MARSHALLCoLab
COLLECTIVE ACTION FOR LASTING CHANGE

Educational Equity in Times of Instability

Fall 2024

Table of Contents

Introduction

This paper is the second in a series documenting the transformative journey of the Networked Improvement Community for Students with Disabilities (NIC). Made possible by the Gates Foundation and led by Marshall Street, the NIC launched in 2020 to systematically address the ways our public education system serves Black and Latinx students with disabilities experiencing poverty. A three-year initiative across 10 public charter districts serving 75,000 students, the NIC's work was divided into three phases: *Getting Ready to Launch, Implementing Improvement Plans,* and *Sustaining and Expanding Impact*. The first phase, *Getting Ready to Launch*, is detailed in [Beyond Trust Falls: Launching a Network of Charter Districts During a Global Health Crisis](#).

Phase 2: Implementing Improvement Plans

The 2021–22 school year, Year 2 of the initiative, marked the beginning of the second phase, *Implementing Improvement Plans*. Ultimately, this phase was about equity, focus, alignment, reformation, and a back-to-basics emphasis: **Equity**, because the network was — at its core —

about closing equity gaps for our most vulnerable students; **Focus**, because in the midst of great global tumult, driving toward a clarity of focus was more important than ever; **Alignment**, since anything that did not align to the most fundamental strategic priorities of schools was understandably deprioritized in the 2021–22 school year; **Reformation**, because of the incredible faculty turnover that occurred before and during the school year across the nation and across the NIC; and an emphasis on the **Basics**, because the fundamentals set the stage for the quick wins required for lasting change to take root.

> **Our network aim: To make dramatic gains in the learning environments, experiences, and outcomes of Black and Latinx students with disabilities experiencing poverty.**

In this paper, we revisit the **context** of moving from the first to the second year of the NIC, particularly in the midst of a global pandemic. That context includes the foundational goals of the network, iterations to those goals in light of pandemic-related upheaval, and approaches to sustaining the work of equity despite unprecedented educator attrition. Then we unpack key takeaways from the second year:

1. That **distributed leadership and sustainable systems** are necessary to overcome challenges presented by staff turnover
2. How **equity** work requires intensive **focus**, and finding ways to focus participants is one of the core jobs of NIC leadership
3. The important steps of building, sustaining, and continually improving flexible **collaboration structures** to promote learning, sharing, and planning across the NIC
4. Methods for effectively **organizing and documenting improvement efforts** in education, particularly given the lessons learned from the Institute for Healthcare Improvement (IHI) model

Finally, we describe the development of **hypotheses and strategic plans** of NIC leadership moving from Year 2 to Year 3. As in our first paper, we will share our theory of action heading into the final year of the NIC so that improvement leaders can learn from our successes and our missteps.

Our Priorities for the Road Ahead

Impact (Aim)

Scale

Spread

Measurement

Documentation

Implementation
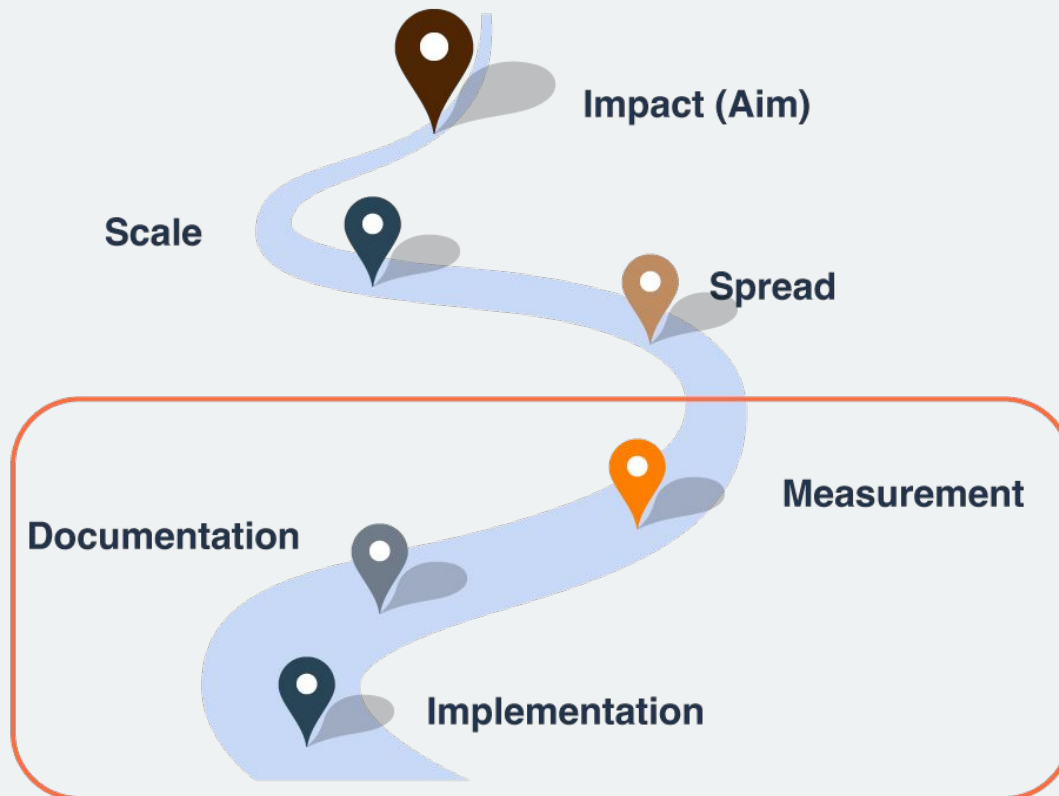
Closing Year 1, Entering Year 2

The first year of the NIC was defined by the global upheaval of the COVID-19 pandemic. As schools across the United States suspended in-person learning in March of 2020, the NIC pivoted from an original set of top-line **measurable outcomes** to a set of four **process-oriented**, **qualitative goals**:

❖ Build relationships
❖ Build trust
❖ Build capacity
❖ Build credibility

This intentional shift would prove, by the end of the NIC's first year, both **essential**, given the daily uncertainty of the pandemic, and **fraught**, given the flexible service-orientation required of technical assistance providers as a result. We, the NIC's leaders, reoriented central network assistance for schools and practitioners across three support areas:

- **Process support** (led by Marshall Street and including continuous improvement, professional development, coaching, and coordination among all support providers),

- **Content support** (coordinated by Marshall Street and including Catalyst:Ed's support engaging Genevieve Thomas as a Special Education expert-in-residence), and

- **Data support** (coordinated by Marshall Street and including RTI, SRI, and NIRN at the University of North Carolina).

The shift from a daily focus on strategic outcomes to an orientation toward process — meeting school faculties where they were at — was supported by the Gates Foundation, who recognized the need to respond to the unprecedented circumstances upending the work of educators across the network, and across the globe, in the 2020–21 school year. The nimble and context-rich nature of improvement science proved to be a natural fit for the perpetually-changing circumstances of COVID, and the tools of improvement, along with just-in-time content and data support, were helpful approaches to defining and meeting daily needs for students. Although school organizations across the network overwhelmingly expressed appreciation for the shift in focus, the shift represented a long-term risk.

