

**Update Memo:
Standards-Based Middle School Reform
Jefferson County Public Schools**

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INTRODUCTION

In our baseline report of August 1996, we wrote that Louisville was so focused on KIRIS¹, one component of KERA, that a) it had not yet figured out how to connect that focus with KERA's larger reform agenda, and with other compatible components of standards-based reform; b) it had not decided what it wanted children to know and be able to do aside from learning the content and outcomes measured by KIRIS; and, c) it had not figured out how it would assess student learning in light of standards and in ways other than KIRIS provided. Our recent set of interviews at central office, Gheens Academy and the schools suggest that the district has come to the same conclusion.

When we visited Louisville in December, central office administrators talked about suddenly becoming fully aware of the connections between KERA and standards-based reform. This awareness followed the shock they experienced at receiving the district's low KIRIS assessment scores. Across the state, middle schools did not achieve well. In Louisville, more than half of the 24 middle schools were in "decline" and one was in "crisis."²

It was in this context of decline that central office administrators talked about KIRIS scores being a "wake-up" call that must lead them to focus on curriculum, instruction, assessment and standards reform more broadly. Some acknowledged surprise at realizing how little attention they had actually paid to these aspects of reform in the past. Others said that for the first time,

¹ Standards-based reform in Louisville takes place in an extremely complex environment of teaching, learning, and assessment reforms launched by KERA (the Kentucky Education Reform Act of 1989) and its associated set of assessment practices called KIRIS (the Kentucky Instructional Results Information System). KERA and KIRIS together are a form of standards reform, that require schools to teach so that all children make progress away from the standards called "novice" and "apprentice" and toward those called "proficient" or "distinguished" within a designated period of time.

² Such schools are given the acronym STAR by the state. The acronym stands for School Transformation And Renewal and it is applied to any school that has not achieved its 1995-1996 KIRIS Improvement Goals.

they were understanding standards and what standards and KERA had to do with each other.

These central office interviews also had a new tone: we heard administrators say that they had done far too little to inform parents and the community about the true nature of KERA and its implications for teaching, learning and assessment. They suggested that they had not provided principals and teachers with the knowledge and skill they needed to successfully implement KERA. Finally, we heard intimations among central office administrators that it was time for them to make standards-based reform the district's agenda.

Initially, the district's activities must remain focused largely on KIRIS because the state's intervention for schools in decline or crisis makes this a requirement. However, we heard plans for long-term reform, plans to enable principals and teachers to gain the knowledge they need to implement improved teaching, curriculum and assessment practices. The plans are promising, but implementing and sustaining them will require a major change in the district's orientation. It will require the district to add to its emphasis on KIRIS an emphasis on standards-based teaching and learning.

Having arrived at this juncture, Louisville has a great deal of work to do if it intends to shift its orientation to KERA and standards-based reform. Some of the supports necessary to the task, particularly those related to professional development expertise at the school level, are in place in the roles of the School Support Resource Teachers and the Clark Fellows. These competent, talented individuals give the district a strong base with which to start. The district's revised plan for using its Clark Foundation Grant (dated 1/28/97) suggests a more standards-based and focused approach to improving student achievement. The work ahead will not be easy, but it is feasible.

In this introduction we stress changes in the district's orientation to KERA and standards-based reform. However, we want to note that there have always been individuals in Louisville who understood standards-based reform and its implications. During earlier site visits we talked with individuals who have seen the links between KERA and standards from the outset and have been distressed by the growing focus on KIRIS at the expense of the goals and potential benefits of the larger KERA reform effort. They have been informed voices without sufficient influence to shape the district's reform agenda. Such individuals, found in the schools and at the district level, can now be a strong resource for the district as it modifies its direction.

