacement, which matches each treatment school to several schools within a given propensity score range, increases the size of the comparison pool, and likely has little impact on bias because of the depth of pre-intervention data available for matching.

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<sup>34</sup> Hallberg, K., Williams, R., Swanlund, A., and Eno, J. (2018). Short Comparative Interrupted Time Series Using Aggregate School-Level Data in Education Research. *Educational Researcher*, 47(5): 295-306.

## Appendix H: Survey Instruments

8/15/2019

Qualtrics Survey Software

### Intro

#### ISD Evaluation Teacher & Staff Survey

Thank you for your participation in the North Carolina Innovation School District evaluation survey. Our questions are intended to give us more information about the impact of the ISD program, which your school is part of this year.

There are no right or wrong answers; we encourage your honest and candid responses. All responses are kept strictly confidential. In reports, all responses will be combined, so no one will be able to connect you to your responses.

Your participation is entirely voluntary and you may exit the survey at any time. We appreciate your willingness to participate and thank you in advance for your insight.

If you have questions or technical difficulty while completing the survey, please contact Trip Stallings at the Friday Institute, NC State University, by telephone (919.513.8576) or by email ([dtstalli@ncsu.edu](mailto:dtstalli@ncsu.edu)).

### Consent

**[Click here](#) for a downloadable copy of this consent form.**

#### North Carolina State University INFORMED CONSENT FORM for RESEARCH

##### Educator Consent Form

Title of Study: *North Carolina Innovation School District Evaluation*  
Principal Investigator: Dr. Trip Stallings

##### What is the purpose of this study?

On behalf of The North Carolina Department of Public Instruction (NCDPI), the Friday Institute at North Carolina State University is evaluating the Innovative School District (ISD). The ISD operates as a separate, non-geographical school district within NCDPI, with the purpose of improving chronically low-performing schools throughout the state. The ISD's charge is to work with identified schools and their communities to foster accountable, data-driven partnerships designed to promote and implement a shared vision of equity and opportunity for students in those schools. The intent of the evaluation is to help school, ISD, and NCDPI leadership understand the impact of the ISD.

<https://ncsu.ca1.qualtrics.com/Q/EditSection/Blocks/Ajax/GetSurveyPrintPreview>

1/6

8/15/2019

Qualtrics Survey Software

**What will happen if you take part in the study?**

Teachers and Administrators will be invited to participate in surveys and focus group interviews to discuss their impressions of and experiences with the pilot program. Surveys will take approximately 10-20 minutes to complete; group interviews will take approximately 30-60 minutes to complete. Participants will be asked to convene at a time that is least disruptive to their day-to-day work responsibilities. All interviews will be coordinated with local school staff and conducted on school grounds.

**Risks**

There are no big risks in taking part in this study.

**Benefits**

There are no direct benefits, but the results from this study will help determine the impact of the ISD program and help inform future education models.

**Will there be any audio/video recording?**

The interviews will be digitally audio- recorded and then transcribed. After transcription, the recordings will be destroyed.

**Confidentiality**

All information collected for this study will be stored in secure, password-protected locations at NC State University, and only researchers at NC State will be able to see it. The researchers will never share information from the study that will allow people to connect what is shared with the individual who shared it.

**Compensation**

None.

**What if you have questions about this study?**

If you have questions at any time about the study, you may contact the research coordinator, Trip Stallings (919.513.8576, dtstalli@ncsu.edu) at the Friday Institute for Educational Innovation, North Carolina State University, 1890 Main Campus Road, Campus Box 7249, Raleigh, NC 27606.

Consent to Participate

"I have read and understand the above information. I have received a copy of this form. I agree to participate in this study with the understanding that I may choose not to participate or to stop participating at any time without penalty or loss of benefits to which I am otherwise entitled."

- ☐ Yes, I agree to participate in the study with the understanding that I may withdraw at any time.
- ☐ No, I decline to participate.

**Demographics**

What is the name of the school where you work this year?

- ☐ Southside-Ashpole Elementary School

What grade(s) do you teach this year?

