

VOICES FROM MID SOUTH MIDDLE START:
DEVELOPING LEARNING COMMUNITIES

A REPORT

TO

THE FOUNDATION FOR THE MID SOUTH

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INTRODUCTION

Mid South Middle Start (MS)² upholds three goals: academic excellence, developmental responsiveness, and social equity in schools with middle grades. In order to assist schools in reaching these goals, technical assistance (TA) coaches worked in 24 middle schools in the Delta region of Arkansas, Louisiana, and Mississippi during the (MS)² planning year (academic year 2000-01). These coaches (consultants based in the region) helped school staff members identify school improvement goals, linked school staff to appropriate middle-level resources, helped identify school leaders, and guided school staff through the improvement process. The work of the coaches is closely tied to promoting the three goals of (MS)²: to promote a learning environment that is academically excellent, developmentally responsive, and socially equitable for all students.

The evaluation data presented in this report provide an overview of what took place during the planning year. The report contains three sections: the first presents the voices of the TA coaches; the second presents those of school staff; and the third includes voices from the listserv. Findings are based on coaches' monthly reflection logs and semiannual reports summarizing their involvement with participating (MS)² schools; telephone surveys administered to school staff during the (MS)² planning year; formal and informal interviews with the coaches and management staff; and an analysis of the coaches' listserv.

The purpose of this report is a formative one. Evaluation staff of the Academy for Educational Development (AED) seek to foster reflection about the processes and voices of (MS)² by describing what has occurred to date and how it is related to creating and solidifying the necessary relationships that will reform middle-grades education in the Mid South.

1. VOICES OF COACHES

This section presents coaches' views about their work with schools during the (MS)² planning year. Coaching activities, success stories, challenges and concerns, and lessons learned are highlighted.

Coaching Activities

During the planning year (academic year 2000-01), coaches reported spending much of their time building rapport with administrators and staff in participating schools. Coaches met with administrators and members of newly formed leadership teams.

The coaches' technical assistance activities, as documented in monthly reflection logs, included the following:

- **Running orientation sessions about (MS)² and middle-level concepts** (i.e., mostly teaming and block scheduling) with school administrators (i.e., principals and vice-principals), leadership teams (including teachers and parents), superintendents, and, in one case, a school board.
- **Conducting school site visits** (i.e., touring schools, observing classrooms, and shadowing students).
- **Providing resources** (i.e., Middle Start bibliography, middle-grades journals and books, and information about regional conferences).
- **Facilitating staff work sessions** regarding the timeline and budget for the post-planning implementation grants, the Ten Dimensions, teaming, classroom practices and instructional strategies, adolescent needs, and data analysis.
- **Planning retreats with school staff** (i.e., making the transition to a middle school—developing core beliefs, revisiting a school mission and vision, middle-level program components, and planning and problem-solving barriers to school improvement).
- **Offering advice about the Phase II¹ implementation grant proposal** and developing school objectives.

Monthly conference calls and quarterly meetings that included the coaches and the managers of (MS)² supplemented these technical assistance activities (see appendix). Thus, the primary technical assistance activities brought together coaches and school staff to exchange information, plan, and solidify team relationships.

¹ Phase II is the four-year implementation period of (MS)² in which schools submitting successful proposals will participate in comprehensive school improvement, focused professional development, or comprehensive school reform as grantees.

Primary Contact People

In their monthly reflection logs, coaches referred to the following people as their primary in-school contacts: principals, vice-principals, and members of school leadership teams. The coaches' logs indicated that during the fall 2000 semester, most leadership teams consisted of only one or two people. However, as the semester progressed, more members of the school community joined the leadership team, such as content-area teachers, counselors, librarians, and instructional specialists. These additional members had a positive effect on the teams since they added a wider variety of opinions and concerns and expanded the involvement and buy-in into other sectors of the schools.

Success Stories

Coaches described a number of personal and school success stories in their semiannual reports. Some of their success stories are highlighted as follows.

Success of the Coach

I have forged an outstanding relationship with this school and its principal. It has been a joy to provide resources and a helping hand.

In general, as I reflect on my own experiences as a [coach], I think [this experience] has given me the opportunity to grow professionally in an area where I was not as strong as I was in other areas.

As I reflect on my action plans for my schools, I am progressing towards the goals and objectives I set.

The coaches' reflections indicate where relationships were forged, how coaches developed professionally, and how their professional goals were met.

Success of the School

Some of the faculty who were [originally] very negative, have made some powerful statements that show they are beginning to believe that changes can be made and that we can make a difference.

Some of the teachers are keying in on meaningful learning experiences.

Teachers are beginning to post student work, posters, and sayings in the halls that promote student learning.

Considering there was a new administration [principal and superintendent], who had no background or understanding of middle-level concepts, I feel good to have kept them committed to middle-level change and improvement.

These quotes demonstrate various types of progress in schools, including the beginnings of change in beliefs and changes in actions toward those that promote better student learning and work.

Challenges for Coaches

New educational initiatives often face challenges. The coaches described these challenges in their reflection logs and semiannual reports. Initially, challenges included the schools' lack of support for the (MS)² vision and internal school struggles, such as poor building facilities, low staff expectations of students, and tensions within schools and between schools and district offices. These challenges persisted as the school year progressed and included weak leadership, a need for a shared vision and more buy-in among school staff, and a lack of school resources, as discussed below.

Weak Leadership

There was continued dissatisfaction with district leadership, with coaches reporting that school leaders complained about the lack of support from the district office. One principal felt that his efforts to make changes were being undermined. A coach commented:

There is friction between building administration and district-level administration.