In this memo, we emphasize aspects of on-going and proposed work at the district level that can contribute to standards-based reform. This is not to discount the contributions of work going on at schools; it is to stress the importance of central office priorities to the work that schools must do. We begin with a discussion of the immediate impact of having numerous middle schools in decline, noting the support provided to those schools and the implications of their KIRIS-related activities for the rest of the district. Then, we turn to a discussion of what the district needs if it is to truly design and implement standards-based reform. Our stance on this issue derives from the insights of the Louisville people we interviewed as well as from our

knowledge of what has been important to standards-based reform in other districts. We touch on issues of district and school-level leadership, performance standards, and the development of district and school-level commitment to the reforms. We include in this discussion some broad conditions in the district and at the schools that merit attention as standards-based reform is developed and implemented. Our presentation is informed by the district's revised proposal for Year II of its Clark grant. Finally, we discuss changes in our evaluation strategy and timetable in light of the district's revised implementation strategy.

An Introductory Note. This memo is based on data collected by Barbara Neufeld, Donna Gaus, and Letitia Fickel during the week of December 2, 1996 and on several days in the following weeks. To gather the data, we interviewed central office administrators at Van Hoose, Gheens Academy personnel, and principals, teachers and students at Williams, Johnson Traditional, Conway and Lassiter Middle Schools. In addition, we observed each of the teachers in our sample. For the most part, these were second interviews and observations of teachers from whom we are learning about progress with standards-based reform. The Superintendent was unable to schedule a time to talk with us during our visit. Finally, we read documents related to the district's reform agenda and held several follow-up interviews with district personnel.

Before we begin, we remind readers that this document is a memo; it is not a comprehensive analysis of all of the data we collected in Louisville in December. Our next report, due late in the Fall, will reflect all of the data collected during the Spring 1996, Fall 1996, Spring 1997 and Fall 1997 site visits to Louisville.

THE IMMEDIATE IMPACT OF SCHOOLS IN DECLINE

Ironically, the initial impact of having so many schools in decline is a greater emphasis on preparing students for the next KIRIS administration in April 1997. Each school in decline or crisis is assigned a state selected and trained Distinguished Educator (DE) who helps the school put together a KIRIS Preparation Plan.³ This Plan, as we understand it, has two major components: a short-term emphasis on test-taking skills and a longer term emphasis on developing a very strong School Transformation Plan (the school's annual improvement plan required under KERA).

To begin the process, the DE does an "environmental scan" of the school to determine factors

³ The KIRIS Preparation Plan is "A plan developed by the school to prepare for the 1996-1997 KIRIS Assessment. The plan includes a year-long focus on instructional strategies, effective test-taking skills, and test administration." From, "A KERA IMPROVEMENT PLAN FOR THE JEFFERSON COUNTY PUBLIC SCHOOLS," First Draft, November 11, 1996, page 1.

that might negatively impact on students' capacity to do well on KIRIS.⁴ These might include low student motivation, unfamiliarity with the form of questions on the assessment and unfavorable test-taking conditions. The DE's findings are used to help teachers improve student motivation and test-wisness. For example, as a result of the DE's work, teachers in all four of our sample schools had decorated their walls with vocabulary words used in KIRIS questions and provided by the DE. These included, for example: analyze, argue, compare, contrast, define, demonstrate, identify, and interpret. These words were to be taught in the context of regular instruction; they were not to be taught as isolated vocabulary words. During our classroom observations, we saw examples of such in-context use when teachers asked students to respond to questions about particular content. They agreed that without an understanding of these words, children would not be able to do well on KIRIS even if they understood the content asked for in the questions.

For the more long-term focus, the DE helps teachers and the principal analyze the school's KIRIS data in order to determine the content that students were learning more and less well. Then the DE helps the school choose a component of curriculum and instruction on which to focus for the next year with the aim of improving instruction and achievement in that area. As part of the school's work on the component, teachers submit and discuss samples of student work as evidence of progress and as a way to discern what they should do next.