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- ☐ Kindergarten
- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5
- ☐ Other (please specify):

I identify as:

- ☐ Female
- ☐ Male
- ☐ Other
- ☐ I decline to answer

I identify as:

- ☐ American Indian or Alaska Native (Not Hispanic or Latino) - A person having origins in any of the original peoples of North and South America (including Central America), and who maintains tribal affiliation or community attachment.
- ☐ Asian (Not Hispanic or Latino) - A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian Subcontinent, including for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, or Vietnam.
- ☐ Black or African American (Not Hispanic or Latino) - A person having origins in any of the black racial groups of Africa.
- ☐ Hispanic or Latino - A person having ethnic origins in Latin America and the Iberian Peninsula, including the Caribbean.
- ☐ Native Hawaiian or Other Pacific Islander (Not Hispanic or Latino) - A person having origins in any of the peoples of Hawaii, Guam, Samoa, or other Pacific Islands.
- ☐ White (Not Hispanic or Latino) - A person having origins in any of the original peoples of Europe, the Middle East, or North Africa.
- ☐ Two or more races/ethnicities - A person who identifies with two or more of the above.
- ☐ I decline to answer

### Survey Questions

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**Instructions**

- For each statement, select the box response best matches how much you agree with the statement.
- If you do not have enough information to form an opinion on an item, or if an item does not apply to your situation, select "Do Not Know or Not Applicable."
- If you have enough information to form an opinion but are split between "Agree" and "Disagree," select "Neutral."

At \${q://QID6/ChoiceGroup/SelectedChoices} this year...

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
I have opportunities to participate in grade-level and school-level planning committees.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
School leadership encourages teachers and staff to take leadership opportunities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
School leadership asks me for their opinions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If I have a concern about a curriculum, policy, or other decision, I feel comfortable talking to someone in school leadership.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I have a say in choosing the curriculum I use in my classroom.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
All staff members are treated equitably.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

At \${q://QID6/ChoiceGroup/SelectedChoices} this year...

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Strongly  
Agree   Agree   Neutral   Disagree   Strongly  
Disagree

I feel connected to the community my school serves.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I communicate with parents/guardians on a regular basis.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I have parent/guardian volunteers in my classroom.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

At \${q://QID6/ChoiceGroup/SelectedChoices} this year...

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
I use student data to improve instruction.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There is a process in place to help all staff members improve.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The professional development offered by my school is high-quality.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The professional development offered by my school is relevant to my needs.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I have enough time in my schedule each week for lesson planning.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I have time set in my schedule to plan and collaborate with other teachers and staff.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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English ▼

## Intro

### ISD Evaluation

#### Parent/Guardian Survey

Thank you for taking our survey about your child's/children's school. This survey is part of an evaluation of the North Carolina Innovation School District, which Southside-Ashpole Elementary School is part of this year. Our questions are intended to give us more information about the impact of the ISD program.

There are no right or wrong answers; we encourage your honest and candid responses. All responses are kept strictly confidential. In reports, all responses will be combined, so no one will be able to connect you to your responses.

Your participation is entirely voluntary and you may exit the survey at any time. We appreciate your willingness to participate and thank you in advance for your insight.

If you have questions or technical difficulty while completing the survey, please contact Trip Stallings at the Friday Institute, NC State University, by telephone (919.513.8576) or by email ([dtstalli@ncsu.edu](mailto:dtstalli@ncsu.edu)).

## Consent

[Click here](#) for a downloadable copy of the consent form in English and Spanish.

**North Carolina State University  
INFORMED CONSENT FORM for RESEARCH**

**Parent Consent Form**

Title of Study: *North Carolina Innovation School District Evaluation*  
Principal Investigator: Dr. Trip Stallings

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**What is the purpose of this study?**

On behalf of The North Carolina Department of Public Instruction (NCDPI), the Friday Institute at North Carolina State University is evaluating the Innovative School District (ISD). The ISD operates as a separate, non-geographical school district within NCDPI, with the purpose of improving chronically low-performing schools throughout the state. The ISD's charge is to work with identified schools and their communities to foster accountable, data-driven partnerships designed to promote and implement a shared vision of equity and opportunity for students in those schools. The intent of the evaluation is to help school, ISD, and NCDPI leadership understand the impact of the ISD.

**What will happen if you take part in the study?**

Parents and guardians will be invited to participate in surveys to discuss their experiences with the ISD. The surveys will take approximately 10 minutes to complete.

**Risks**

There are no big risks in taking part in this study.

**Benefits**

There are no direct benefits, but the results from this study will help determine the impact of the ISD program and help inform future education models.

**Confidentiality**

All information collected for this study will be stored in secure, password-protected locations at NC State University, and only researchers at NC State will be able to see it. The researchers will never share information from the study that will allow people to connect what is shared with the individual who shared it.

**Compensation**

None.