Weak leadership was also evident at some schools. One coach commented that leaders (i.e., principal and superintendent) lacked sufficient awareness or were disinterested in (MS)² and/or middle-level concepts. Two coaches stated:

The principal has a reluctance to embrace the middle school philosophy.

There is a lack of visionary leadership at the superintendent's level.

Lack of Shared Vision and Commitment Among School Staff

Since leadership teams evolved slowly over time, many schools did not have fully developed teams during the planning year (academic year 2000-01). In addition, not all leadership team members shared the same vision or a full sense of commitment. Although participating school staff attended orientation sessions about (MS)², ambiguity surrounding the Middle Start process continued. Thus it was difficult for coaches to move along in their coaching agenda and get team members to follow through with work essential to (MS)² after the coach left the school. One coach commented:

The leadership team was slow to be formed. The leadership in the building has changed in the past two years, and there appears to be some discontent among staff and between staff and the principal. There also exist some philosophical differences and morale issues.

Another coach stated that schools were involved with numerous reform initiatives and had a difficult time focusing on the larger picture of school improvement. For example, one coach said:

Most of the schools really do have so many initiatives going on that it is difficult for them to manage all of them; they cannot see how to mesh them together as one large school improvement effort.

Lack of Resources

Schools often lacked the resources, particularly time and experienced staff, necessary to carry out reform efforts. The coaches stressed the immense time pressures on schools. For example, one school juggled a Southern Association of Colleges and Schools accreditation with grant proposal work for (MS)² Phase II. Other schools conducted standardized testing while they worked on their Phase II grant proposal. Two coaches stated:

The main concern is they [the school staff] have been caught up in the SACS paperwork most of this year. So it's been hard to get them to focus on other things.

Testing is hanging over them—they feel some district-level pressure.

In addition, schools faced the eminent threat of limited staffing. Two coaches commented:

The principal has to share staff with the high school, which makes scheduling difficult, and there are not enough teachers.

Since the principal is leaving in June, there has to be a transition team in place . . . The superintendent has also resigned. . . . Obviously there is staff anxiety.

Despite these challenges, the coaches and schools persisted with planning for reform and gearing up for Phase II activities. The Foundation for the Mid South (FMS) and AED provided them with not only the resources to carry out this planning but also the support and encouragement to devise ways of progressing with (MS)² despite the challenges of leadership, vision, and resources. In the end, all 24 schools received grants to continue with (MS)² in the 2001-02 school year.

Lessons Learned

When asked to reflect about lessons learned—more specifically to lend advice to those attempting new replications of Middle Start—the coaches suggested refining the planning-grant process by employing stricter requirements (e.g., content skills and awareness) for coaches, principals, and schools. Coaches also expressed a need for more accountability and additional meeting time to help build relationships. Coaches made the following comments:

Stricter Requirements During Planning-Grant Phase

Coaches should be experienced with middle-level education . . . the coaches were experienced in bringing about change but knew little about middle-level kids. . . .

Consider principal interviews as part of the grant selection process; [this would] ensure support and knowledge of [(MS)²] principles.

Schools with grants should meet a minimum standard of readiness.

Accountability

Build in accountability to peers.

Build in quality controls/accountability without being burdensome.

Additional Meetings

Set required meetings for principals...and provide leadership training and mentoring for those who need it, so they can see how to effectively implement their grant activities. . . . In my opinion, the leadership is the key to success or failure.

Provide some informal bonding time during the summer meeting [Summer Learning Institute] to encourage coach and school relationship building.

Celebrate the small successes because we all know that success breeds success.

Summary

Coaches indicated numerous ways that they provided technical assistance to schools, ranging from linking school staff to appropriate middle-level resources to workshops on classroom practices and instructional strategies. Coaches encountered facilitators and barriers to their work. They experienced personal growth through their work with schools and saw schools begin to embrace changes in middle-level practices in order to promote the goals of (MS)². However, they also encountered weak leadership, a lack of shared vision and commitment, and limited resources. Yet, these challenges turned into lessons learned, and the process produced successful proposals to progress into Phase II. The most important result of the coaches' work was that they began to strengthen relationships within participating schools and worked out an agenda for reform within (MS)².

2. VOICES FROM SCHOOLS

This section presents school staffs' perspectives about the (MS)² process, especially coaching. During the planning year (academic year 2000-01), coaches spent much time building relationships with their schools and providing technical assistance. This next section discusses coaching activities; those activities linked with school improvement and Phase II planning; staff's frequency of coaching activities; school staff's satisfaction with coaches; and their suggestions for improving the coaching process.

Coaching Activities

The school telephone survey asked school staff to describe the activities of the coaches at their schools. Respondents mentioned the following:

- **Hands-on workshops** were the most prevalent coaching activities mentioned. Examples of these workshops included planning meetings and workshops presenting an overview of Phase II, interpreting Self-Study data, and defining specific middle-level concepts—schools to watch, Ten Dimensions, advisory, teaming, instructional strategies, and the needs of adolescents.
- **Conducting classroom observations** was the second most prevalent activity mentioned.
- **Providing resources to schools**, in the form of coaches' sharing references and articles concerning middle school improvement, as well as directing schools to Internet sites pertaining to middle-level education, was a third coaching activity mentioned.
- **Coaches' attending various school meetings**, such as in-service and community meetings, were also mentioned.

Links Between Coaching Activities and School Improvement Plans and Phase II Planning

(MS)² stresses the alignment of coaching activities with steps towards achieving its goals of academic excellence, developmental responsiveness, and social equity. In an effort to reach these goals, coaches were asked to link their coaching activities with the development of schools' improvement plans and Phase II planning.

School staff members mentioned how closely the coaching activities linked to their school improvement (action) plan and how some coaching activities were linked to their Phase II proposal.