That risk had been understood by leaders at Marshall Street and the Gates Foundation when defining the 2020–21 strategy, and indeed, it became the reality entering the second year of the NIC. The reorientation to a set of process outcomes and shift from a proactive leadership stance to a responsive coaching stance had changed the organizational dynamic between NIC leaders, participants, and technical support providers. For Year 2 to be successful, a reset would be critical, this time, shifting away from the responsive needs of COVID, back to the proactive equity-focused work of the three-year initiative to make dramatic gains for Black and Latinx students with disabilities experiencing poverty.

The NIC had to return to its original set of top-line **measurable outcomes** — including **measurable progress toward ambitious aims, positive partner experiences, replicability** through tools and resources that form a blueprint for new improvement efforts, **long-term spread and scale** of improvements, and **compelling narratives** to propel the field's understanding of improvement efforts. This return to the NIC's original orientation was crucial, because the NIC's priority student population, already one of the most underserved by the entire system of public education in the United States, had been further disadvantaged by the educational policies guiding our national reaction to the COVID-19 pandemic.[1]

The repositioning was difficult. CMO leaders had to recommit themselves to the equity-focused work of the three-year grant. School leaders were pressed to reopen schools for in-person learning while dedicating time to the work of innovation for their Black and Latinx students with disabilities experiencing poverty. Improvement coaches had to make the shift from responsive coaching to facilitative and directive coaching focused on a set of defined goals and deliverables with set timelines. NIC leadership had to rebuild the learning infrastructure and network measurement tools for progress monitoring after more than a year of highly contextual support that was nearly impossible to measure in quantitative terms. Collectively, we had to press the restart button and rebuild our strategy for individual school support, as well as for network systems and structures, and — most importantly — reunite the community around the vision that brought the NIC together in the first place.

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[1] Education in a Pandemic: The Disparate Impacts of COVID-19 on America's Students." U.S. Department of Education.
https://www2.ed.gov/about/offices/list/ocr/docs/20210608-impacts-of-covid19.pdf

Lessons of the Second Year

In the 2021–22 school year, we were able to see the impacts of the process orientation of the previous year. Most importantly, the NIC met its four process goals:

- **Relationships** were formed. Every NIC school had a CMO support team, led by Marshall Street, that included data liaisons from the network's research team and facilitators from SWIFT Education Center. This support team provided technical assistance, adding value to school-based faculty in the turbulent first year of the pandemic.

- **Trust** among technical assistance providers and network participants was established — perhaps more so than could be expected under any circumstances, never mind those created by the crucible of daily chaos caused by the pandemic. Educators in the network reported heightened trust not only with technical assistance providers but also with staff at the Gates Foundation.

- **Capacity** for leading improvement initiatives was built into the work of meeting the acute needs of partner schools. While Marshall did not focus on the formal language and processes of improvement science during the 2020–21 school year, coaching conversations regularly integrated the mindsets and tools of improvement: mindsets for developing and testing hypotheses, using data to validate assumptions, connecting established research and best practices as the first step in meeting student needs, and including students in creating motivating solutions. This mindset work was situated within rich historical data, captured in data decks that included root cause analyses along with both qualitative and quantitative information about the challenges facing students in the priority population. Schools were implementing Plan-Do-Study-Act (PDSA) cycles in the lightest possible ways: PDSAs were treated as frameworks for coaching conversations and problem-solving, but not as templates to be thoroughly completed on weekly cycles.

- In demonstrating care for our network participants and creating value in a time of extraordinary duress, the funder and technical assistance providers were able to build **credibility** as leaders of the NIC.

Program Officer Vanessa Murrieta of the Gates Foundation welcomes NIC participants to our first Learning Tour in Los Angeles, CA.

Despite our ultimate achievement of these goals, the NIC's second year presented significant challenges and offered essential lessons for all its participants. Key themes emerged from the work:

- The importance of building **sustainable systems and processes** in response to unprecedented attrition;

- How equity work requires i**ntensive focus on mission and vision**, and the network leaders' role in that effort;

- The important steps of building, sustaining, and continually improving flexible collaboration structures to **promote learning, sharing, and planning** across the NIC;

- The value of the **IHI model to improvement efforts** in education, particularly with regard to organization and documentation.

Sustainability Despite Attrition

The conditions going into the second year of educating students in a global pandemic naturally took a great toll on educators across the NIC. The 2021–22 school year represented one of the largest reshufflings of teachers and school leaders our nation has ever seen. Across the NIC, there was not a single quarter in which key practitioner roles were filled at all ten of the school organizations. In the fall of 2021, half of the school organizations simultaneously were in the midst of Project Sponsor transitions, and a similar trend occurred with Data Leads.