From the district's perspective, the DE's expertise and the attention devoted to both the long- and short-term aspects of the KIRIS Prep Plan are all to the good. They encourage teachers and principals to create a serious planning document and then follow it throughout the school year. Done well, the process can increase the school's capacity to apply this process to other curriculum and instruction areas. It can also lead to increased student achievement.⁵

However, with only eight DE's available for the 31 STAR schools, the district worried that each school would not have enough DE time to gain sufficient benefit from their expertise. Therefore, it created KERA Support Teams to supplement the DE's work. Each Support Team is composed of representatives from central office units including School Support, Curriculum and Assessment, Portfolios, Leadership Development Center, Title I, Clark Fellows, Exceptional Child Education, and Computer Education Support. The Support Team's purpose is to work with the DE in each school to provide focused assistance that will enable

⁴ We did not have an opportunity to talk to any DEs while we were in Louisville. Our understanding of the focus of this KIRIS related work is based on what we were told by people involved in the process. We will talk to a DE on our next visit to the district.

⁵ We are describing a rational process that can have long-term benefits. But, we want also to note that the process is taking place in conditions of high anxiety and at a somewhat frantic pace. Principals of schools in decline or crisis were taken out of their buildings quite frequently at the start of the KIRIS Prep Plan process for numerous meetings. They and their teachers feel great pressure to improve their students' scores on the next set of assessments.

the school to meet its KIRIS improvement goal. Most Team members with whom we spoke and their supervisors consider the training they received to be a benefit to the district's long-term capacity to improve teaching and learning.

The creation of Support Teams has led to a change in focus for the School Support Resource Teachers and the Clark Fellows. At the start of this school year, they were teamed with one another to provide maximum benefits to all of the schools. Clark Fellows reported that in the initial team structure they were able to work in classrooms with individual teachers devoting sufficient time to make a difference in their practice. Resource Teachers were each working with their four schools. With the advent of the KERA Support Teams, both Clark Fellows and Resource Teachers had to shift their attention to the STAR schools. They say that they touch base with all of their schools, but their major emphasis is with the STAR schools. This raises concerns for the Clark Fellows, for the non-STAR schools and for us, although we understand the district's decision in this matter.

First, the Clark Fellows have shifted their attention and expertise from individual teachers to teams of teachers and to departments. Their work is still valuable, but they point out the importance of returning to their previous work with individuals because of its potential to improve teaching practice. Second, while the district understandably is focusing its resources on schools in decline or crisis, principals of middle schools that are not in that condition point out that they could benefit from similar assistance. Some say that they, too, might be in a decline category after the next KIRIS administration. Others suggest that they might use KERA Support Team assistance to further improve their KIRIS status. These principals' concerns highlight the importance of developing capacity in all of the district's schools given the high stakes character of KIRIS Assessment. Their concerns have led the district sensibly to repeat some STAR training sessions for principals of non-STAR schools.

Third, to the extent that all of these efforts remain determined by KIRIS, the district still has not adopted standards-based reform as its own. Were KIRIS to become less standards-based, would the district also take that route? We stress once again that the district needs to identify its own reasons for reform and which ones would remain dominant regardless of the state's position on KIRIS. And, the district needs to make these known to the schools and to the larger community. Extending the resources available to the STAR schools to all schools, even if in a phased-in strategy determined by current achievement, would be a start in that direction. But we believe it must take other forms as well, if the district is to change perceptions about what matters most.

DISTRICT CONDITIONS NEEDED FOR STANDARDS-BASED REFORM

In this section, we discuss conditions that Louisville must consider as it moves forward with standards-based reform. The list is not exhaustive; it is an emphasis on factors that we think are especially important given the district's context. We begin with a discussion of leadership

for reform. We put this first because, in our previous reports, we have written about the absence of leadership for genuine standards-based reform in favor of attention to KIRIS. Next, we discuss the kinds of knowledge and skill that all educators in the district's middle schools must have if they are to assist the leadership in successfully implementing reform. As a separate topic, we consider the importance of creating circumstances under which teachers and principals, in particular, will "buy-in" to the district's revised reform agenda. This, too, is important in Louisville in light of the external state mandate that has been driving much of what teachers and principals have been attempting. We stress the importance of shifting professionals' attention from the external character of KERA and KIRIS to the local character that standards-reform can take.