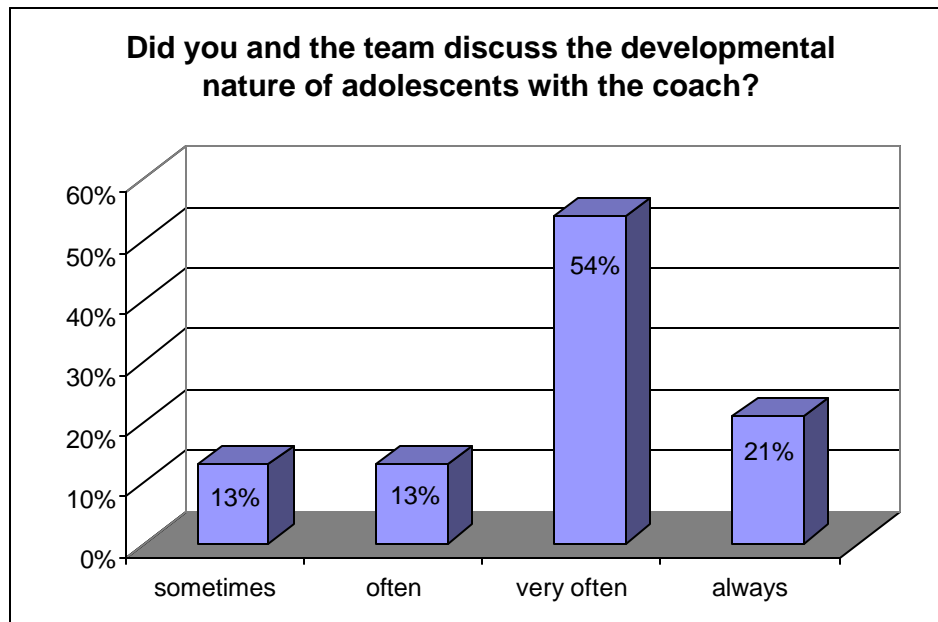
Generally, coaching activities emphasized strategies for school improvement—for example, orienting schools about middle-level concepts and providing instructional guidance in content areas like reading and math. Some links between coaching activities and Phase II planning were evident. These links primarily focused on helping schools understand the rollout and expectations for Phase II. Schools also indicated that they received help with writing their grant

proposals. This was a component of “community building” as the coaches forged relationships within the schools that would aid in the implementation of reform.

Frequency of Coaching Activities

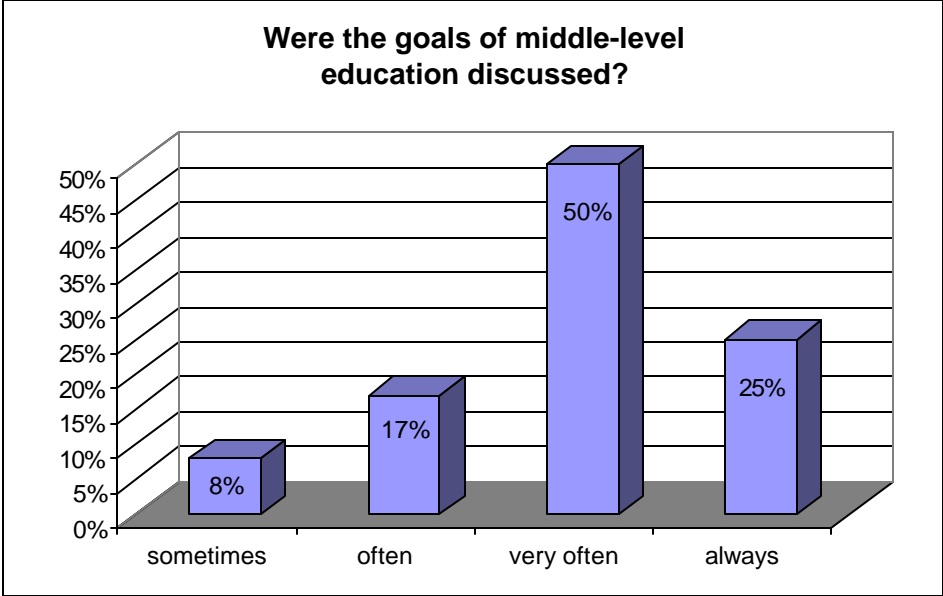
Schools were asked a series questions to find out how often coaching occurred in the schools. The schools' responses are indicated below.

Most respondents, 88 percent, reported discussing the developmental nature of adolescents with coaches on a frequent basis.²

