

Archived Information

Interim Evaluation of the WestEd Regional Educational Laboratory

I. Brief Overview of Laboratory

The interim evaluation of the Western Regional Educational Laboratory (WestEd) was held at the Laboratory's headquarters in San Francisco, CA from April 12 through 16, 1999. This reviewer's report represents a synthesis of a vast amount of information from diverse formats obtained both before and during the site visit. Prior to the site visit, this reviewer read and took notes on all written documents provided that were mapped to the eight evaluation questions and surfed several WestEd websites: the policy website, (www.wested.org/policy); the extensive charter schools website, (www.uscharter-schools.org); the Promising Practices in Assessment Data Base (www.assessment.wested.org/ppad); and the Technology Planning Toolkit (www.wested.org/tie/techplan). While attending the USDE sponsored US Charter Schools National Conference in Denver (March 14-17, 1999), this reviewer examined the Assessment Toolkit 98 (displayed at the McREL booth) and spoke with conference participants regarding their perceived benefits of the Charter Schools website. During the site visit, this reviewer collected data from additional resources including (1) multiple presentations by WestEd staff, (2) interviews with governing Board members, partners and clients of the Western Assessment Collaborative and Kyosei, the Nevada State Strategy, the OERI Program officer, and representatives of Marin City Families First, (3) verbal question and answer clarification sessions with select representatives of WestEd programs, and support documentation provided in response to the fact finding Q and A sessions, and (4) several point-counter point style discussions with evaluation panel members.

II. Implementation and Management

A. To what extent is WestEd doing what they were approved to do during their first three contract years?

1. Strengths

WestEd exceeds expectations in carrying out the scope of work for most projects and producing the deliverables detailed in their contract, 14 contract modifications and annual updates. The two notable exceptions are within the Task 2 (Development and Applied Research) scope of work and are the two multi-faceted initiatives Whole School Reform and Language and Cultural Diversity. Within Whole School Reform, WestEd was unable to adapt and implement the Johns Hopkins University's School transformation models, Success for All and Roots and Wings, because the owner-developer decided to decentralize these models themselves. The Language and Cultural Diversity initiative, WestEd's plan to create and disseminate adaptive packages of professional development strategies and materials around best classroom practices, cross cultural understanding, and equitable assessment along with the development of model support systems for paraprofessionals who share the students' culture is admirable and ambitious, but unfortunately, little has been delivered to date. This initiative will likely pick up speed now that more staff have been hired for this work.

WestEd has been masterful in establishing networks, partnerships, and strategic alliances with key stakeholders in the region. An exemplary network is the Western Assessment Collaborative (WAC), a school support strategy focused on using accountability to change the culture of the school system. Another is the Nevada State Strategy which includes the development of academic standards, assessment systems matched to these standards, and technology planning and implementation. It is important to note that the development of K12 standards in Nevada was a direct response to a REL mandate to assist states in the region in implementing school reform. WestEd has other partnerships

of merit including, to mention only a few more, the Kyosei partnership, Southern CA Comprehensive Assistance Center, BASRC-Facilitators Networks, and partnerships with the Arizona Department of Education.

WestEd has been able to use staff, technology, infrastructure, and facilities to both accomplish more work and conduct REL activities more efficiently. WestEd has a strategy for and has been selective in seeking out and obtaining external resources to enhance their work (See Proposal Development Capacity Assessment Checklist). In addition to internal resources, WestEd has been able to leverage funds from other agencies and other in-kind resources (e.g., staff, technology, infrastructure, facilities) to positively impact the work conducted under the REL contract. WestEd established partnerships and collaborations with the appropriate agencies and organizations to maximize the value of joint interventions and products. WestEd has made great strides to engage all the relevant parties that one would expect to be involved given the limitation of resources. The collective data sources across programs confirms that WestEd has played multiple appropriate roles (e.g., convener, initiator, trainer, moderator) in their collaborative relationships to accomplish the intended goals.