**What if you have questions about this study?**

If you have questions at any time about the study, you may contact the research coordinator, Trip Stallings (919.513.8576, dtstalli@ncsu.edu) at the Friday Institute for Educational Innovation, North Carolina State University, 1890 Main Campus Road, Campus Box 7249, Raleigh, NC 27606.

**Consent to Participate**

"I have read and understand the above information. I have received a copy of this form. I agree to participate in this study with the understanding that I may choose not to participate or to stop participating at any time without penalty or loss of benefits to which I am otherwise entitled."

- ☐ Yes, I agree to participate in the study with the understanding that I may withdraw at any time.
- ☐ No, I decline to participate.

**Demographics**

Select the name of the school that at least one of your children attends from the list below.

- ☐ Southside-Ashpole Elementary School
- ☐ My child does not attend any of these schools

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What grade(s) is your child/are your children in this year at  $\{q://QID6/ChoiceGroup/SelectedChoices\}$ ? If you have more than one child at  $\{q://QID6/ChoiceGroup/SelectedChoices\}$ , select all of the grades that apply.

- ☐ Kindergarten
- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5

I identify as:

- ☐ American Indian or Alaska Native (Not Hispanic or Latino) - A person having origins in any of the original peoples of North and South America (including Central America), and who maintains tribal affiliation or community attachment.
- ☐ Asian (Not Hispanic or Latino) - A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian Subcontinent, including for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, or Vietnam.
- ☐ Black or African American (Not Hispanic or Latino) - A person having origins in any of the black racial groups of Africa.
- ☐ Hispanic or Latino - A person having ethnic origins in Latin America and the Iberian Peninsula, including the Caribbean.
- ☐ Native Hawaiian or Other Pacific Islander (Not Hispanic or Latino) - A person having origins in any of the peoples of Hawaii, Guam, Samoa, or other Pacific Islands.
- ☐ White (Not Hispanic or Latino) - A person having origins in any of the original peoples of Europe, the Middle East, or North Africa.
- ☐ Two or more races/ethnicities - A person who identifies with two or more of the above.
- ☐ I decline to answer

### Survey Questions: Likert

### Instructions

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- For each statement, select the response that best matches how much you agree with the statement.
- If you do not have enough information to form an opinion on an item, or if an item does not apply to your situation, select "Do Not Know or Not Applicable."
- If you have enough information to form an opinion but are split between "Agree" and "Disagree," select "Neutral."
- If you have more than one child at \${q://QID6/ChoiceGroup/SelectedChoices} this year, select the response that best matches how you feel in general about your experience with the school this year.

At \${q://QID6/ChoiceGroup/SelectedChoices} this year...

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
My child is safe at school.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If my child feels threatened at school, adults at the school will help him/her.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If my child is bullied outside of school (for instance, online), he/she can get help from an adult at school.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

With regard to \${q://QID6/ChoiceGroup/SelectedChoices} this year...

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
If I tell my child's teachers about a concern with my child (for instance, related to academic challenges, behavior issues, etc.), they will try to address my concern.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If I tell the school administrators about a concern with my child (for instance, related to academic challenges, behavior issues, etc.) or the school, they will try to address my concern.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel comfortable talking to my child's teachers.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
I feel comfortable talking to administrators at my child's school.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I know what to do when problems arise with my child in school.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel welcomed at the school.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

With regard to \${q://QID6/ChoiceGroup/SelectedChoices} this year...

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
The school provides me with clear information about what my child is learning in school.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The school provides me with clear information about how to support my child's learning at home.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I have a good idea of how my child is doing in school.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I regularly talk to my child about what he/she is learning in school.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I assist my child with his/her homework.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The school has helped me learn new ways to help my child grow and develop in school.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

The primary language we use at home is:

☐ English  
☐ Spanish  
☐ Other

With regard to \${q://QID6/ChoiceGroup/SelectedChoices} this year...

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	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
The school communicates with me in the language my family uses at home.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

### Survey Questions: Frequency

#### Instructions

- For each statement, select the box response comes closest to describing how often you do each activity.
- If you do not have enough information to form an opinion on an item, select "Do Not Know."
- If you have more than one child at \${q://QID6/ChoiceGroup/SelectedChoices} this year, select the response that best matches how you feel in general about your experience with the school this year.

As a parent of a child/children at \${q://QID6/ChoiceGroup/SelectedChoices}, during this school year, how often have you done each of the following activities?