Project Sponsor Transitions Over Time
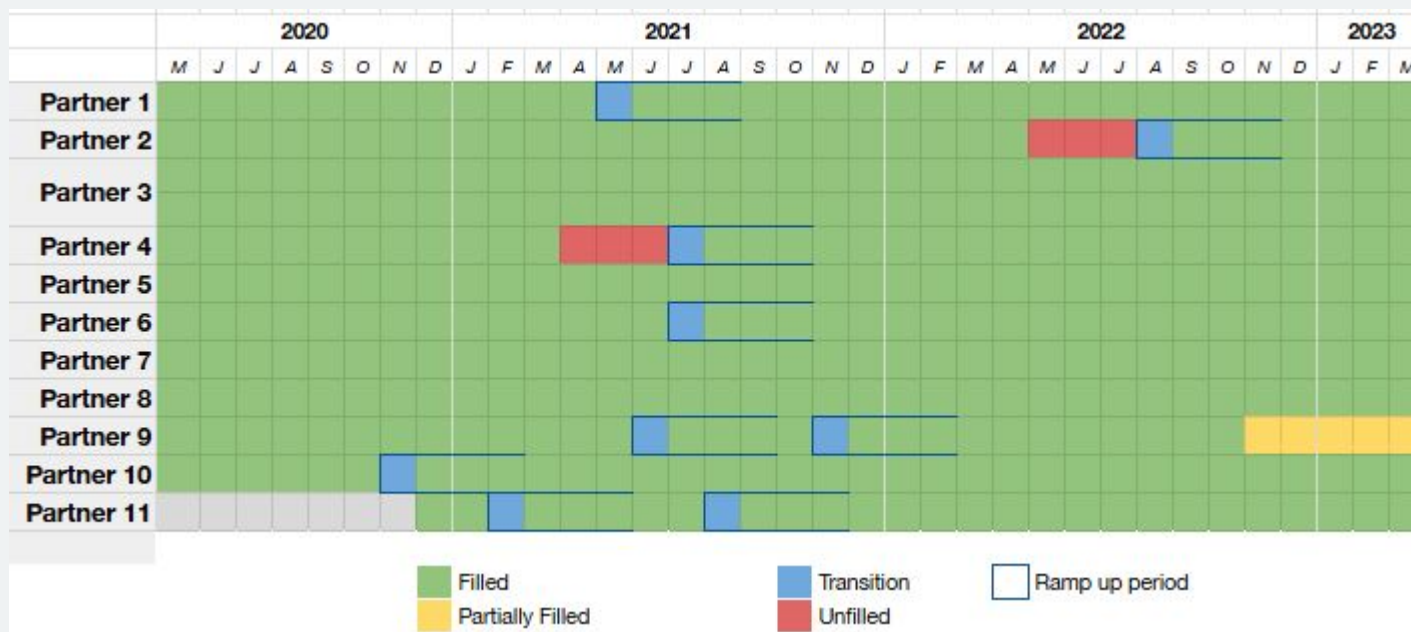
Data Lead Transitions Over Time
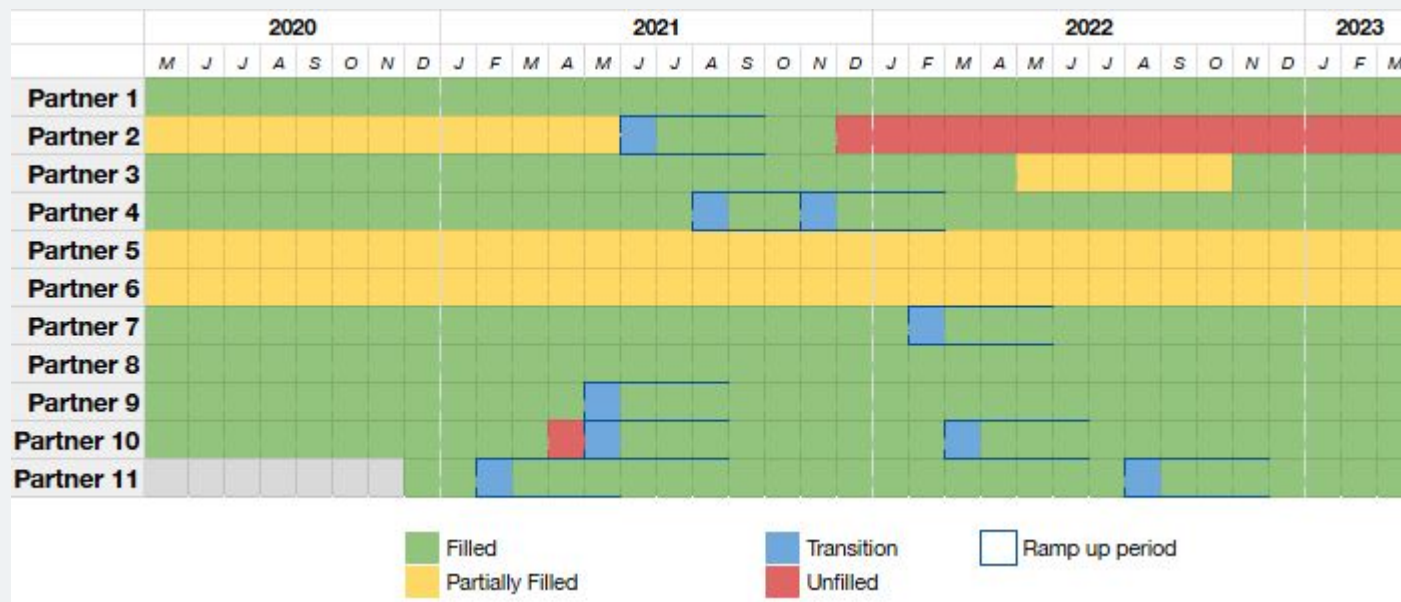
Principals across the network reported that teachers were quitting without notice or were failing to show up for work entirely. Mental health issues for students and faculty skyrocketed. School closures continued throughout the 2021–22 school year, particularly with the Omicron variant rippling across the nation in the winter months.

With this turnover, the big bet of Year 1 — to focus on building relationships, trust, capacity, and credibility — hit its most severe snag. We were reminded that relationships are not built among institutions but among individuals. Trust is not developed between organizations but between people. Capacity that resides in an individual departs along with that individual. And credibility does not transfer with a role. All of these things grow over time and among humans working together, solving together, communing together, in shared pursuit and in the best interests of students.

As a result, in Year 2 the NIC set out to **create durable systems and ways of working that could be sustained outside of individual relationships and withstand turnover on teams.** In no way did such an approach minimize the value of relationships; indeed, the systems needed to facilitate even deeper and broader connections, shared ownership, and aim-oriented behaviors. However, the challenges posed by attrition demonstrated the need for network leadership to institutionalize systems across the NIC focused on building capacity at multiple levels within school organizations. Not only would such a move prove beneficial for the sustainability of the effort in schools, but it would also set the network up for greater opportunities to spread and scale emerging best practices.

Additionally, network leadership intentionally began inviting teachers and assistant principals, particularly general educators and leadership uninvolved in special education programming and services, to network events and coaching sessions. The engagement of school and administrative personnel beyond the core roles of the NIC became a major priority in the second year and one that demonstrated great promise going into the third year of the NIC, as the improvement teams at many of the CMOs expanded.

> "In Year 2 the NIC set out to create durable systems and ways of working that could be sustained outside of individual relationships and withstand turnover on teams."

Focus on Mission and Vision

The mass attrition of 2021, and into 2022, destabilized the entire public education system. In many ways, the NIC started over in its second year. As we restarted the network, it was helpful to boil the NIC's efforts down to their essence. Repetition of the essential qualities of our work proved a beneficial approach to onboarding new members to the effort, reforming teams, and reestablishing our various roles as network leaders.

In nearly every conversation, call, and event, we reiterated the purpose of the work: **to make dramatic gains in the learning environments, experiences, and outcomes of Black and Latinx students with disabilities experiencing poverty**. Uniformly, new and returning members of the effort were galvanized and inspired by this vision — an inherently improvement-oriented vision. Network members discussed targeted universalism and wrestled with their own assumptions regarding the essence of equity work. Does working toward educational equity necessarily distract from the work of supporting all students? This question was never more relevant than in a time of unprecedented need, in which schools were challenged day-to-day by food service, staffing, attendance, funding, and safety protocols. Regularly the news media and educators referenced Maslow's Hierarchy of Needs, the implication being that the basic foundation of educational services was required to be established before doing the important but ultimately advanced work of solving the challenges facing the most systematically disadvantaged students. Targeted universalism provides a framework for approaching issues of equity within the context of widespread need, and ultimately animated members of the NIC.

Community members pose together outside of a Los Angeles school during the March 2022 Learning Tour.