1. Leadership, Vision and Focus.

At the same time that the district and schools were focused on the next KIRIS administration, central office and Gheens Academy staff with whom we spoke were confronting what they called the district's lack of leadership for KERA reform. We heard from a sizable number of our interviewees that a) the district had not paid sufficient attention to the implications of KERA for teaching and learning, b) that the test scores were a much-needed wake-up call to the district, and c) that they finally understood that standards reform and KERA and teaching students so that they achieve well on KIRIS might really be the same thing. This awareness grew, not from the test scores themselves, but from soul searching in the context of working with the DEs in the district. As one administrator said in a typical remark,

There's been a lot of reflection going on across the district...and [it makes me realize] what an inadequate job we have done, and the disservice we have done to everybody in this district in the manner in which we have implemented KERA...the lack of, or the inadequate preparation that we've provided at all levels from parents to teachers to principals to kids in understanding the real purpose of that reform.

This frequent analysis reveals the dominant perception of the district's past leadership for teaching and learning reform.

Administrators also talked about the current context in which they will have to garner principals' and teachers' support for new practices that must accompany standards-based reform. They described many principals and teachers as frustrated, tired and, in some cases, demoralized by having changed their teaching strategies without producing sufficient increases in students' KIRIS scores. We know, too, that teachers resented having their work judged only on KIRIS scores; they want to be able to demonstrate student progress and have it "count" as real achievement for themselves and for the students. Under these circumstances, administrators realize that it will take a strong district vision and a great deal of high quality leadership to garner and sustain teachers' and principals' further commitment to reform.

At the middle level, Sandy Ledford, the Middle School Advocate, and Sherry DeMarsh, the Clark Grant Director, seem to have the leadership skills and the knowledge of standards-based reform necessary to the task. Sherry brings exceptional credibility to this position as a result of her knowledge, skill and personal relations with the district's middle school principals. Because of her prior work as a middle school principal, Sherry is well respected as an instructional leader among her peers. We heard repeatedly from principals, central office and Gheens staff that she is expert at putting together collaborative groups that can emphasize a true standards-based reform agenda. In collaboration with Sandy Ledford, the Middle School Advocate who has the authority to move reform forward, these two individuals seem poised to engage others at central office, at Gheens, and at the schools in the work of standards-based reform.

What must this leadership do at this point? In our view, it must stress learning rather than test-taking as the goal of the district's academic program and it must provide schools with the resources necessary to sustain this emphasis. The district must maintain this stance even though it cannot ignore the immediate demands of KIRIS. Middle school leadership must explain the links between standards-based reform and KIRIS and confidently promote the vision of KIRIS achievement increasing as a function of improved teaching and learning, not merely as a function of better test-taking skills on the part of children. The revised Clark proposal suggests a strategy for moving in this direction by developing principal and teacher capacity for examining the quality of on-going student work and for using that process as a way to identify strengths and weakness of teaching. We look forward to watching the strategy unfold at the district level.

The district needs, also, to promote strong leadership at the school level and, toward this end, there is now considerable attention on the professional development needs of principals. It is principals who must fully understand KERA, standards-based reform and their implications for teaching and learning if they are to provide leadership at the school level. District level administrators reported that they finally realize that many principals do not yet understand standards. Until the current crisis, they did not have to; despite KERA, their jobs have remained primarily managerial. This situation troubles both the principals and the district.