2. Areas of needed Improvement

Board areas of needed improvement include: communication, clarification, maintaining balance, and outreach.

3. Recommendations for improvement

1. Enhance internal communication and coordination to reduce duplication of effort across programs.
2. Clarify for customers what WestEd is and the full range of products and services provided.
3. Balance knowledge of WestEd's work with its capacity.

4. Balance local and regional concerns.
5. Increase the development of alliances and consortia among LEAs who are receiving increased funding to improve the efficiency of the assistance WestEd provides.
6. Continue to encourage more frequent on-site contact with the OERI Program Officer.

B. To what extent is WestEd using a self-monitoring process to plan and adapt activities in response to feedback and customer needs?

1. Strengths

The March 98 Board item on quality assurance presents ten diverse modes intended for use for WestEd programs: formal advisory groups, sensitivity review panels, content review panels, external reviews by partners, clients, and consultants, internal peer reviews, formal internal evaluations, field testing, and telephone interviews. However, this reviewer has concerns about the degree to which these QA strategies have been fully implemented and which are used for what products and services. WestEd was apparently similarly concerned and, began to draft a product evaluation process titled *Product Quality Assurance and Marketability Review* for products in three category levels.

Regarding the site visit itself, there was clear evidence that WestEd's detailed planning and activities for the USDE third year interim evaluation included input from knowledgeable "critical friends" and a simulated site visit. There was also substantial documentation that Board members provided input at multiple-points indicating responsiveness to regional needs and oversight to the translation of those needs into a updated plan [see Example of needs assessment, replanning sequence in 1998: Needs assessment summary (June Board item); Portfolio Review notes (June Board meeting); Updated Plan Draft summary (September. Board meeting); Minutes of September. Board discussion; Updated Plan revised].

2. Areas of needed Improvement

WestEd might use additional measures for assessing impact on customers and use these data to more completely inform decisions regarding capacity building initiatives.

3. Recommendations for improvement

1. Evaluate the impact of professional development on participant **achievement**. Self report data of participants' satisfaction and perceived benefits is valuable, but not sufficient to inform design of quality "adaptive" professional development activities. Once data documents that participants (e.g., teachers) have learned, conduct follow-up evaluations (e.g., a structured observation done by trained raters) to determine how and to what degree these participants are using their newly acquired knowledge, skills, and abilities in their classroom practice. From that point, evaluate how these changes are linked to improved student learning. A non threatening measure of participant achievement is the "problems-for practice" self assessment (SA) which both reinforces skill development, and, if collected and scored by error type, provides insights into the effectiveness of instruction for a given group of participants. An example of one SA for an item writing workshop for teachers would be having teacher-written flawed and refined tests items adjacent to each other and asking participants to select the better version and support their selection by identifying the needed improvements in the flawed items. Results might, in turn, be part of the needs assessment data to inform further staff development planning on the topic of item writing and revision for another group with similar prior knowledge.
2. Disseminate work to a broader audience by expanding access on the Internet.

III. Quality

To what extent is WestEd developing high quality products and services?

1. Strengths

Considerable evidence documents that WestEd produces high quality products and services. Customers who participated in the interviews from the Western Assessment Consortium and the Nevada State Strategy confirm that WestEd professionals are regularly called upon for their expertise in planning, development, and implementation. Staff meeting notes (WAC's May 1998 Accountability Dialogue) proclaim that great "co-creation" strategies are coming out of the Arizona work. And to establish more systematic and sustained school improvement efforts WestEd developed

and maintained longer term arrangements with education support agencies. WestEd is proclaimed to be a source of expert information (e.g., 15 SCCACs identified WAC as providing the best technical assistance.). WestEd has also provided expert consultation to others at the national (Kentucky), regional, or state level.