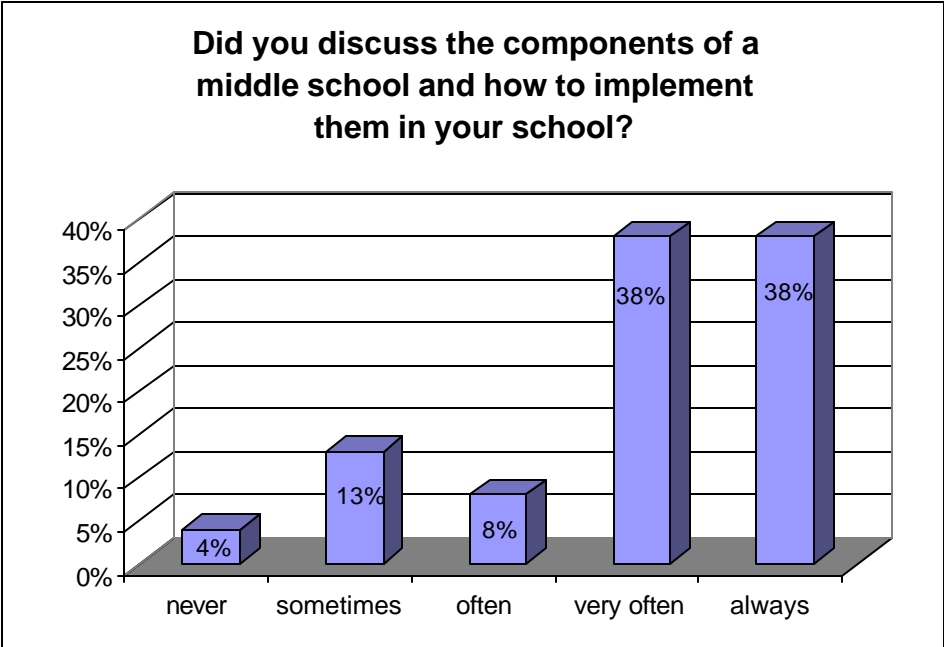


² Frequent=often, very often, and always

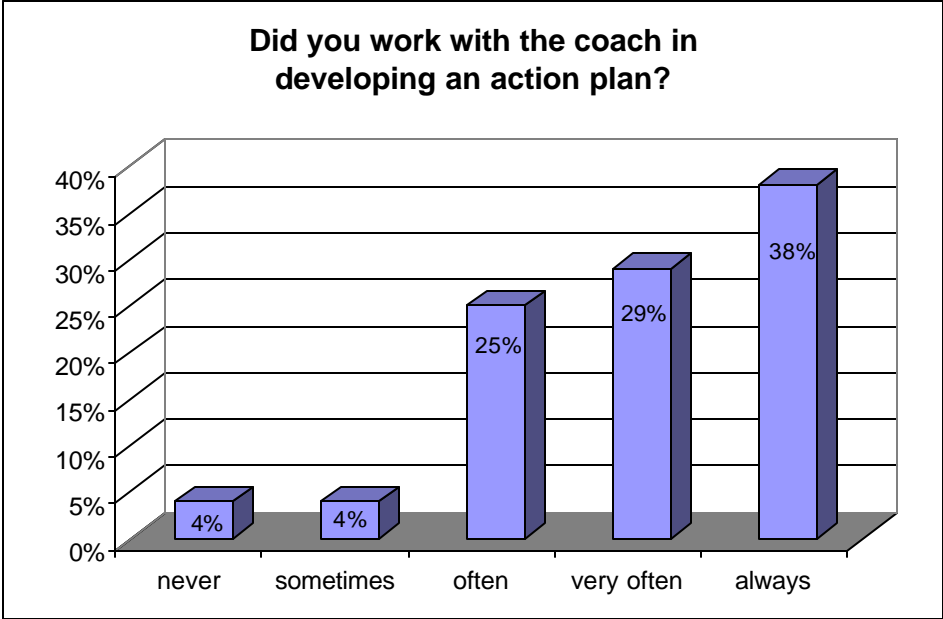
Most staff, 92 percent, mentioned that they frequently discussed the goals of middle-level education with their coaches.



The majority of staff, (84 percent) reported that they frequently discussed middle school components and how to implement them in their schools. However, 13 percent of schools said they had this discussion only sometimes.



A high percentage of staff (92 percent) reported working on their action plans with the coach on a frequent basis.



Satisfaction with Mid South Middle Start Coaches

On the school telephone survey, school staff members were asked if they were satisfied with their coach's work, and generally they were. For instance, some school respondents remarked:

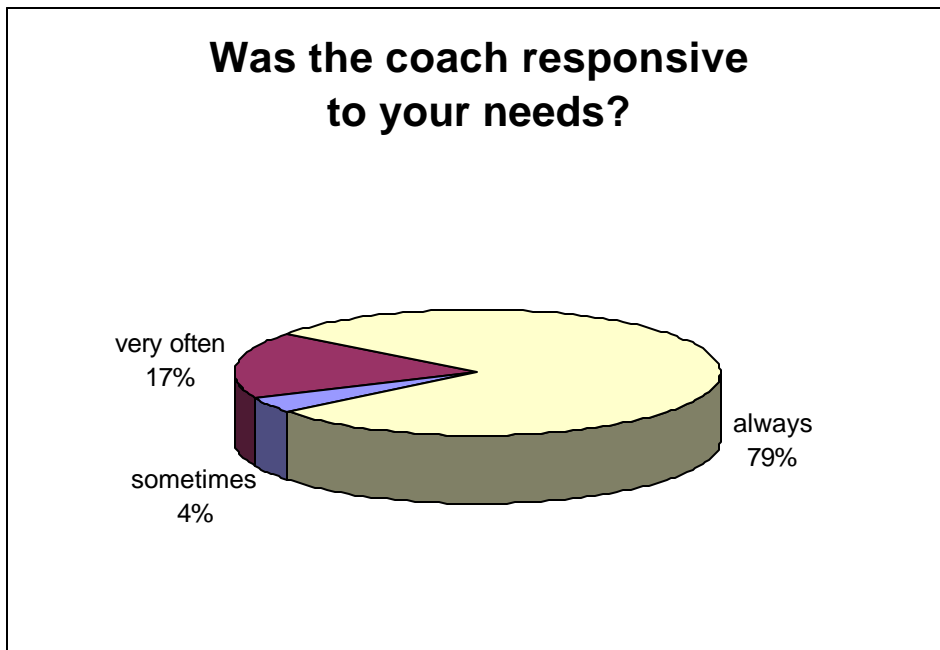
Yes, like part of the family

There are not enough ways to say how much we are satisfied!

We're satisfied. The coach is easy to talk to.