Returning to the data, which demonstrate the macro educational trends at play in the 10 public districts in the network — trends that highlight how students at the intersection of historical disadvantage by race, class, and ability status exhibit unique and intersecting needs — provided a clear and measurable starting place for our work together. Encouraging storytelling and the introduction of the voices of young people to the work itself — a trend that would continue throughout the network's existence — brought heart to our network collaborations and contextualized the data. In network structures, partners were encouraged to share stories of their work, not only of triumphs but also of struggles. Holding the space for both conversations of data and discussions of experience had the effect of mobilizing both the head and the heart, or what social psychologist Jonathan Haidt refers to as the "elephant and the rider."

In sum, the reformation of the network was a return to the essentials. It was a return to equity as the primary, rather than a secondary, challenge of educational excellence. It was a return to targeted universalism as the foundation for improvement within educational settings, and to the effective implementation of both quantitative and qualitative measures to share stories and guide the work of increasing efficiency and effectiveness in school organizations.

Beyond the network restart, school leaders needed to simplify their efforts *within their charter districts*. One of the most successful methods for doing so involved explicitly tying the efforts for students in the NIC's target population to top-line strategic priorities for the school organization. STEM Preparatory Schools in Los Angeles was a model of elevating the equity work central to their NIC involvement to a top-three network-wide priority. STRIVE Prep (now Rocky Mountain Prep) in Denver did the same, taking advantage of leadership shifts to align the work of the NIC with the CMO's top-line priorities. Green Dot Public Schools in Los Angeles likewise engaged senior leadership to elevate the equity work happening in special education, and thereby de-silo the work to bridge efforts across general education and special education — an important step in solving the structural barriers to equity-focused improvement initiatives for students with disabilities. For more on the powerful work of network leaders who ensured that the equity work of the NIC was explicitly part of the strategic priorities of their school organizations, see this presentation from 2023's Carnegie Conference.

> "In sum, the reformation of the network was a return to the essentials. It was a return to equity as the primary, rather than a secondary, challenge of educational excellence."

By strategically coupling the efforts for Black and Latinx students with disabilities experiencing poverty to the broader priorities of the school organizations, savvy educators made the case that equity work is the work and that the best way to meet the needs of all students is to design for those young people positioned at the margins of the system. They also demonstrated that a big vision is mobilizing and unifying, but no grand vision is possible to operationalize in its entirety or to realize immediately. Instead, using the tools of improvement science — establishing a baseline using data, collaborating to develop SMART goals, creating a strategy (or driver diagram) to meet the goals, and then engaging a broad coalition of institutional stakeholders — in tandem with external supports guiding process, content expertise, and data capacity enables measurable improvement from the baseline while allowing institutional learning that can benefit the broader field.

These intensive efforts to benefit the students least well served by the educational system positively impact all students, provide a starting point for school teams who want to work on systemic problems that can feel too big to approach, and create accessible proof points for spreading efforts among members of school communities less inclined toward the work of innovation. **In the experience of the NIC, focusing on serving the students positioned furthest from opportunity both broadened and deepened the impact of the improvers, while galvanizing commitment to the effort.** And, from the perspective of NIC leadership, intensive support for the school faculty members serving students was essential for empowering them to clarify and make dramatic progress toward their goals.

Structures to Promote Learning, Sharing, and Planning

To facilitate such a network restart, network leaders at Marshall Street introduced flexible collaborative structures that enabled network participants to apply research to practice within their specific schooling contexts.

Many of the structures, like much of the refocusing of the network, were a return to the original vision of the network — just adapted for the context of school year 2021–22. The structures described below proved most beneficial to the network's restart.

Onboarding

With nearly half of the NIC participants newly arrived to the effort, Marshall Street began to conduct summer and fall onboarding sessions with teachers, directors, school leaders, and CMO administrators. These onboarding sessions were ultimately standardized into a one-hour session that led to more role-specific sessions for Data Leads, Improvement Leads, and Project Sponsors. Onboarding proved important for establishing a baseline understanding of the network's aim, the basic principles of continuous improvement, and the core practices and tools of the network, as well as the current status of the various public school organizations included in the NIC, the ways in which various roles interacted, supports available to educators, responsibilities of technical assistance providers, personal touchpoints for ongoing support, and role requirements. Onboarding sessions were conducted in virtual settings.

Convenings

The first virtual convening, held at the end of Year 1 in the spring of 2021, proved to be a positive and productive experience for the 138 participants, and it launched a series of collaborative virtual events. The convening was focused on restarting the network in earnest, with CMO improvement teams building project charters, including aims, driver diagrams, structures for ongoing collaboration and data collection, roles and responsibilities, and change management plans.
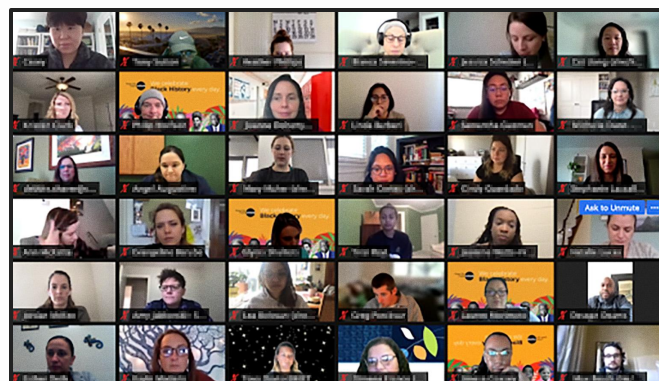
Inspired by a successful initial convening, Marshall Street, the Gates Foundation, and other technical assistance providers planned a fall 2021 virtual convening. Feedback on this second gathering was overwhelmingly positive, yet pandemic fatigue and continuing uncertainty led to inconsistent attendance, and NIC participants struggling to maintain focus over two days of online programming.

Given the positive participant reviews of the Fall 2021 NIC Convening alongside the spotty attendance at the convening sessions, it was clear that the next convening would require significant restructuring.

The winter of 2021–22 was perhaps the most trying time in the life of the networked improvement community. Schools attempted to go back into session in person but struggled to remain open given successive coronavirus outbreaks. The winter delivered not only spikes in COVID-19 outbreaks and school closures but also bouts of unprecedented teacher and school leader resignations.

Due to the ubiquitous staffing shortages and continuous uncertainty in schools across the network, the spring 2022 NIC convening not only had to be held virtually, but also needed to be responsive to the perpetually changing schedules and expectations of school faculty, who regularly needed to cover classes for sick colleagues, or who needed to take on administrative duties given the challenges of contact tracing and student support.

As a result, NIC leadership redesigned the convening to become a month-long series of training events providing the most essential, targeted training and coaching necessary to achieve the greatest impact for students at a critical time. The Spring Learning Month events were co-facilitated by technical assistance providers and school faculty to consolidate participants' learning by **simplifying and refining driver diagrams**, **developing data routines and tools for improvement**, and **building improvement teams for change management.**

Overview of Spring Learning Month

Launch	Core Content Sessions	Optional Learning Sessions	Improvement Team Retreat
March 7th	Mar 11 - 16th	Mar 18 - Apr 1	Mar 23 - Apr 7

Additionally, integrated coaching ensured that participant time was being used as efficiently and effectively as possible.