WestEd has made generous use of the Internet to develop and disseminate its products and services. The technology website (www.wested.org/tie/techplan) provides assistance with technology planning that is comprehensive and directly linked to student standards. The Policy Website (www.wested.org/policy) provides recent resources and research on critical and controversial topics. The most comprehensive website on charter schools (www.uscharterschools.org) covers everything most would want to know about starting a charter school. The Promising Practices in Assessment Data Base (www.assessment.wested.org/ppad) references the Assessment Toolkit98 and other publications likely to be helpful to practitioners.

With the exception of their Language and Cultural Diversity Program, WestEd has incorporated to a great degree the latest widely accepted findings in the field into their work. Client testimonials confirm that WestEd's products and services are consistent with what would commonly be accepted as best practice in the field. WestEd has used well tested and documented approaches for services being implemented in the field. WestEd products and services are based on well-tested models and approaches that have been shown to be successful. WestEd obtains expert advice to inform products and services.

2. Areas of needed Improvement

1. WestEd has not always completely surveyed the relevant literature as a foundation for developing products or services (e.g., assessment accommodations for limited English proficient students).
2. WestEd should rethink the value of conducting more research and documenting the impact of their interventions with multiple measures.

3. Recommendations for improvement

1. More sharply target and tailor information sources (e.g., publications and workshops) to the diverse needs and prior knowledge of their audiences. A workshop in preparation such as “What is Good Data?” is a valuable overview and good beginning, but alone it will not likely result in the recognition of good data, or, more importantly, result is participants being able to generate items and instruments that yield “good” data.
2. Publish more frequently in refereed journals to expand WestEd’s visibility across the nation. Practitioner oriented publications might be more relevant for most of the applied research currently being conducted.
3. More effectively market to individuals, agencies and organizations, particularly within the region, WestEd’s vision and the products and services resulting therefrom.
4. Address early in the design and development of any high-stakes large-scale assessments (e.g., the Nevada assessments) issues which are typically delayed until much later, but have profound cost, quality, and utility implications. Two important ones are test disclosure and reporting of assessment results. Regarding reporting, at least three issues should be addressed early: (1) whether the performance standard desired will be a single cut score per test, proficiency levels, and/or proficiency levels anchored with behavioral descriptions defining what students at each level know and are able to do; (2) whether data can be disaggregated not only by sub-populations (e.g., gender and ethnicity), but by subsets of content (e.g., content domains, outcome scale scores), and/or by categories of performance (e.g., number and percent of students at/above the cut score and within each proficiency level); and finally (3) whether performance reports (school and individual student’s profile) will capture multiple measures (e.g., state and local school system data) so that scores on high-stakes large-scale assessments are interpreted as part of a data mosaic to enhance the probability that disproportionate resources are not eventually focused on only those reform standards that can be reliably and validity measured on state-mandated assessments.
5. Stress to all stakeholders that academic standards and the state and local assessments designed to measure them are evolving products that should periodically be reviewed and revised as knowledge expands and changes. Plan early for cyclic reviews of standards, perhaps every five years, so that there is as seamless as possible revision of associated

district and state assessments intended to measure them.

IV. Utility

A. To what extent are the products and services provided by the WestEd Laboratory useful to and used by customers?

1. Strengths

WestEd has provided products and services of sufficient size, scope, duration and intensity to contribute to school improvement and student success efforts. The Nevada State Strategy documents that WestEd offers on-going training and support to sites undertaking a major reform initiative. WestEd typically does not offer single-session training opportunities to introduce basic information that do not require follow-up because these are unlikely to sustain results.

Glowing testimonials confirm that WestEd has established a rapport with its users that facilitates open and ongoing communication. There is evidence that WestEd offers follow-up services when appropriate to the extent that resources permit. WestEd provides new opportunities for users to take advantage of the Lab's products and services. Products and services were designed in a user-friendly way with consideration given to the resources (e.g., technology) available to the customer and were developed by WestEd to have practical applications in the classroom. For example, WestEd's Information Resource System employs a technology based delivery system adapted to the regional needs of customers all of whom have access to new technology, but some are "low tech" and other are "high tech." Testimonials at the US Charter Schools Conference provided compelling evidence that WestEd's Charter Schools Website is actually being used by customers nationwide.