Yes, more than satisfied.

A majority of respondents from these schools, 79%, indicated their coaches were responsive to their needs.



The majority of schools, 71 percent, rated the effectiveness of their coaches as very good or higher; 21 percent of schools reported a rating of good, while 8 percent reported a poor rating.



Only a few schools reported dissatisfaction with a coach. Staff in these schools made the following remarks:

She didn't get to the point of addressing our specific needs.

Sometimes her visits caught us off guard. That was the biggest problem. It was an inconvenience and a bit of a nuisance.

More guidance and direction based on our goals would have made our coach a more satisfactory resource.

These types of responses were formative in that they indicated to AED's TA director and FMS staff the kind of guidance and further training and support that coaches needed. For example, lists of positive and negative comments from staff in participating schools were generated and circulated among the coaches at one of their quarterly meetings and a summer institute. The coaches and director discussed how to address the concerns expressed by school staff and changes that might be needed in the coaches' schedules and work. To address some of the negative comments aimed at individuals, the AED TA director met with the coaches privately for similar types of discussions.

Making Coaching More Effective

As a follow-up question, school staff members were asked what would have made coaching more effective. In general, respondents reported that they were satisfied with the coaching they received, as described above. However, some staff mentioned a need for better role clarification, particularly for the coach, and more clarity about the (MS)² process overall. In these cases, school staff found the coaches' role vague and the Middle Start concept too abstract. Some responses indicated improved communication about these topics was needed between the school and the coaches. Other schools simply wanted more intensive coaching. For example, they wanted more time with their coach, personal attention, and more hands-on coaching activities.

The school telephone survey asked school staff to provide additional feedback regarding coaches, the coach assignment process, etc. Staff provided both positive and negative feedback about coaches, as summarized below.

- **Respondents were very satisfied about the coaches' communication styles.** They commented that they liked the delivery of the coach or that the coach was a good listener. Also, they were satisfied with the initiative (or "proactiveness") of coaches. For example, staff described coaches who were responsive, sought clarification, went out of their way to do things, and attended school events they were not required to attend.
- **On the other hand, respondents generally wanted more contact with their coaches.** For instance, they wanted more planned meetings with their coaches or they wanted to see their coach on an as-needed rather than a monthly basis. In addition, they wanted more knowledgeable coaches. However, what some respondents meant by "knowledge" was expressed differently by different schools. For example, for some, "knowledge" referred to

content knowledge in the middle grades, for others it was knowledge about time lines, and others wanted specific knowledge pertaining to the implementation grant.

Summary

School staff members mentioned a number of activities that coaches conducted, such as offering hands-on workshops, conducting classroom observations, and providing middle-level resources to schools. These activities coincided with many of the same activities that coaches said they performed in schools.

In regards to aligning coaching activities with school improvement plans and schools' Phase II proposals, most surveyed staff members commented that there were closer links between the coaching activities and school improvement plans than between coaching activities and the Phase II proposals. This finding may be due to the complexity surrounding the Phase II proposal process and other tasks.

According to most surveyed school staff members, there was a high level of satisfaction with coaches. The majority of school coaches were responsive to the needs of school staff members; the effectiveness rate for coaches was high; and the frequency of coaching activities was sufficient. However, a few staff wanted more contact and direction from coaches, and some staff members wanted coaches who were more knowledgeable about middle-grades content or organizational matters specifically pertaining to schools.

3. VOICES FROM THE (MS)²LISTSERVE

The listserv managed by AED offers an opportunity for electronic exchange and dialogue among listserv members, who include TA coaches and various members of the (MS)² management team.

The primary type of exchange occurring on the listserv during the planning year was the dissemination of information obtained from various online publications such as *Pen Weekly NewsBlast* of the Public Education network and *The Middle Grades News* of the Edna McConnell Clark Foundation. Articles made available to coaches through these publications featured such issues as funding for school reform, the controversies of high-stakes testing, and the use of data to drive decisions in education. The messages also included numerous congratulatory and sympathetic notes of a personal nature.

Only a few messages exchanged on the listserv were directly related to the experiences of coaches in schools or at conferences. One, for example, described the difficulty of working with a school in which teachers were ambivalent about what action plan to follow. Often, messages such as these were followed up by a telephone call between the director and the coach; however, the listserv did not generate exchanges of ideas related to coaches' work. Lastly, there were frequent messages on the listserv about TA meetings and agendas for conference calls. On the whole, the TA coaches' listserv was frequently used but the exchanges were not as substantive or illustrative as they might have been: there was little debate or replies to topics to

benefit the entire group. More helpful hints and lessons learned from coaching experiences might have aided the work of (MS)².

DISCUSSIONS AND RECOMMENDATIONS

Discussion

Presently in progressive educational thought there are efforts to create “communities of learning.” These are schools that exemplify the most up-to-date knowledge of teaching and learning not only for students, but also for teachers and often the community-at-large. The efforts to redesign schools in this manner represent a change in organizational thinking as relationships in the school become more dynamic and oriented more toward process than tasks and products. This type of reform was suggested by the work accomplished in (MS)² during the planning year as the initiative staff and managers endeavored to create learning communities through professional and leadership development. Some links between the work of (MS)² and the literature on learning communities are the following:

- ***The importance of learning communities.*** Much literature stresses the need to reorganize schools into more closely knit professional institutions. There is extensive evidence indicating that schools organized as professional learning communities promote greater teacher commitment and more student engagement in school work. (Berk, Camburn, and Louis, 1999 and Meier, 2002). In their efforts to develop the leadership teams, get more, and a wider variety of, staff members involved, and solidify relationships among all stakeholders, the (MS)² TA coaches attempted to foster this type of learning community to effect change in schools.
- ***Shared values and personal contact.*** Theories support the effectiveness of collective learning communities where behavior is shaped by common goals, shared values, and regular personal contact. (Berk, Camburn, and Louis, 1999). In (MS)², coaches’ visits and other contacts with school staff supported the need for personal contact with the coach and among the members of the leadership teams. Participation in (MS)² helped focus team members on the common goals of the initiative and foster the sense of shared values needed to develop an effective learning community.
- ***Active involvement of teachers.*** Research indicates that teachers who are actively involved and empowered in the reform of their own curriculum, classrooms, and schools are “capable of changing their teaching behavior, the classroom environment, and improving student achievement.” (Craig, Helen; Kraft, Richard; and du Plessis Joy, note date). The composition of the leadership teams in (MS)² schools exemplify this notion of the participation of school staff. More active involvement and the feeling of empowerment on the part of staff should follow in the next years of full implementation.
- ***Importance of highly qualified and dedicated staff.*** Research confirms a connection between teacher attitudes and skills and student achievement: “When teachers are involved in making decisions about changes that affect them, enjoy being around children, have the skills

to impart appropriate knowledge and manage their classrooms, and understand their role in the broader community, they usually are highly motivated, and their students' achievement tends to rise.” (Craig, Helen; Kraft, Richard; and du Plessis Joy, no date). These qualities of effective teachers are ones that the (MS)² evaluation team will explore as the initiative proceeds. As a result, there should be an increase in teacher skills and in student achievement as well.

Recommendations

The recommendations suggested by the data presented in this report span several overlapping categories: central district concerns, school leadership, coaches' communication with one another and their schools, and development of schools as learning communities.

- ***Address lack of district support***

The finding concerning lack of support from school districts is important since it represents a tension between the participating schools and their districts. Such a tension, if acute, would seriously diminish a school's potential to carry out reforms suggested by the goals of (MS)². Managers of the initiative should include this district-school tension as an agenda item in their team discussions; they should also work with contacts in the districts to bring about more buy-in on the part of district staff. In addition to communications with district staff, these staff members should be invited to participate in (MS)² convenings to obtain a greater sense of the initiative as a whole.

- ***Address changes in administrative leadership in schools***

The issue of turnover in leadership bears watching closely, but it may be difficult to improve in the time line of (MS)². The widely discussed and lamented phenomenon of principals' short tenure in a given school is no less present in these schools even though they are in the process of reform. TA coaches need to remain aware of the administrative changes and devise strategies for increasing support for change so that the teams and the reforms will continue despite administrative changes. Members of the management team should discuss ways to welcome and include new administrators into the initiative.

- ***Foster electronic communication.***

The evaluation team will continue to collect data on communication and sharing among the coaches. In this planning year, the coaching team went through the process of becoming a solid working group. There are already signs that team members are gaining comfort with one another as time passes. (MS)² management should make special efforts to encourage more electronic communication, especially on substantive issues that affect (MS)² or middle-grades reform in general. Coaches should feel free to engage in back-and-forth conversation rather than limiting their participation to information sharing.

- ***Foster development of schools as learning communities***

The management of (MS)² should continue to nurture the development of schools as learning communities. The findings in this report indicate the beginning of this development. The tenets of this model will aid in the sustainability of reforms after foundation funding

ceases. Ideally, schools will become communities of learners and accept responsibility for the ongoing improvement of teaching and learning in the school.

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APPENDIX

APPENDIX

Chronology of Mid South Middle Start Meetings

(Summer & SY Fall 2000-Spring 2001)

Beginning Of Planning Phase With TA Coaches

July 13-14, 2000

Title: *(MS)² TA Coach Orientation*

Summary: This meeting served as the first gathering and orientation for the new TA coaches.

Agenda for the orientation

Day 1

- I. Welcome
- II. Overview of the Foundation for the Mid South
- III. Overview of Middle Start
 1. national and regional reform, cornerstones, student learning
 2. vision statement and characteristics
 3. purpose, review of Phase I, introduction to Phase I
- IV. Mid South Middle Start and the Academy for Educational Development
- V. Role of the technical assistance coach
- VI. Q&A
- VII. Logistics
- VIII. School assignments

Day 2

- I. Overview of agenda and energizer
- II. Text-based discussion
- III. Overview of Self-Study
- IV. Procedures and logistics—responsibilities, payment requests, reimbursement policy
- V. Technical assistance next steps

August 7-10

Title: *(MS)² Summer Learning Institute*

Summary: Day 1 of the institute focused on the TA coaches to help them gain more in-depth information about (MS)² and middle-level concepts (i.e., Ten Dimensions of School Improvement, School-to-Watch Criteria from the National Forum, and Self-Study Data Analysis.) Days two and three of the institute welcomed nearly 300 participants from 23 different schools. The conference sessions ranged from large presentation formats on middle-level concepts to small-group planning sessions with TA coaches.

Agenda for the Summer Learning Institute

Day 1

- I. Welcome
- II. Transition to small groups
- III. Breakout I
- IV. Breakout II
- V. General session with updates

Day 2

- I. General session
- II. Breakout III
- III. Transition to partner schools/TA sessions
- IV. Small group sessions
- V. State group/reflections in journal
- VI. Performances and rubrics
- V. General session with updates

Day 3

- I. General session
- II. Action plan development/convene in TA groups
- III. General assembly

August 18, 2000

Title: *(MS)² TA Coach Conference Call*

Summary: During this conference call, various professional organizations and websites that provide high-quality information on middle school reform and professional development were discussed. The calendar of professional organizations' conferences was shared. The logistics of submitting reimbursement paperwork and coordinating publicity with assigned schools were discussed. TA coaches shared reflections from the Summer Learning Institute and their initial conversations with their schools. A list of resource materials was also shared.