	Never	Once or Twice	Once Every Few Months	Monthly	Weekly or More
Meet in person with teachers at your child's school	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visit your child's school	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Participate in decision-making groups, committees, or advisory councils at your child's school	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

### Survey Questions: Importance

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**Instructions**

- For each statement, select the box that comes closest to describing how important you feel each activity is.
- If you do not have enough information to form an opinion on an item, select "Do Not Know."

How important is each of these to your child's/children's success in school?

	Absolutely Essential	Very Important	Of Average Importance	Slightly Important	Not Important At All	Do Not Know
Attending school regularly	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Completing homework regularly	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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## **ISD Evaluation**

### **Student Survey**

Thank you for taking our survey about your school.

Please answer the survey honestly and truthfully. There are no right or wrong answers. You will not be asked for your name so no one will know what you said.

Your participation is voluntary and you may stop taking the survey at any time. We appreciate your participation and thank you in advance for your help.

If you have questions while completing the survey, please contact Trip Stallings by telephone (919.513.8576) or by email (dtstalli@ncsu.edu).

**Circle the school and grade you are in this year.**

A. What school do you go to?

Southside-Ashpole Elementary School

B. What grade are you in?

Grade 3

Grade 4

Grade 5

**Instructions**

- Circle the answer that best matches how much you **agree** with each statement.
- If you are **not sure how you feel** about a statement, circle **“I Don’t Know.”**
- If you agree with the statement some of the time and disagree some of the time, circle **“Sometimes Agree/Sometimes Disagree.”**

1. I feel safe at my school.

Agree                      Sometimes Agree/Sometimes Disagree                      Disagree                      I Don’t Know

2. If I feel threatened at school, adults at my school will help me.

Agree                      Sometimes Agree/Sometimes Disagree                      Disagree                      I Don’t Know

3. If I am bullied outside of school by someone from my school (in person or online), adults at my school will help me.

Agree                      Sometimes Agree/Sometimes Disagree                      Disagree                      I Don’t Know

4. Overall, adults at my school treat students fairly.

Agree                      Sometimes Agree/Sometimes Disagree                      Disagree                      I Don’t Know

5. Adults in my school treat me with respect.

Agree                      Sometimes Agree/Sometimes Disagree                      Disagree                      I Don’t Know

6. Adults at my school listen to students.

Agree                      Sometimes Agree/Sometimes Disagree                      Disagree                      I Don’t Know

7. At my school, teachers care about students.

Agree      Sometimes Agree/Sometimes Disagree      Disagree      I Don't Know

8. Adults at my school are available if I need help.

Agree      Sometimes Agree/Sometimes Disagree      Disagree      I Don't Know

9. In general, I enjoy going to school.

Agree      Sometimes Agree/Sometimes Disagree      Disagree      I Don't Know

10. Most teachers take time to answer my questions.

Agree      Sometimes Agree/Sometimes Disagree      Disagree      I Don't Know

11. Most teachers grade my assignments and tests fairly.

Agree      Sometimes Agree/Sometimes Disagree      Disagree      I Don't Know

Appendix I: Survey Results

Survey Response Key:

SD: Strongly Disagree  
D: Disagree  
N: Neutral  
SA/SD: Sometimes Agree, Sometimes Disagree  
A: Agree  
SA: Strongly Agree  
IDK: I Don't Know

Parent/Guardian and Student Common Questions

Q1		My child is safe at school. / I feel safe at my school.									
		SD	D	N	A	SA	IDK	SD + D	N	A + SA	n
Parent/Guardian		6%	18%	12%	47%	18%	0%	24%	12%	65%	17
Student*		-	11%	22%	59%	-	9%	11%	22%	59%	46
Q2		If my child feels threatened at school, adults at the school will help him/her. / If I feel threatened at school, adults at my school will help me.									
		SD	D	N	A	SA	IDK	SD + D	N	A + SA	n
Parent/Guardian		12%	12%	24%	35%	18%	0%	24%	24%	53%	17
Student*		-	13%	9%	67%	-	11%	13%	9%	67%	46
Q3		If my child is bullied outside of school (for instance, online), he/she can get help from an adult at school. / If I am bullied outside of school (for instance, online) by someone from my school, adults at my school will help me.									
		SD	D	N	A	SA	IDK	SD + D	N	A + SA	n
Parent/Guardian		18%	0%	18%	35%	24%	6%	18%	18%	59%	17
Student*		-	17%	15%	54%	-	13%	17%	15%	54%	46

\*The student survey uses a limited response set: Agree, Sometimes Agree/Sometimes Disagree, Disagree, and I Don't Know. Here, Sometimes Agree/Sometimes Disagree is recorded as Neutral.