2. Areas of needed Improvement

WestEd should continue to strive towards greater dissemination of quality works, continue to address concerns related to scaling up, and collect data on how the products are being used by the customers.

3. Recommendations for improvement

In the assessment arena, training modules should be designed to build on one another to include the level of detail that should ensure the long term intended goals. For example, reliability and random error must not only be linked to validity and systematic error, but to obtained scores and the standard error of measurement. In “What is Good Data?” there is no mention of reliability’s relationship to error and obtained scores and the implications for retesting.

B. To what extent is WestEd focused on customer needs?

1. Strengths

WestEd has conducted appropriate outreach and marketing activities within the region to locate the individuals, and organizations that one would expect to see as customers of the Lab. WestEd has tracked requests for materials (e.g., 2000 copies of *Standards: From Document to Dialogue* sold), services (e.g., participant lists for workshops) and website visits (e.g., over a half-million hits on the *uscharterschools.org* site). The tracking system for website hits does not contain information about who (e.g., classroom teachers, administrators) is using which Lab services. WestEd has also involved Arizona customers in the development process (e.g., co-creation) to ensure that products and services are designed to meet their needs. Products and services were piloted with customers so that feedback was incorporated before the product or service was finalized.

2. Areas of needed Improvement

Particularly in the specialty area, WestEd should provide additional products and services

tailored more specifically to the types of assessment information that different stakeholder audiences need to know.

3. Recommendations for improvement

1. Emphasize the impact (political and technical) of alternative assessment designs, the overall complexity of assessment design, and the interrelationships among decision points (similar to degrees of freedom) to enhance understanding among stakeholders that all accountability decisions have benefits and trade-offs. Offer, in addition to policy briefs, a resource book composed of lists of some of the benefits and trade-offs of major decision options/issues. If one wants X (e.g., many constructed response items on a test) then... Y (greater engaged testing time and/or lower generalizability of results) is likely to result.
2. To enhance stakeholder ownership of state assessments intended for use in graduation decisions, invite non educators such as the media, business community, board members, legislators, parents, etc. to participate in a “mock assessment administration.” This “we have nothing to hide” approach can be invaluable particularly when assessments are composed of items intended to measure higher-order thinking skills such as clusters of multiple-choice items related to one or more stimuli and performance assessments. A public sample release form or even a secure test form has been used successfully in at least one state for this purpose. If the later is used, participants should be asked to sign a non-disclosure form. For a follow-up session, participants might be acquainted with the process of score reporting and interpretation. Actual participant scores aggregated from session one, to be non threatening, should motivate stakeholders to return for the second session.
3. Encourage administrators to permit **voluntary** professional development, linked to school improvement plans, so that teachers, principals, and central office staff may create individualized professional development plans composed of at least some, if not all, “elective” continuing education opportunities.

V. Outcomes and Impact

A. To what extent is WestEd’s work contributing to improved student success, particularly in intensive implementation sites?

1. Strengths

WestEd seems to be aware of the need for a plan for a sound model to document and support the contribution of its work to student success over time. There seems to be a documented rationale

that indicates that the work is likely to have an impact on student success, however, no evidence was provided in the data sources and interviews of direct impact on student achievement. According to the Board Report, WestEd expects to examine intended outcomes at the appropriate times. Perhaps in the long term plan as evidence accumulates, WestEd might consider having meta analyses conducted by external consultants.

WestEd has promulgated findings via multiple modes: presentations at annual meetings of over 13 national & international associations, plus their state affiliates, plus at the Improving America's Schools conferences; publishing books with four publishers; and creating multiple diverse websites, and training workshops. However, considering the superb quality of many of WestEd's products and services, it is regrettable that the dissemination has not been greater, particularly in the area of the specialty. Based on the materials reviewed related to assessment and accountability, it is doubtful that WestEd contributed substantively to expanding the knowledge base by addressing gaps in knowledge.