Agenda for the conference call

- I. Conferences and memberships
- II. Websites
- III. Financial Inquiries—per diem, reimbursements, etc.
- IV. Publicity shots, banner presentation, etc.
- V. Reflections about the Summer Learning Institute
- VI. Overview comments
- VII. October meeting
- VIII. Misc. (i.e., resource materials)

September 8, 2000

Title: *(MS)² TA Coach Conference Call*

Summary: During this conference call, Lea Williams and the TA coaches discussed the response rate from the basic school survey, which was distributed at the Summer Learning Institute. TA coaches reported the results of their school visits and discussed various professional development resources and ideas. Initial planning

for state-level meetings were discussed, as were upcoming TA meetings and events. Additionally, a TA-partner meeting brainstorming/planning session was held after the conference call.

Agenda for conference call

- I. Basic school survey
- II. School reports
- III. Discussion items

State meetings

- Professional development for TA coaches
- Professional development for schools
- Involving State Departments of Education
- IV. October Quarterly Meeting Update

September 11, 2000

Title: *(MS)² Management Conference Call*

Summary: The purpose of this meeting was to go over the Timelines for Phase I and Phase II, preview the next steps for grant planning, and to discuss the Quarterly TA Coaches' Meeting.

Agenda for the conference call

- I. Updates
- II. Timelines for Phase I and II
- III. Next steps for grant planning
- IV. Quarterly TA Coaches' meeting.

October 9, 2000

Title: *(MS)² Management Conference Call*

Summary: During this conference call, initial school visit reports were presented. The level of readiness for the (MS)² model was not quite as expected, so that there may be a "revisiting" of the timeframe/focus of model implementation. Attendance at upcoming middle school meetings was discussed, as was infrastructure and capacity building for the (MS)² model. Feedback was given regarding the grant-making process.

Agenda for the conference call

- I. School visits
- II. Meetings
- III. Grant-making suggestions
- IV. Infrastructure and capacity building

October 10, 2000

Title: *(MS)² TA Coach Conference Call*

Summary: During this call, TA coaches were asked to share the resources they were using with their schools to build a library of "artifacts." TA coaches discussed the

initial formation of leadership teams in the schools, as well as upcoming regional meetings and updates from school visits. School-survey results were shared regarding vision statements, school reform, and teaming. TA coaches and AED staff shared literature and other resources that could be effective for assisting with model implementation. School visits by AED/FMS staff were also discussed.

Agenda for the conference call

I. Discussion items

- Resource sharing by TA coaches
- Leadership teams in schools
- Key school news
- Basic school survey results
- Professional development activities
- School visits
- Other business

October 15-16, 2000

Title: *(MS)² Technical Assistance Quarterly Meeting*

Summary: The purpose of this meeting was to receive an overview of plans for further grants; increase the knowledge of as well as practice the team process for use in grantee schools; establish ongoing discussion groups to address issues identified by group members; engage in conversation with CPRD staff on the collection, analysis, and use of data; and continue the coordination and alignment of the consultants' approaches to grant-implementation goals, procedures, and strategies.

Agenda for the meeting

Day 1

- I. Greetings, review agenda and logistics
- II. Overview of planning grant
- III. Energizer and guidelines for building consensus
- IV. Self-Study discussion
- V. Discussion of group formation
- VI. Discussion groups
- VII. Reflection

Day 2

- I. Guidelines for action plan
- II. Presentations by TA coaches
- III. Announcements, committee formation, determination of priorities
- IV. Reflection and closure

November 10, 2000

Title: *(MS)² TA Coach Conference Call*

Summary: The meeting centered on exchanging resources regarding middle-level education and discussing the importance of establishing leadership teams in schools; the TA coaches' activities in the schools (e.g., professional development and school

visits); and conference and meeting updates. Vernay Mitchell also highlighted survey results from the basic school survey.

Agenda for the conference call

- I. Resource sharing by TA coaches
- II. Leadership teams in schools
- III. Regional conferences/meetings
- IV. Key school news
- V. Basic school survey results
- VI. Professional development activities
- VII. School visits
- VIII. Other business

November 13, 2000

Title: *(MS)² TA Management Meeting*

Summary: This meeting centered on reflections about the TA quarterly meeting. In addition, Ruthie Smith-Stevenson presented a school-visit report.

Agenda for the conference call

- I. Overview of latest activities
- II. Reflections about the TA quarterly meeting
- III. School visits
- IV. Documentation

November 16, 2000

Title: *CPRD Self-Study Conference Call*

Summary: This call was focused on the use of Self-Study data. TA coaches shared and were trained on disaggregation, accountability/achievement data, and cross-referencing with other data. The need for a “how-to” section was discussed, including definitions, tools, understanding data relevance, etc. Training to gain “proficiency” in data analysis is part of the long-term plan, as is placing the Self-Study in a larger context with a process for analysis. CPRD’s data collection schedule for the three states was also shared.

Agenda for the CPRD Self-Study conference call

- I. How do schools use the Self-Study data set?
- II. Questions that need to be answered
- III. Other updates

December 8, 2000

Title: *(MS)² TA Coach Conference Call*

Summary: During this call, reports were given on AED, FMS, and the Kellogg Foundation’s tour of (MS)² schools—schools are still operating in a very “traditional” manner, but a few hints of change were seen. TA coaches gave reports on their schools’ progress. A report from school visits in Baton Rouge was given, and the “ground rules” for school visits by (MS)² schools were

discussed. Upcoming meetings were discussed as were a few financial/logistical issues for the TA coaches.