Parent

Q1	My child is safe at school.									
	<i>SD</i>	<i>D</i>	<i>N</i>	<i>A</i>	<i>SA</i>	<i>IDK</i>	<i>SD + D</i>	<i>N</i>	<i>A + SA</i>	<i>n</i>
	6%	18%	12%	47%	18%	0%	24%	12%	65%	17
Q2	If my child feels threatened at school, adults at the school will help him/her.									
	<i>SD</i>	<i>D</i>	<i>N</i>	<i>A</i>	<i>SA</i>	<i>IDK</i>	<i>SD + D</i>	<i>N</i>	<i>A + SA</i>	<i>n</i>
	12%	12%	24%	35%	18%	0%	24%	24%	53%	17
Q3	If my child is bullied outside of school (for instance, online), he/she can get help from an adult at school.									
	<i>SD</i>	<i>D</i>	<i>N</i>	<i>A</i>	<i>SA</i>	<i>IDK</i>	<i>SD + D</i>	<i>N</i>	<i>A + SA</i>	<i>n</i>
	18%	0%	18%	35%	24%	6%	18%	18%	59%	17
Q4	If I tell my child's teachers about a concern with my child (for instance, related to academic challenges, behavior issues, etc.), they will try to address my concern.									
	<i>SD</i>	<i>D</i>	<i>N</i>	<i>A</i>	<i>SA</i>	<i>IDK</i>	<i>SD + D</i>	<i>N</i>	<i>A + SA</i>	<i>n</i>
	6%	0%	29%	29%	35%	0%	6%	29%	64%	17
Q5	If I tell the school administrators about a concern with my child (for instance, related to academic challenges, behavior issues, etc.) or the school, they will try to address my concern.									
	<i>SD</i>	<i>D</i>	<i>N</i>	<i>A</i>	<i>SA</i>	<i>IDK</i>	<i>SD + D</i>	<i>N</i>	<i>A + SA</i>	<i>n</i>
	6%	6%	29%	35%	24%	0%	12%	29%	59%	17
Q6	I feel comfortable talking to my child's teachers.									
	<i>SD</i>	<i>D</i>	<i>N</i>	<i>A</i>	<i>SA</i>	<i>IDK</i>	<i>SD + D</i>	<i>N</i>	<i>A + SA</i>	<i>n</i>
	0%	6%	18%	35%	41%	0%	6%	18%	76%	17
Q7	I feel comfortable talking to administrators at my child's school.									
	<i>SD</i>	<i>D</i>	<i>N</i>	<i>A</i>	<i>SA</i>	<i>IDK</i>	<i>SD + D</i>	<i>N</i>	<i>A + SA</i>	<i>n</i>
	0%	12%	18%	47%	24%	0%	12%	18%	71%	17
Q8	I know what to do when problems arise with my child in school.									
	<i>SD</i>	<i>D</i>	<i>N</i>	<i>A</i>	<i>SA</i>	<i>IDK</i>	<i>SD + D</i>	<i>N</i>	<i>A + SA</i>	<i>n</i>
	0%	6%	6%	41%	47%	0%	6%	6%	88%	17
Q9	I feel welcomed at the school.									
	<i>SD</i>	<i>D</i>	<i>N</i>	<i>A</i>	<i>SA</i>	<i>IDK</i>	<i>SD + D</i>	<i>N</i>	<i>A + SA</i>	<i>n</i>
	0%	0%	18%	47%	35%	0%	0%	18%	82%	17