I think principals have suddenly realized they're not equipped, and so they're at all different levels. They're from bewildered to denial to refusal. They're all over the place. So trying to begin to work with that group of people from the standpoint of what do they need to know and be able to do in order to implement standards based reform [is essential]. (Central Office Administrator 12/97)

If this indeed is what we are to be about, instruction and teaching, then that's what the focus of our meetings should be. They should not be about the number of kids we have in the buildings and all these other things that they want. Our meetings in the past have been a series of people running through and telling us

stuff, some informational stuff, some stuff we have to do. And it usually has absolutely nothing to do with teaching or instruction. It's all management oriented things....If being instructional leaders is our top priority, then why are we not focusing our time together on that top priority rather than on the management of our jobs? (Principal 12/97)

There are principals who need to know things as basic as what is a standard? What is a content standard? What is a performance standard? How do I help my teachers write good valid rubrics? How do I take a task that a teacher has given to students for years and make it into a task that's authentic; that they can do authentic assessment based on that task that they love and don't want to give up?...In order for principals to help them see the need to do things differently, they have to be well versed in the lexicon of standards based reform. It's something they have to understand as well as the teachers. (Central Office Administrator 12/97)

At the start of the school year, principal professional development was still designed to focus on managerial issues. We were told that principals learned about budgeting in the fall and had a meeting scheduled for November that was to focus on how faculty meeting could be used as "climates for change." When the KIRIS scores were reported, to their credit, district leadership scrapped these plans and reconsidered principals' needs.

As a result, principals now report that the district is providing them with a great deal of help in the persons of the Clark Fellows and the School Support Resource Teachers. They report sensing that the district is there to help them and their teachers. We heard this from STAR schools and from others. We heard this from the Clark Fellows and the Support Teachers as well. Principals are ripe for professional development that will enable them to provide effective leadership to their schools.

Sandy Ledford, the Middle School Advocate, along with the Clark Director and representatives from the Curriculum and Assessment and School Support Units have been working on activities to increase principals knowledge and skill so that they can become more effective instructional leaders. At the time of our visit, most principal professional development was still focused on KIRIS preparation. We anticipate that, as the year goes on, principals will have the opportunity to better understand the conceptual ideas behind standards and standards-based reform.⁶

⁶ The first occasion for such learning will be a mini-conference on February 13, 1997 when Everett Kline and Susannah Patton introduce principals and a sample of prospective teacher leaders to the strategies of looking at students' work in order to develop and use performance standards.

2. Knowledge and Skill

Principal leadership must be built on a strong content foundation; principals must understand the conceptual grounding for standards-based reform and its implications for changing teaching practices. They must know what is involved for teachers who are making the changes; they must know all of this in order to help teachers. Teachers must also have this knowledge. In addition, they need practical help in adapting or more fundamentally changing both curriculum and instruction.

During our December evaluation visit, we were impressed by the ways in which some principals were helping themselves and their teachers to gain knowledge of and experience with standards-based reform. For example, one principal in our sample took responsibility for her own learning by teaching a graduate course on standards and their connection to KERA and KIRIS. She used the opportunity to teach as an opportunity to further her own professional development on standards. As a result, she has a better idea of how to help her own teachers and she is better informed about what she and her colleagues should address in their professional development.

Other principals are ahead of the district in bringing to their teachers ideas about examining student work and using rubrics for student assessment. One principal reported:

I'm having the department chair and the team leaders come to a meeting. And I'm going to just begin a serious dialog about: How do we recognize quality work? Do we have examples of quality work? Do our students have models? We know what the state gives us for quality answers on KIRIS. But for day to day teaching, do we know what quality work is? And so I'm going to meet with the team leaders just to formulate a plan for how we can begin to gather this evidence of quality work. As a result of that, how can we begin to design authentic assessment that's going to get at those kinds of results? That's a conversation we really should have had two years ago. But we're just now beginning to have it. And, we've got to learn how to be designers of work, quality work that kids are going to do and that they're going to persist at doing.