In short, the convenings of the second year of the NIC were as well conceived and executed as they could have been given the circumstances. Participant feedback was relatively scarce, but what feedback was received was largely positive, with a few negative reviews at the particular session-level. While participants reported feeling supported and were appreciative of the flexible, personalized, and responsive structure of the Spring Learning Month, attendance was lower than at the initial convening, and it was obvious to convening organizers that virtual convenings were becoming increasingly burdensome and ineffective for all involved, CMO participants and technical assistance providers alike.

Learning Tours

The mixed results of the Spring Learning Month had been anticipated, given the pressures on school faculty. What's more, participants were expressing a desire and readiness to meet in person to learn, collaborate, and see examples together. So the Marshall team, working with Sarah Chandler of Purposeful Impact Consulting, organized a pilot in-person event — the Los Angeles Learning Tour — that was integrated into the Spring Learning Month programming. This pilot, opt-in learning tour occurred as schools were returning to classrooms with hybrid policies and masking. It was specifically focused on co-teaching, a major area of interest for the NIC. The learning tour served as a chance to bring members of our network together to see models of excellence and to build knowledge to catalyze their improvement efforts, giving them ideas to take back to their own settings.

Learning Tour participants debrief observations and discuss ideas to take back to their school communities.

The tour was attended by 21 participants from across the NIC, and participants were able to visit two national models of inclusionary learning environments: WISH Charter Schools and CHIME Institute. Additionally, attendees spent time at STEM Prep, a leading charter management organization and network member who was working on improving co-teaching practices within their improvement efforts.

This [first learning tour](#) was so successful that Marshall Street and the Gates Foundation decided to extend the learning tour series. Additionally, participants in this first learning tour reported direct impacts of their time spent at WISH, CHIME, and STEM Prep. Summit Public Schools, a NIC participant, reformulated their special education strategy in the NIC as a result of their engagement in the first learning tour. Individuals across the network — including leaders at Green Dot, Collegiate Academies, STEM Prep, STRIVE Prep (now Rocky Mountain Prep), KIPP Northern California, and Summit — formed collaborative partnerships that endured throughout and, in some cases, beyond the NIC.

Members of the Networked Improvement Community (NIC) outside of STEM Prep's Math & Science College Prep high school.

School Visits

School visit at Noble Schools

Like in-person convenings, in-person school visits had always been a part of the network's design. Indeed, six of the ten schools in the network received in-person visits from Marshall Street and research team ("RTeam") technical assistance providers before early March of 2020, when the COVID-19 pandemic made travel to schools impossible. However, with school closures in effect throughout the 2020–21 school year, welcoming visitors was infeasible for schools in the NIC. Additionally, immunocompromised individuals in technical assistance roles were unable to commit to in-person activities.

Fortunately, by the start of 2021–22, sufficient will and infrastructure existed to enable the purposeful, safe reinstatement of some school visits. These visits provided valuable context for the technical assistance providers across Marshall Street, SRI, RTI, NIRN, Spark Educational Consulting, the SWIFT Education Center, and Blue Engine. Additionally, in-person activities allowed us to build and deepen relationships, serving as critical touchpoints to reorient the network from the set of temporary process-oriented goals back to our original outcomes for students. When schools were ready, site visits were organized to build CMO improvement team capacity, to deepen the understanding and connections between CMO improvement team members and NIC leaders, to source local data, and to solve problems collaboratively. Where schools weren't ready, Marshall adapted activities to engage with school teams in virtual settings. (See the full CMO Site Visit Guidelines here.)

The in-person experiences offered an important reminder to participants that everyone involved in the NIC was working toward the same goals, while also reestablishing roles, responsibilities, routines, and accountability structures. They led to more productive biweekly coaching conversations and to impromptu "jam sessions," which became relatively unstructured creation and problem-solving sessions between technical assistance providers (organized by Marshall Street's Improvement Advisors) and CMO faculty (organized by the Improvement Leads and/or Project Sponsors).

Professional Learning Communities

With in-person learning opportunities severely limited or altogether prohibited by the pandemic, perhaps the biggest structural bet of the second year of the NIC was the establishment of professional learning communities (PLCs) organized around themes that had emerged from the improvement work of the previous year. The PLCs created for the NIC the sort of catalyzing social structure that is a feature of networked improvement communities attempting to solve complex problems in education.

Not only were PLCs the primary ongoing collaborative structure in which NIC leaders across the network would regularly engage, but they were also a way to force clarity among technical support providers. It was imperative at this point in the NIC's work that technical assistance responsibilities were clearly articulated across the four legs of the improvement chair. Marshall Street was firmly established as the lead of process and coordination of support. The RTeam was in charge of measurement and evaluation activities, and, to some extent, consultative data support for the CMOs. However, the CMOs were in need of content expertise and regular data support beyond the activities of the RTeam.

PLCs, then, became a structure to organize and focus the allocation of expertise within the network for the greatest impact. After the first year of continuous improvement work, the CMOs began to cluster their prioritized change ideas for Black and Latinx students with disabilities experiencing poverty around **four themes**:

1. Literacy support, particularly for nonproficient readers
2. Postsecondary transition planning
3. Establishing multi-tiered systems of support (MTSS)
4. Co-teaching structures and routines

For each theme, Marshall organized a PLC, and each PLC was designed to maximize collaboration that bridged theory and practice across the four legs of the improvement chair. Thus, a Marshall Street process guide, a content expert, and a team of CMO faculty were present at every PLC meeting to delve into relevant research, apply that research to practice, examine progress data to test efficacy, and codify the best practices to share broadly. Blue Engine, based in New York, served as the content expert for the co-teaching PLC.

SWIFT Education Center out of the University of Kansas served as the content expert for MTSS. Spark Educational Consulting served as the content expert for the literacy PLC. Finally, a **Transitions Working Group** was established as a modified PLC facilitated by Spark Educational Consulting, which shared resources and ideas to guide young people into a productive and purposeful life after high school.

Each PLC evolved in unique ways, with co-teaching and literacy growing in their membership over time, while transition planning and MTSS lost members. The PLCs became the containers for meaningful discussions and collaboration among members of the NIC and became the primary place for the development of relationships across the community. Additionally, content experts provided dedicated coaching (alongside Marshall and the RTeam, in their various capacities) for the CMOs in each PLC, and we allocated additional consulting time from each content expert at CMO request. As a result, CMOs reported feeling well supported by the network in their efforts to put research into practice for their students. This work was on display at the 2022 Carnegie Conference, where leaders from Summit, STEM Prep, Green Dot, and KIPP Northern California, alongside Marshall and RTI, collaborated with the improvement community and shared their work.