**Q10** The school provides me with clear information about what my child is learning school.

<i>SD</i>	<i>D</i>	<i>N</i>	<i>A</i>	<i>SA</i>	<i>IDK</i>
6%	0%	41%	24%	29%	0%

<i>SD + D</i>	<i>N</i>	<i>A + SA</i>	<i>n</i>
6%	41%	53%	17

**Q11** The school provides me with clear information about how to support my child's learning at home.

<i>SD</i>	<i>D</i>	<i>N</i>	<i>A</i>	<i>SA</i>	<i>IDK</i>
6%	0%	47%	18%	29%	0%

<i>SD + D</i>	<i>N</i>	<i>A + SA</i>	<i>n</i>
6%	47%	47%	17

**Q12** I have a good idea of how my child is doing in school.

<i>SD</i>	<i>D</i>	<i>N</i>	<i>A</i>	<i>SA</i>	<i>IDK</i>
6%	0%	29%	41%	24%	0%

<i>SD + D</i>	<i>N</i>	<i>A + SA</i>	<i>n</i>
6%	29%	65%	17

**Q13** I regularly talk to my child about what he/she is learning in school.

<i>SD</i>	<i>D</i>	<i>N</i>	<i>A</i>	<i>SA</i>	<i>IDK</i>
0%	6%	0%	47%	47%	0%

<i>SD + D</i>	<i>N</i>	<i>A + SA</i>	<i>n</i>
6%	0%	94%	17

**Q14** I assist my child with his/her homework.

<i>SD</i>	<i>D</i>	<i>N</i>	<i>A</i>	<i>SA</i>	<i>IDK</i>
0%	0%	12%	41%	35%	12%

<i>SD + D</i>	<i>N</i>	<i>A + SA</i>	<i>n</i>
0%	12%	76%	17

**Q15** The school has helped me learn new ways to help my child grow and develop in school.

<i>SD</i>	<i>D</i>	<i>N</i>	<i>A</i>	<i>SA</i>	<i>IDK</i>
6%	6%	29%	29%	24%	6%

<i>SD + D</i>	<i>N</i>	<i>A + SA</i>	<i>n</i>
12%	29%	53%	17

**Q16** The primary language we use at home is:

<i>English</i>	<i>Spanish</i>	<i>Other</i>
100%	0%	0%

<i>n</i>
17

**Q17** The school communicates with me in the language my family uses at home.

<i>SD</i>	<i>D</i>	<i>N</i>	<i>A</i>	<i>SA</i>	<i>IDK</i>
0%	0%	6%	53%	41%	0%

<i>SD + D</i>	<i>N</i>	<i>A + SA</i>	<i>n</i>
0%	6%	94%	17

As a parent of a child/children at Southside Ashpole Elementary School, during this school year, how often have you done each of the following activities?

**Q18** Meet in person with teachers at your child's school.

<i>Once Every</i>				
<i>Never</i>	<i>Once/Twice</i>	<i>Few Months</i>	<i>Monthly</i>	<i>Weekly or More</i>
0%	47%	18%	24%	12%

<i>n</i>
17

Q19	Visit you child's school.					<i>n</i>
			<i>Once Every</i>			
			<i>Few</i>		<i>Weekly or</i>	
	<i>Never</i>	<i>Once/Twice</i>	<i>Months</i>	<i>Monthly</i>	<i>More</i>	
	0%	12%	24%	24%	41%	17

Q20	Participate in decision-making groups, committees, or advisory councils at your child's school.					<i>n</i>
			<i>Once Every</i>			
			<i>Few</i>		<i>Weekly or</i>	
	<i>Never</i>	<i>Once/Twice</i>	<i>Months</i>	<i>Monthly</i>	<i>More</i>	
	77%	12%	6%	6%	0%	17

How important is each of these to your child's/children's success in school?

Q21	Attending school regularly.					
				Not		
	Absolutely	Very	Of Average	Slightly	Important	Do Not
	Essential	Important	Importance	Important	At All	Know
	71%	24%	0%	0%	0%	6%
						<i>n</i>
						17

Q22	Completing homework regularly.						
					Not		
	Absolutely	Very	Of Average	Slightly	Important	Do Not	
	Essential	Important	Importance	Important	At All	Know	n
	71%	24%	0%	0%	0%	6%	17

Student

Q1	I feel safe at my school.				<i>n</i>
	<i>D</i>	<i>SA/SD</i>	<i>A</i>	<i>IDK</i>	
	11%	22%	59%	9%	
					46

Q2	If I feel threatened at school, adults at my school will help me.				<i>n</i>
	<i>D</i>	<i>SA/SD</i>	<i>A</i>	<i>IDK</i>	
	13%	9%	67%	11%	
					46

Q3	If I am bullied outside of school by someone from my school (in person or online, adults at my school will help me.				<i>n</i>
	<i>D</i>	<i>SA/SD</i>	<i>A</i>	<i>IDK</i>	
	17%	15%	54%	13%	
					46