Another school level administrator suggested that school-level work on quality and authentic assessment was essential but pointed out that such conversations should also be going on across the district. As she put it:

It's time to look at exemplary work across the district and set up what we consider to be benchmarks, what it is that kids really should be able to do in sixth, seventh or eighth grade. And I'm no longer willing to say that this is the best work that [our] students can do. I believe that [our students] can do as good work as any school in this district, whether it's AP or Magnet or Traditional or any of those other things. And I want to be sure that I see that

work and know that I can compare my kids to anybody else. So I think that one of the things that we're looking at in the district is to begin to bring teachers together and have them bring examples of the quality of work that's expected from students and be able to compare that from school to school.

Others echoed this sentiment when they reported wanting greater within-district conversations about standards:

I think it's really important that we create Jefferson County benchmarks, that we have 24 science teachers from the 24 middle school together looking at student work. And I think when that happens we'll have a clearer understanding of what we want, and know that it's what teachers just like us have chosen to do.

Principals and other school site-leaders can be a resource to the district as well as to their schools. Many of them talk about taking standards-based reform and making it belong to them and their teachers. Their knowledge, skill, experience and determination can inform principal professional development. It can also demonstrate to their colleagues the feasibility of implementing standards-based reform.

In addition to individual initiatives, we saw evidence that the district was developing ways in which to provide all principals with the knowledge and skill they need to implement reform. Principals had participated in workshops on how to look at data and use it to help teachers focus more specifically on helping students achieve. The district had provided two in-service activities focused on KIRIS-related issues; there were plans to focus the next session on School Transformation Plans as serious planning documents and not merely as bureaucratic requirements. As one administrator put it, as a result of the KIRIS scores,

We're trying to step back now and help principals help their staff on their SBDM councils to really look at what their needs are, take their needs assessment very seriously, look at all the data that they've collected. Not just KIRIS, but all of the disaggregated data by gender, by race, to look at what groups of kids they are not reaching. Because a lot of kids are doing very well. But there is a whole group of kids who are not doing very well. And that will be December. In February we'll have a two day conference that focuses on some of the quality of work issues that have been raised.

The district is also developing plans for having principals and teachers learn how to look at student work with the goal of developing performance standards within and then across schools. Our experience in other districts suggests that this is a good idea. Principals and teachers have found it stimulating to examine students' work and make decisions about the quality of that work within departments and teams. They have found it beneficial to bring some coherence to their assessment practices.

Furthermore, the process of looking at student work school by school enables principals and teachers to develop ownership of at least part of the assessment system. In our baseline report we wrote,

...as long as the measure of success is something defined outside of the school system, something to which neither teachers, principals or administrators have contributed, no one within the district will really "own" the measure. It will remain imposed; it will remain an external accountability device. The potential of standards-based reform is its capacity to bring participation in developing the performance standards and outcomes **inside** the district, thereby creating local ownership and responsibility for students' achievement of them.

Louisville's decision to engage principals and teachers in developing school and then, perhaps, district level performance standards is a step in the right direction.

Another advantage of developing performance standards is the capacity to use them to demonstrate progress across the middle school years and within a single year. The inability to demonstrate students' progress on KIRIS due to the wide band of scores that are included in the novice category, for example, angers teachers. With the district's own standards, principals and teachers would be able to demonstrate to students and to parents the actual progress that students have made even if they have not yet changed categories as measured by KIRIS.

The district is just beginning to address principals' needs as instructional leaders, but it is beginning. Some of the efforts will be more successful than others; that is to be expected. Still, principals and the district are ready to learn and this condition of readiness bodes well for the enterprise if the district leadership can maintain its clear focus on student learning. We reiterate what we have said before, Louisville has developed the internal expertise and capacity to forward standards-based reform. If it turns to that agenda, it is likely to begin to make progress.

We do not suggest that the progress will occur in a linear fashion or that everything tried by the district or by the schools will be successful. Rather, we suggest that if the district takes the stance of being a learning organization, it can use its experiences in a positive way. We turn briefly to a discussion of the Middle School Institute held in August 1996 as an example of an enterprise that had strong and weak features and from which the personnel involved in its planning and implementation appear to have learned a great deal that they will use in future professional development activities.