2. Areas of needed Improvement

1. WestEd should seek direct evidence of impact on student achievement. When this is not feasible, WestEd should obtain milestone or benchmark data related to enabling behaviors (i.e., the effectiveness of professional development for teachers).
2. WestEd might also explore the degree to which the affective domain (values, attitudes, and beliefs, aka the "self system") can produce substantial improvements in student achievement (e.g., the cognitive domain) within the disciplines, as well as students use of the processes within metacognition and cognitive systems.

3. Recommendations for improvement

Complementary data gathering strategies for validating assessment applications might include:

1. A survey of teachers in content areas of high-stakes large-scale assessments on the degree to which they perceive the state test scores reflect what is actually happening in the classroom.

2. Focus groups to determine how policy makers (usually non technically trained) are interpreting test data and using it to inform decisions and whether their impressions are supported by the data provided.
3. A survey of tested students on their perceptions of the degree to which the standards-based reform accountability system is influencing their academic behaviors and outcomes (e.g. motivated to study more/less, improved learning in tested vs. non tested subjects, more cheating, etc).

B. To what extent does WestEd assist localities to implement comprehensive school improvement strategies?

1. Strengths

WestEd incorporates potential for scaling up into products and services during the development process and invites appropriate partners to participate early in the process to enhance ownership. Products and services were delivered in ways that make them accessible to a wide audience, although in large territories such as Nevada, more intense effort would be desirable. WestEd has provided applied research-based information, but does not conduct quasi-experimental studies that attempt to attribute impact to specific interventions. WestEd formulates well-tested models and strategies and has worked with states and localities to customize models to meet their specific needs. WestEd demonstrated flexibility in adopting different strategies to meet the varying needs of states and localities. Within the limitations of resources WestEd has provided a broad array of materials and essential technical assistance to states and localities throughout all stages of the school improvement process (e.g., planning, implementation, follow-up). Although WestEd has facilitated widespread access to information on best practices within the region, not all resources are readily accessible to all interested parties who desire them (e.g., clients in Nevada). WestEd has sponsored workshops and conferences (Accountability Dialogs) where successful school improvement efforts are showcased. WestEd's websites (e.g., www.uscharterschools.org;

www.assessment.wested.org/ppad) include useful information on how to facilitate comprehensive school improvement. WestEd made referrals and convened groups within the region to facilitate transfer of knowledge about comprehensive school improvement. Also, as indicated previously, WestEd has been masterful in developing appropriate strategic alliances which are composed of the right people to accomplish the objectives of the work. According to participant logs, WestEd made an effort to include parents, business representatives in the alliance and an heterogeneous perspectives in the region. WestEd collaboratively built capacity of partner sites by providing technical assistance, training, and support to enable partners to identify and solve problems on their own. WestEd produced policy briefs to inform policy decisions and established relationships with a broad spectrum of stakeholders to be in a position to provide input in policy debates or development. The Governor of Nevada called upon WestEd for information as did the Superintendent of Public Instruction.

2. Areas of needed Improvement

1. WestEd could do a better job of distilling major findings from research-based literature and making them available in ways that are more understandable and accessible
2. If WestEd has not worked with schools or districts to examine their current budget and staffing and helped them identify ways that changes could be made to facilitate comprehensive school improvement, they might consider doing so.

3. Recommendations for improvement

1. Experiment with “standardizing” the role of coaches in capacity building models to maximize impact throughout the system. Collect data in a effort to determine why some “coaching” behaviors are more effective than others for specific audiences. Context matters. To sustain impact, include principals as coaches.