Q4	Overall, adults at my school treat students fairly.				<i>n</i> 45
	<i>D</i>	<i>SA/SD</i>	<i>A</i>	<i>IDK</i>	
	16%	13%	64%	7%	
Q5	Adults in my school treat me with respect.				<i>n</i> 46
	<i>D</i>	<i>SA/SD</i>	<i>A</i>	<i>IDK</i>	
	13%	11%	67%	9%	
Q6	Adults at my school listen to students.				<i>n</i> 46
	<i>D</i>	<i>SA/SD</i>	<i>A</i>	<i>IDK</i>	
	13%	28%	57%	2%	
Q7	At my school, teachers care about students.				<i>n</i> 45
	<i>D</i>	<i>SA/SD</i>	<i>A</i>	<i>IDK</i>	
	7%	7%	78%	9%	
Q8	Adults at my school are available if I need help.				<i>n</i> 46
	<i>D</i>	<i>SA/SD</i>	<i>A</i>	<i>IDK</i>	
	9%	11%	72%	9%	
Q9	In general, I enjoy going to school.				<i>n</i> 46
	<i>D</i>	<i>SA/SD</i>	<i>A</i>	<i>IDK</i>	
	24%	33%	39%	4%	
Q10	Most teachers take time to answer my questions.				<i>n</i> 46
	<i>D</i>	<i>SA/SD</i>	<i>A</i>	<i>IDK</i>	
	24%	22%	48%	7%	
Q11	Most teachers grade my assignments and tests fairly.				<i>n</i> 46
	<i>D</i>	<i>SA/SD</i>	<i>A</i>	<i>IDK</i>	
	7%	9%	78%	7%	
Q12	What grade are you in this year?				<i>n</i> 46
	3	4	5		
	33%	33%	35%		

Teachers

Q1	I have opportunities to participate in grade level and school-level planning committees.									
	<i>SD</i>	<i>D</i>	<i>N</i>	<i>A</i>	<i>SA</i>	<i>IDK</i>	<i>SD + D</i>	<i>N</i>	<i>A + SA</i>	<i>n</i>
	0%	8%	8%	42%	42%	0%	8%	8%	83%	12
Q2	School leadership encourages teachers and staff to take leadership opportunities.									
	<i>SD</i>	<i>D</i>	<i>N</i>	<i>A</i>	<i>SA</i>	<i>IDK</i>	<i>SD + D</i>	<i>N</i>	<i>A + SA</i>	<i>n</i>
	0%	8%	8%	58%	25%	0%	8%	8%	83%	12
Q3	School leadership asks me for their opinions.									
	<i>SD</i>	<i>D</i>	<i>N</i>	<i>A</i>	<i>SA</i>	<i>IDK</i>	<i>SD + D</i>	<i>N</i>	<i>A + SA</i>	<i>n</i>
	8%	17%	8%	3%	25%	8%	25%	8%	28%	12
Q4	If I have a concern about a curriculum, policy, or other decision, I feel comfortable talking to someone in school leadership.									
	<i>SD</i>	<i>D</i>	<i>N</i>	<i>A</i>	<i>SA</i>	<i>IDK</i>	<i>SD + D</i>	<i>N</i>	<i>A + SA</i>	<i>n</i>
	8%	8%	17%	25%	42%	0%	17%	17%	67%	12
Q5	I have a say in choosing the curriculum I use in my classroom.									
	<i>SD</i>	<i>D</i>	<i>N</i>	<i>A</i>	<i>SA</i>	<i>IDK</i>	<i>SD + D</i>	<i>N</i>	<i>A + SA</i>	<i>n</i>
	9%	18%	18%	36%	9%	9%	27%	18%	45%	11
Q6	All staff members are treated equitably.									
	<i>SD</i>	<i>D</i>	<i>N</i>	<i>A</i>	<i>SA</i>	<i>IDK</i>	<i>SD + D</i>	<i>N</i>	<i>A + SA</i>	<i>n</i>
	0%	27%	9%	27%	27%	9%	27%	9%	55%	11
Q7	I feel connected to the community my school serves.									
	<i>SD</i>	<i>D</i>	<i>N</i>	<i>A</i>	<i>SA</i>	<i>IDK</i>	<i>SD + D</i>	<i>N</i>	<i>A + SA</i>	<i>n</i>
	0%	8%	25%	42%	17%	8%	8%	25%	58%	12
Q8	I communicate with parents/guardians on a regular basis.									
	<i>SD</i>	<i>D</i>	<i>N</i>	<i>A</i>	<i>SA</i>	<i>IDK</i>	<i>SD + D</i>	<i>N</i>	<i>A + SA</i>	<i>n</i>
	0%	0%	0%	58%	42%	0%	0%	0%	100%	12
Q9	I have parent/guardian volunteers in my classroom.									
	<i>SD</i>	<i>D</i>	<i>N</i>	<i>A</i>	<i>SA</i>	<i>IDK</i>	<i>SD + D</i>	<i>N</i>	<i>A + SA</i>	<i>n</i>
	0%	42%	17%	17%	17%	8%	42%	17%	33%	12