Finally, the PLCs became an organizational tool for network-wide collaborative events and community sharing. Because the equity-focused efforts of the school organizations were clearly organized into topical areas, school faculty were well positioned to present on their work in PLCs. These sharing sessions were well attended and well rated in part because the work was at the forefront of the field's knowledge. It was innovative. Their work, organized topically but all aimed at dramatically improving outcomes for Black and Latinx students with disabilities experiencing poverty, could transfer contexts and create an emerging set of best practices for students positioned furthest from opportunity. In this way, research-practice partnerships emerged in which practitioners led the charge in an environment of collaboration and creative freedom.
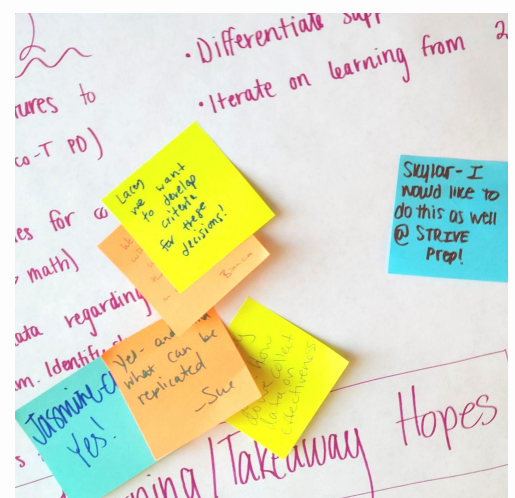
Learning from the IHI Model

One of the most fundamental challenges of any improvement effort, at least in education, is the documentation. Who documents PDSAs? After all, PDSAs are the essence of improvement work. "What works, for whom, in what context?" is inherently a question being asked and answered through the scientific process operationalized by PDSA cycles. The question of documentation is so pedestrian that most of the heady texts on improvement fail to address it. After all, documentation is just writing things down. Somebody should do it. Who? Figure it out. Sounds contextual.

In the second year of the NIC, "Who documents PDSAs?" became an essential and contentious question as school faculty were stretched thin and technical assistance providers shifted gears from responsive coaching to leading change efforts across the network. Our data was clear: school faculty were not documenting. In Fall 2021, fewer than 60% of PDSAs were completed, with an average quality rating below 50 on a 100-point scale. In spring, completions improved slightly, to 71%, but the average quality rating deteriorated to just 35.

PDSA Completion and Quality Over Time
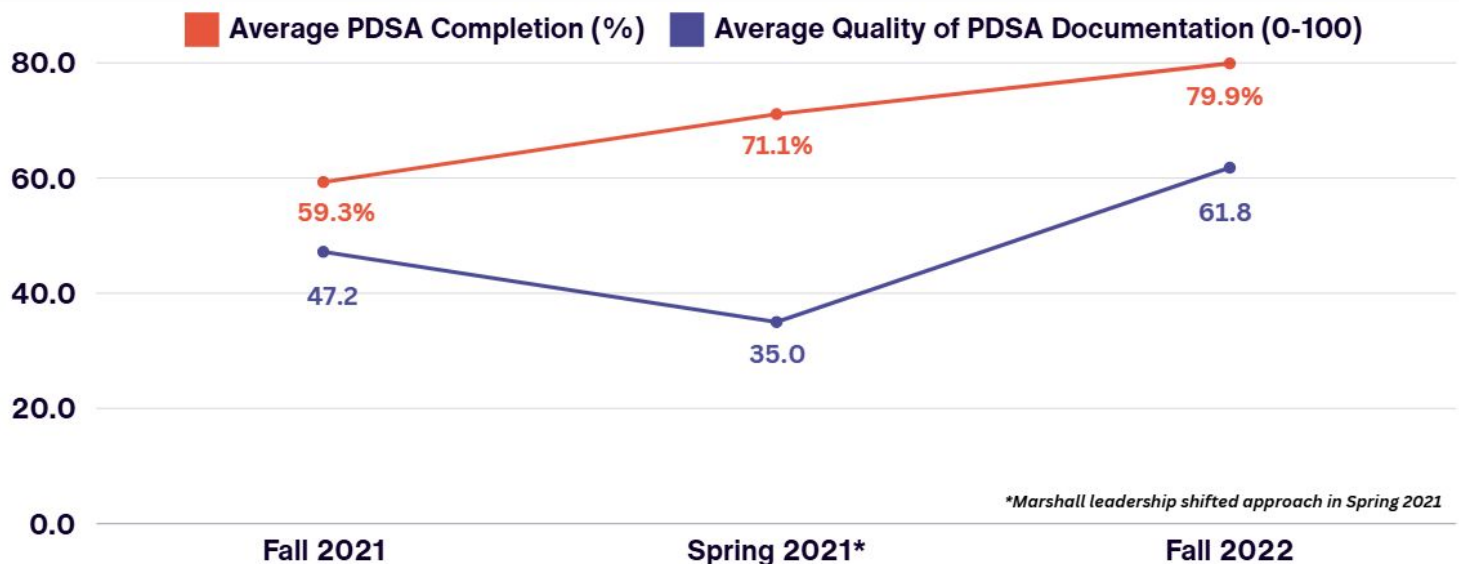
Otherwise enthusiastic Improvement Leads, Project Sponsors, and Data Leads on CMO faculties were digging in their heels when it came to filling out PDSA forms. Those who were willing to start documentation often struggled to complete documentation on what actually happened. One CMO even took it upon themselves to create their own PDSA form because they did not like the standard one provided by Marshall Street (and adapted from the Carnegie Foundation for the Advancement of Teaching's PDSA documents).

In contrast, the RTeam, responsible for measurement and evaluation activities, was insistent about the essentiality of PDSAs. From an evaluation standpoint, a stack of standardized, comprehensive PDSA forms is a gold mine of data. These forms represent the atomic structure of the improvement effort at school sites around the country, and from those atoms are built the full bodies of improvement: The PDSAs feed into the driver diagrams, and those toward the individual organizational aims. In aggregating those aims across the network, we can see progress toward the network aim, and furthermore, we can test the core hypotheses embedded within the network's driver diagram, as well as determine which bets are most likely to pay off at a grander scale.
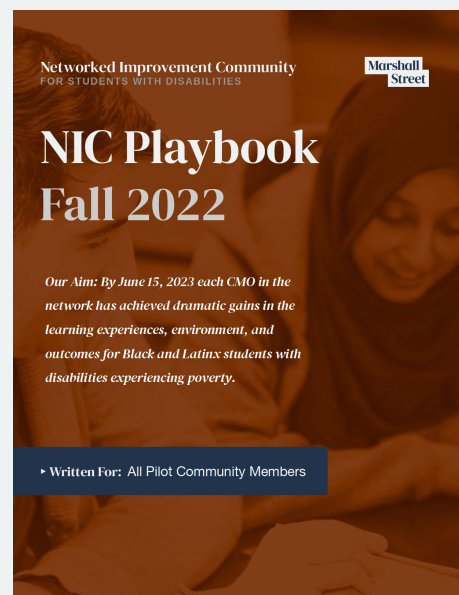
Click to view

Mindsets and habits for documentation were evidence that our approach needed a dramatic change. Essentially, the people best suited to completing PDSAs were reluctant to do them (particularly at the level of thoroughness desired by the measurement and evaluation team), and the people who were most interested in the documentation of PDSAs were pushing hard for them to be done fully, completely, and in a standardized format.