Learning from the Middle School Institute

The Middle School Institute was planned by a team that included Sandy Ledford, the Clark Fellows, the School Support Resource Teachers, Brad Matthews and some of his associates

from Curriculum and Assessment, among others. The goal of the Institute was to introduce teachers and principals to standards reform and to show them what teaching informed by standards might look like. To this end, the district brought together approximately 900 middle school staff members including teachers, principals, assistant principals and counselors for two and one half days of sessions focused on standards. The Institute began with an introduction to the Institute led by Sandy Ledford. This was followed by a session on the meaning of standards led by Brad Matthews. Participants met in content areas to learn about the standards most pertinent to them after Brad Matthews' session. After dinner, participants heard an "inspirational" talk by Dr. Lorraine Monroe, Principal of Frederick Douglass Academy in New York City.

During the second day of the Institute, teachers had the opportunity to attend "exemplar" sessions in which teachers demonstrated how they were incorporating standards into their teaching. The afternoon was another opportunity for teachers to meet in content area groups. On Friday, teachers met at their schools or paired with another school to begin to plan for the coming school year.

Our interviews revealed consistent perspectives on the Institute. For the most part, teachers agreed that the goal of the Institute was to "get everyone on the same page" with respect to standards. They thought that the Institute did that. However, teachers as well as planners of the Institute realize that what they now have is surface knowledge of the standards. As one central office administrator put it,

I'm not saying that every teacher or principal that you would talk to would say to you yes, I truly understand what content standards are and I truly understand what performance standards are, and I know how to assess those on a regular basis in my classroom. We didn't get to that point. But we at least opened the door [to their knowledge].

This was done, primarily through the introductory, large-group session.

Almost everyone with whom we spoke reported that the smaller group sessions that focused on content areas were less successful. Teachers complained that facilitators read through the standards, but did not provide any useful activities that would help teachers tie the standards to their teaching. As one of the program developers noted:

What happened is the content specialist ended up basically talking and there wasn't a lot of interaction. And I think people had questions; there were clarifications that needed to be [made] and that never happened.

In contrast, teachers applauded the exemplar sessions which provided them with ideas they could use in their classrooms. However, the planning team for the institute now realizes that the exemplar sessions could have been better; they could have identified more clearly the

standards-based conceptual background of the teaching that was demonstrated. This was an important point for the Institute's developers to learn and one that has informed their plans for the next summer's professional development. We heard from several individuals involved in planning the next Institute and its follow-up sessions that exemplars, to the extent that they are used, will include a discussion of the content standards that the exemplar addresses, the desired student outcomes and the rubrics by which student work was assessed. Changes such as these, learned from the process of moving the reform forward, suggest that Louisville is beginning the difficult work of implementing standards-based reform.

3. Creating Teacher and Principal "Buy-In" Through Examining Student Work

Even if the district creates and disseminates a clear, credible vision and set of goals, it will have to consider how to get teachers and principals to engage in the hard work that implementation demands.⁷ As we wrote earlier, many teachers and principals are tired, frustrated and under enormous pressure to produce better student results. Many are willing to keep trying, but some are not convinced that they or their students can do any better. They are not convinced that KIRIS assessment is fair. Louisville must provide the kind of leadership that will convince teachers to have greater expectations for themselves and for their students.

When we say that teachers must be convinced that their students can learn at higher levels, we do not want to convey the impression that teachers are not already trying to teach to higher standards. In all of our visits to Louisville we see teachers trying new strategies, revising their curriculum, and attempting to connect classroom work to the students' experiences in the non-school world. Schools have formally connected themselves to work settings and to community groups. They have written grant proposals that bring them additional resources. In some cases, they have rearranged their entire organization to create programs and practices designed to meet a wide variety of students' needs and preferences. Schools are changing in Louisville and teachers and principals are working hard.