Agenda for the conference call

- I. Minutes
- II. Delta tour (Kellogg)
- III. Consultant activity Report(s)
- IV. Baton Rouge school visits—Jane Thomas
- V. Grantee school visits to other schools
- VI. Announcements

December 15, 2000

Title: *(MS)² Management Conference Call*

Summary: During this call, the need for an additional TA coach was discussed. An update on the next school Self-Study was given—109 schools in the three states were to participate. Grant-making plans for (MS)² had not yet been finalized, and Phase II was still being designed. A draft of Phase II was to be ready for the February training. A brief report on social marketing and public engagement was given.

Agenda for the conference call

- I. Updates
- II. Self-Study
- III. Grant-making guidance
- IV. Phase II design work
- V. February meeting
- VI. Preliminary report—Phase I
- VII. Conference call with social marketers
- VIII. Possible meeting in Kansas

January 19, 2001

Title: *(MS)² TA Coach Conference Call*

Summary: During this call, the two new TA coaches were introduced who were to take over two schools in Arkansas, School visitations for the month of January were suspended until TA work orders could be processed. Copies of *Turning Points 2000* had been received and were to be distributed to TA coaches. Wayne McLeod, one of the TA coaches, presented his research on the characteristics of middle-grades students.

Agenda for the TA Coaches conference call

- I. Introduction of New TA coaches
- II. School visitation
- III. *Turning Points 2000*
- IV. Report (on research middle-grades students)

February 9, 2001**Title:** *(MS)² TA Coach Conference Call***Summary:** During this call, it was confirmed that school visits should continue, as new TA work orders were complete. Two schools were reassigned because of the resignation of one of the TA coaches. School surveys regarding planning grants had been distributed, with the results to be shared at the quarterly meeting. Further information about the upcoming quarterly meeting was shared. A videotape about (MS)² to be used as a publicity tool was mentioned.***Agenda for the conference call***

- I. Updates
- II. Announcements
- III. News of interest

February 19-21, 2001**Title:** *(MS)² Technical Assistance Quarterly Meeting***Summary:** The purpose of this meeting was to provide updates from across the region, as well as to provide the formal and informal opportunities for sharing across the TA network.***Agenda for the meeting****Day 1*

- I. Greetings/introductions
- II. Dinner
- III. Updates

Day 2

- I. Warm-up activity
- II. Self-Study work session
- III. *Turning Points 2000*
- IV. Next grant cycle/comprehensive school reform models
- V. Announcements
- VI. Consultant sharing
- VII. Reflection

Day 3

- I. Announcements
- II. TA coach meeting with TA Director
- III. Reflection/announcements/closure
- IV. Standards-based reform at the middle level

March 7, 2001**Title:** *FMS/AED Conference Call***Summary:** The purpose of this meeting was to discuss the criteria for TA/PD coaches and determine the recipients of invitation (TA/PD coaches). The meeting also included initial plans for Phase II, CSRD, and partnership building.

Agenda for the conference call

- I. Immediate planning grants
- II. Phase II plans (CSI/CSR)
- III. (MS)² partnership building

March 9, 2001

Title: *(MS)² TA Coach Conference Call*

Summary: TA coaches gave updates on their school visits and the progress of their schools. Schools were starting to grasp some key concepts of the (MS)² reform model. RFPs for Phase II were to be distributed on March 12, with two options for submission—one for schools with planning grants and one for schools without grants. *Turning Points 2000* assignments were made for the TA coaches jigsaw activity.

Agenda for the TA coaches conference call

- I. School reports
- II. Phase II updates
- III. Announcements
- IV. Closure

April 12, 2001

Title: *(MS)² TA Coach Conference Call*

Summary: During this call, TA coaches gave reports on their schools, including the plans for Phase II grant writing. There was some concern regarding turnover of leadership and lack of leadership commitment in some schools. All schools had received their RFP, and an update on the RFP training sessions was given. Information on upcoming meetings was shared.

Agenda for the conference call

- I. School reports
- II. Phase II orientation update
- III. Announcements

May 1, 2001

Title: *(MS)² Management Conference Call*

Summary: One hundred and thirty-seven schools were invited to attend the Comprehensive School Improvement (CSI) and Focused Professional Development (FPD) RFP orientation sessions. Answers to written questions regarding the RFP were to be posted on a listserv. The process of seeking an intermediary organization to provide technical assistance to grantee schools was discussed, as well as the RFP for Professional Development Partners under review. It was reported that 70% of schools had completed the second Self-Study. Documents, templates, and a database for AED were discussed with progress shared via email.

Agenda for the management conference call

- I. The RFP Process for Comprehensive School Improvement (CSI) and Focused Professional Development (FPD) Grants
- II. TA in Phase II
- III. RFP for Professional Development Partners
- IV. Status of the Self-Study
- V. The planning grant schools: Quick overview of progress and issues
- VI. National “basket” of materials
- VII. Database development for Middle Start

May 18, 2001

Title: *(MS)² TA Coach Conference Call*

Summary: During this call, it was reported that 20 grant proposals had been received, with recommendations for funding to be approved at the June 12-13 FMS board meeting. TA coaches were reminded to submit their monthly logs and semiannual reports. An almost-completed technical assistance questionnaire for partner schools to serve as an assessment tool for reviewing the technical assistance strategy in (MS)² was announced. The next TA meeting was discussed, including review of the grant process and provision of TA schools to the schools.

Agenda for the conference call

- I. School proposal update
- II. Logs/semiannual reports
- III. Technical assistance survey
- IV. Technical assistance meeting

End Of Planning Phase

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