> **"Mindsets and habits for documentation were evidence that our approach needed a dramatic change."**

At Marshall Street, we went searching for answers. On one hand, it made sense to have the people doing improvement documenting improvement. After all, a teacher administering an intervention is best positioned to explain the intervention, how it went, and what happened. Also, much of the PDSA-level data is niche and shifts rapidly from cycle to cycle. How would someone who is not in the classroom, who doesn't have access to the teacher's grade book, even be able to collect the data on the PDSA, much less analyze it?

However, what seemed logical to us was not persuasive to educators, and our efforts to sell PDSAs — "They're great," we said. "They'll help you be more scientific, more analytical," we said. "They're easy and they help you learn quickly!" "Use these PDSAs," we said, "and you'll be a teacher-researcher." — were ineffective.

Regardless, we knew that documentation was a widespread problem across the field of improvement and within our own network. People were deeply invested in the vision of the work and wanted to take action, but were easily pulled away from the discipline of documentation. Without a strong routine for documentation and data to give them feedback on their progress and learning, documentation simply was not motivating. It felt compliance-focused and wasn't well connected to the overall learning structures and routines of the network. We encountered this problem ourselves. When running our own internal PDSAs, we often struggled to document in PDSA form unless we scheduled regular meetings to share findings and take notes. Doing improvement is very different from documenting improvement at the PDSA level, and even now it is unclear whether the goal of improvement science in education is for educators to internalize the improvement process so that they can forever think more scientifically, thereby approaching challenges with the productive spirit of hypothesis testing, or whether it is to forever document findings for the greater good (presuming someone will actually read a bunch of PDSA documents and be convinced of the veracity of the findings).

In the absence of a clear answer, we looked to IHI. All improvement work in the social sector has its origins in IHI, and when Tony Bryk and the Carnegie Foundation began the movement of improvement science to education, they built on their work at IHI to do so.

What we learned is this: The IHI model has two basic functions, each representing a different phase of improvement work:

1. Working intensively with "mentor hospitals" to determine best practices.
2. Scaling those best practices within healthcare.

The work of Marshall Street was firmly situated within the first phase: working intensively with school organizations to determine best practices. But how does IHI get hospitals to test and document their best practices?

They don't.

IHI decides what they want to learn. For example, in 2020, IHI decided that it wanted to learn the best practices for admitting patients to hospitals during the COVID-19 pandemic. It put a call out to the roughly fifty mentor hospitals in its network. Some of the mentor hospitals said that they would welcome such a study. IHI chose a few of those hospitals to work with, and they sent improvement teams to each of these chosen hospitals. Once there, the improvement teams worked with local medical professionals to hypothesize, test, and refine their understanding of best intake procedures.
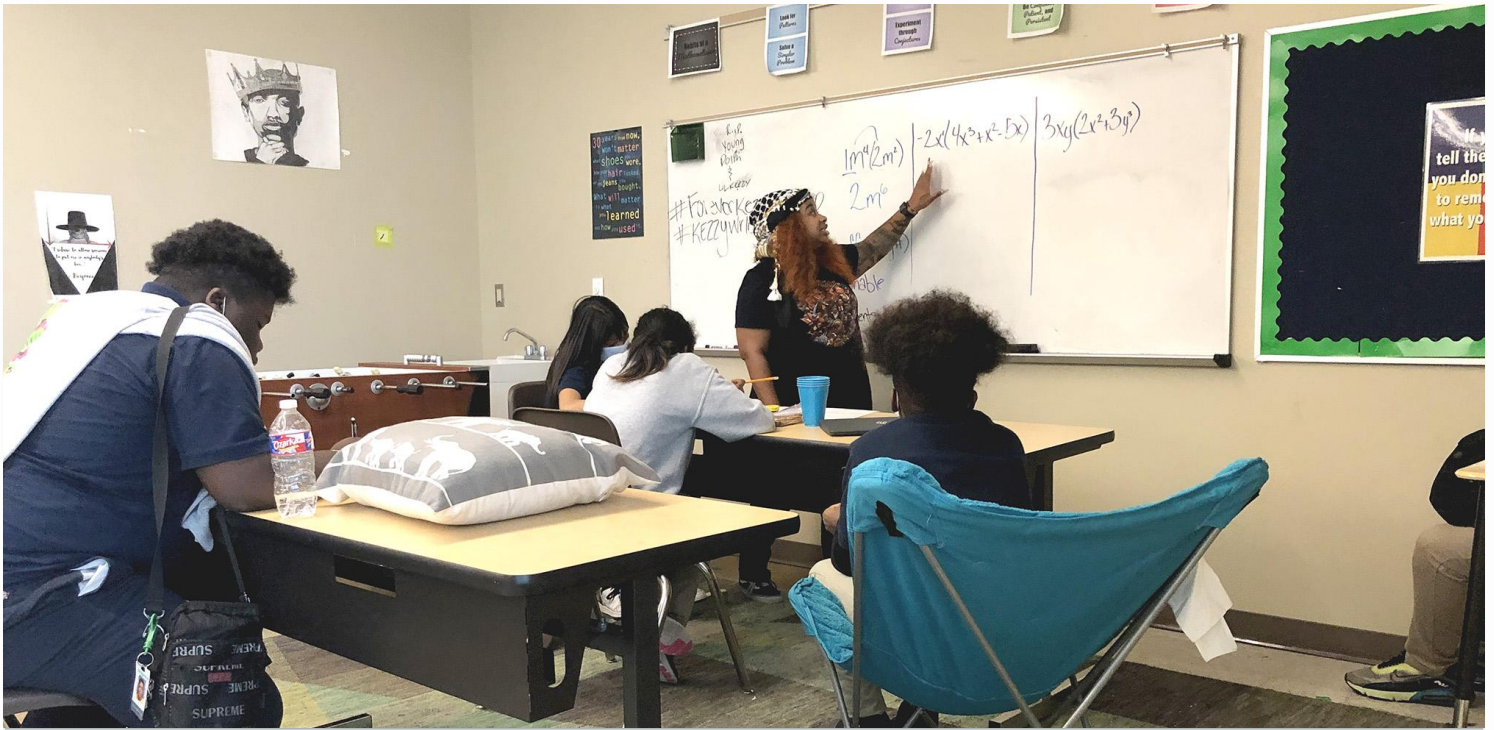
Co-teaching small group at Livingston Collegiate Academy

Much of the testing and all of the documentation is done by the IHI improvement team. The testing is conducted in a real clinical setting, with the participation of the medical professionals in the hospital, but the IHI team is doing the improvement work, and when that improvement work is complete, they move on. Their documented work goes through cycles of revision before it is ultimately handed off to the Breakthrough Series team, who is responsible for scaling the best practices documented by the improvement team.