C. To what extent has WestEd made progress in establishing a regional and national reputation in its specialty area?

1. Strengths

WestEd has focused on Authentic Accountability not Counting and asks not only “how many” kids are successful, but which ones. WestEd is noted for its Career Preparation Assessments: a high school portfolio which employs interdisciplinary performance assessments which give students powerful tools for demonstrating proficiency of essential career preparation skills to employers. For material that does not lend itself to journal publications, WestEd has disseminated its work through other means (e.g., its websites). WestEd receives requests for services, products, conference presentations (at AERA) related to the specialty area—inside and outside of the region (Kentucky).

WestEd is a recognized leader in its specialty area especially by stakeholders in the Nevada State Strategy. With the exception of their involvement with the Kentucky test development, it is unclear how well known WestEd is to school based personnel outside of the region. WestEd staff has been asked to make numerous presentations at major conferences (e.g., AERA), but few according to the data reviewed, have been in the their specialty area of assessment. However, the Nevada Governor did seek input from WestEd when considering policy issues related to the specialty area. WestEd, in partnership with the 9 other RELs, enhanced and disseminated the Assessment ToolKit98 and related services inside and outside of the region. Although WestEd has developed and implemented a dissemination plan that targets the relevant audiences, nonetheless, many clients reported that they were unaware of what WestEd does and for whom.

2. Areas of needed Improvement

1. Despite an intentional focus on applied research, policy briefs, and “How-To” guides, WestEd should publish more extensively in some leading journals in educational measurement. Perhaps a practitioner oriented publication like *Educational Measurement:*

Issues and Practice would be more relevant for current work, than the *Journal of Educational Measurement* or *Applied Psychological Measurement*.

2. WestEd's specialty area products and services need to be more easily accessible and available. Many customers indicated that they were unaware of what WestEd is and does.

3. Recommendations for improvement

1. Create additional focus area list serves to which interested customers with Internet access (e.g., Nevada Technology Project) could subscribe for updated information and advertise them on larger list serves (e.g., AERA divisions) to research a wider audience of stakeholders outside the four state region.

VI. Overall Evaluation of Total Laboratory Programs, Products, and Services

WestEd is a success story, an outstanding Regional Education Laboratory. They are working on many cutting-edge promising practices which have the potential to have tremendous positive impact on students. Like every large organization, they have some concerns which they need to address to ensure total quality. The three major ones are related to research and development issues, assessment issues, and the progress of their Language and Cultural Diversity Program.

VII. Broad Summary of Strengths, and Issues to Consider

1. Strengths

WestEd's strengths are numerous. First, and foremost, they have a multi-talented, energetic, caring, and motivated staff with an impressive shared goal: "Unrelenting commitment to positive outcomes for children." By harnessing this talent and by leveraging funds from other sources, they have accomplished an enormous amount of work with relatively limited federal dollars. They are engaged in cutting edge projects, for the most part, which are on track and within expected timelines. When modifications to the proposed work has occurred justifications have been convincing. The work quality is the direct result of the staff talent combined with a rigorous quality assurance program and a caring involved governing board. The two signature programs reviewed, WAC and Kyosei and

the Nevada State Strategy, were especially impressive.

2. Issues to Consider: Areas and Strategies for Improvement

Based on the site presentations, interviews, and a review of a small sample of sources provided by DIR from a domain of considerable size, the major areas of concern appear to be:

1. The enhancement of internal communication and coordination to reduce duplication of effort across programs
2. The production and dissemination of peer reviewed work in refereed journals
3. Clarification for stakeholders and customers what WestEd is and depth and breadth of products and services available
4. Balancing knowledge of WestEd's work with its capacity
5. Balancing concerns within and across the 4 states
6. Intensifying the scope of WestEd's work on Language and Cultural Diversity to enhance their visibility in the field
7. A more systematic and rigorous collection of evaluation data, attending to issues such as sample size and representativeness, response rates, etc., and, finally
8. Supplementing the development of alliances and consortia among local school systems who are receiving increased funding to improve the efficiency of the services WestEd provides.