Q10	I use student data to improve instruction.									
	<i>SD</i>	<i>D</i>	<i>N</i>	<i>A</i>	<i>SA</i>	<i>IDK</i>	<i>SD + D</i>	<i>N</i>	<i>A + SA</i>	<i>n</i>
	0%	0%	0%	42%	58%	0%	0%	0%	100%	12
Q11	There is a process in place to help all staff members improve.									
	<i>SD</i>	<i>D</i>	<i>N</i>	<i>A</i>	<i>SA</i>	<i>IDK</i>	<i>SD + D</i>	<i>N</i>	<i>A + SA</i>	<i>n</i>
	0%	0%	42%	50%	8%	0%	0%	42%	58%	12
Q12	The professional development offered by my school is high-quality.									
	<i>SD</i>	<i>D</i>	<i>N</i>	<i>A</i>	<i>SA</i>	<i>IDK</i>	<i>SD + D</i>	<i>N</i>	<i>A + SA</i>	<i>n</i>
	0%	8%	25%	58%	8%	0%	8%	25%	67%	12
Q13	The professional development offered by my school is relevant to my needs.									
	<i>SD</i>	<i>D</i>	<i>N</i>	<i>A</i>	<i>SA</i>	<i>IDK</i>	<i>SD + D</i>	<i>N</i>	<i>A + SA</i>	<i>n</i>
	0%	8%	33%	42%	17%	0%	8%	33%	58%	12
Q14	I have enough time in my schedule each week for lesson planning.									
	<i>SD</i>	<i>D</i>	<i>N</i>	<i>A</i>	<i>SA</i>	<i>IDK</i>	<i>SD + D</i>	<i>N</i>	<i>A + SA</i>	<i>n</i>
	0%	25%	33%	25%	17%	0%	25%	33%	42%	12
Q15	I have time set in my schedule to plan and collaborate with other teachers and staff.									
	<i>SD</i>	<i>D</i>	<i>N</i>	<i>A</i>	<i>SA</i>	<i>IDK</i>	<i>SD + D</i>	<i>N</i>	<i>A + SA</i>	<i>n</i>
	0%	8%	25%	33%	33%	0%	8%	25%	67%	12

## Appendix J: Recommended School-Level Annual Report Components

### Q2. Does the ISD improve learning conditions, including changes in student behavior?

- Description of Exceptional Children (EC) plan (outlining the full continuum of services to meet the special education and related services needs of students with disabilities)
- Proof of a highly-qualified and licensed special education teacher(s) and/or director
- Identification of sources for external EC service providers (e.g., school psychologist, occupational therapist, physical therapist, speech language pathologist, etc.)
- Evidence of on-site/accessible, appropriate instructional supports for students with disabilities (as indicated in IEPs)
- Statement of school policies for EC, incorporating all required elements to meet Federal and State regulations (e.g., discipline, confidentiality, accountability, maintenance of effort, security and confidentiality of EC Student Special Education files, etc.)
- Address transportation (as a related service) for EC students who may have this as a component of their IEP
- Description of school's approach to discipline and changes over time
- Description of school's responses to attendance problems/truancy

### Q3. Does the ISD contribute to changes in school-community engagement?

- Description of the process of identifying valuable external partners
- Annual list of partners and description of services they provide, including level of partnerships (time commitment, financial commitment)
- If evaluation budget supports: Descriptive report of offsetting services or additional value in services provided; where available, budget data on any financial offsets arising from partnerships
- Annual list of parent/guardian involvement in school events

### Q4a. Does the ISD contribute to an overall change in the culture of schooling in ISD schools?

- Plan for diffusion of best practices

### Q4b. Does the ISD change approaches to ensuring sustainable, high quality staffing in ISD schools?

- Description of teacher recruitment and retention processes
- ISO protocol for teacher evaluation
- Annual list of professional development opportunities (plus attendance figures)

### Q4c. Does the ISD change approaches to leadership in ISD schools?

- **Annual school operating costs, compared to average operating costs for similarly-sized new schools and/or new charter schools**
- Description of teacher leadership model
- Evidence of teacher leadership model implementation

### Q4d. Does the ISD contribute to changes in the *culture of schooling in partnering LEAs, non-participating LEAs, and/or across the State overall?*

- Plan for diffusion of best practices to partner LEAs

**Key:** **Red text**=indicator for legislatively-highlighted outcomes

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