In education, there is no real corollary to the IHI model. Perhaps John Dewey's concept of a lab school is as similar as it gets, but never has the model been implemented with such discipline and rigor. For the purposes of our NIC, the Marshall Street team decided that we would enact the spirit of the IHI model to the extent possible given our constraints. Specifically, we decided that it was a fool's errand to attempt to convince school-based faculty of the value of PDSA documentation. First and foremost, the job of the site-based implementers of improvement is to teach, to lead, and to coach. Second, they would work with us to plan PDSAs, and then they would enact the changes and collect the data. Once they had done so, we would meet again in a virtual meeting session. In that session, we would ask them about the test, have them input the data, and together, plan the next testing cycle.

Through this process, we found a middle ground. While we weren't well positioned to go into schools across the country, enact and document changes, and create standardized written records of the work, we also had far more time and incentive to document and organize PDSA cycles than school-based faculty. This arrangement meant that our documentation wasn't as perfect as the measurement and evaluation team would like, but it also meant that we were able to bridge the gap between practice and research in a way that captured results in good-enough form while honoring the time and engendering the goodwill of teachers, leaders, and coaches on busy school sites.

Looking Ahead
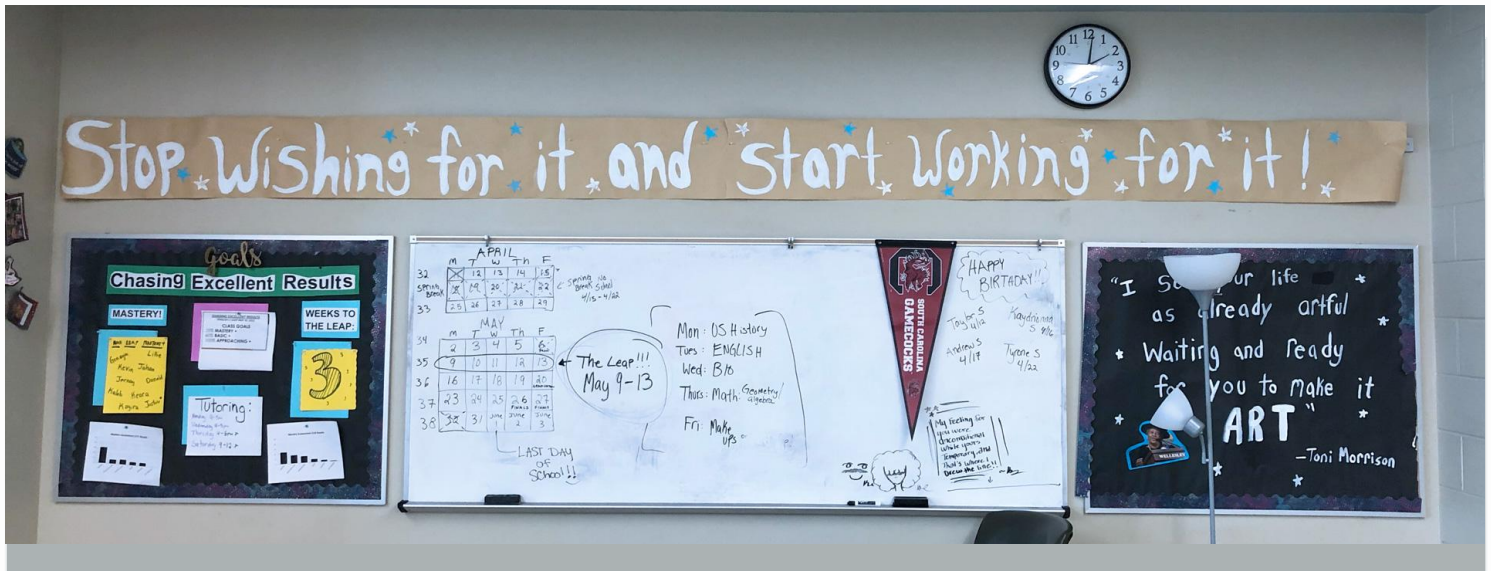
As we headed into the third and final year of the NIC, several questions loomed before us:

1. How do we capitalize on the momentum of Year 2, in which we refocused the network on broadening the improvement team's reach, deepening the impact in the organization, managing change, and initiating formal improvement processes (including PDSAs)?

2. How do we engage senior leaders in the school organizations in order to create focus, political will, and ongoing support for improvement teams going into the final year of the engagement?

3. How do we institutionalize the changes that are demonstrating promise for Black and Latinx students with disabilities experiencing poverty?

4. How do we build capacity across the network to continue "doing improvement" beyond the network's existence?

5. How do we ensure that we capture more in-person convening time and use it most effectively?

6. How do we set up the continuation of the NIC's work so that many more students and educators can benefit from the emerging best practices?

Across the network, there was tremendous potential. Data systems and the resultant interventions across developing multi-tiered systems of support (MTSS) were showing gains for students in the target population. Transition planning interventions were startlingly effective, but tremendously difficult to spread and scale. Programming for students diagnosed with emotional disabilities seemed transformational, but capturing compelling data on the program's efficacy was proving to be elusive. Co-teaching arrangements were demonstrating excellent results for both students in the NIC's priority population and for all students — the essence of targeted universalism — but more time was needed before these practices could be effectively codified and shared, particularly given the resource-intensive nature of co-teaching structures.

The third and final year of the NIC promised to be a pivotal one, and whether it would allow the network to meet its grand ambition of making dramatic gains for students — or whether we were to fall short of that aim — would depend greatly on the changes and challenges we faced in Year 2. Did we do enough to develop schools' capacity to spread and sustain promising practices? Did we make the right moves in response to unprecedented world events? Would our own efforts to better ourselves through continuous improvement serve as a model for school partners? The results and achievements of the NIC's third and final year would answer all of these questions.

Acknowledgements

You can read our first publication in this series, *Beyond Trust Falls: Launching the NIC,* here. The third and final publication will be released in winter 2024.

About Marshall CoLab
Marshall CoLab is dedicated to improving teaching and learning for students furthest from opportunity. We bring together communities of educators, instructional coaches, and experts to co-develop and implement evidence-based practices and make them available to all schools.
Using the tools of continuous improvement – the science of getting better at getting better – we support educators along the path from theory to transformation to achieve lasting change. Our IGNITE Network is a coalition of schools committed to making dramatic gains in the experiences, environments, and outcomes for students at the intersection of race, class, and ability. Over two years, these schools will implement and refine practices that lead to positive outcomes for students with disabilities. Learn more here.