What they need, to convince themselves that they should take on the more difficult work of making standards-based reform their focus, is some evidence that it will help them be more effective as demonstrated by improvements in their students' learning. We think that any vision and strategy that Louisville adopts must build in it some real opportunities for teacher success. This might come with a process of demonstrating progress towards district as well as KIRIS goals; it might come in other forms that are developed locally and collaboratively and which still focus on student achievement. But, without some indicators of success, and some recognition for that success, we doubt that teachers and principals will be able to sustain the commitment required to further standards-based reform.

⁷ Teachers and principals will also have to create student interest in and understanding of the new ways of teaching and learning and assessing. We think this is also a critical aspect of implementing standards-based reform, but we will leave a full discussion of it to our final report due late in the Fall of 1997.

4. Factors That Will Influence Progress with Reform

Louisville is in the midst of soul-searching and responding to the immediate and long-term need to respond more fully to the implications of KERA and its connections to standards-based reform. The crisis brought about by low scores has mobilized the district to make needed changes to its work with middle schools. We want to summarize what we see as the strengths that the district brings to this endeavor. Then, we want to identify some issues that need to be taken into account if the district is to be successful in developing and forwarding its middle school reform agenda.

Potential Strengths

Ë The district has a strong middle school leadership team in the persons of Sandy Ledford and Sherry DeMarsh who are supported by the School Support Resource Teachers, the Clark Fellows and many others. Together, this leadership can mobilize others to forward middle school standards-based reform. One indication of this leadership is the new plan for the second year of the Clark grant.

Ë The district now recognizes the importance of developing principals' instructional leadership skills and it has begun to create opportunities in which principals can learn these skills.

Ë The district has a plan to increase the number of teachers who are knowledgeable about standards reform by creating "teacher leaders" at each school. This is clearly a good idea. A cadre of teachers will be trained to help their colleagues look at student work with the goal of developing performance standards and perhaps benchmarks for student progress. They will be able to use their experience to inform the district of the success of their work and of additional needs for support and training. In addition, for the first time, the work of standards reform will take place, in part, at the schools; it will begin to be a local endeavor.

Ë The district has a number of teachers and principals who have already begun to implement aspects of standards-based reform; their knowledge and skill can inform others. The district also has many teachers who strongly desire to make a difference for kids. They, too, are a resource for the district. They desire access to knowledge and skill that will help them to realize their own goals.

Ë Louisville has strengthened its capacity to provide support to schools as a result of creating its KIRIS Support Teams. The capacity that those teams embody could benefit many schools concerned with student achievement that might not be KIRIS related. It may be possible for the district to create such teams, perhaps on an ad hoc, basis when schools want assistance with particular aspects of standards-based reform. Such teams would not replace the roles of the School Support Resource Teachers and the Clark Fellows; they would be an additional source of support.

Ē Finally, Louisville is much strengthened by its current stance of admitting to deficiencies in its response to KERA and standards-based middle school reform and developing improved responses for the future. This stance enables the district to learn from its more and less successful efforts.

Potential Threats to Implementation

Ē People at all levels of the system were working under enormous tension since the time the KIRIS scores were returned to the district. People at Gheens with whom we spoke, for example, were fulfilling their usual job responsibilities and they had added to those a) service on the KIRIS Support Teams and b) a variety of activities required by the School Board. We think that the district's leadership needs to attend to the impact of multiple and competing demands on key personnel's time and help people re-set priorities in light of the current crisis.

Ē The DEs initial attention is on "quick-fixes." It is essential for the district to make sure that the long-term strategies that focus on teaching and learning academic content also get sufficient emphasis. KIRIS decline is somewhat of an opportunity; to make the most of it, the district must avoid the danger of falling into its familiar pattern of focusing only on KIRIS at the expense of the larger reform agenda.

Ē Teachers and principals have performed their jobs in ways that the district, until now, considered appropriate. If the district wants to implement standards-based reform, then it needs to make explicit the new ways of doing these jobs and it must help principals and teachers learn new strategies and concepts. Principals report that the district and they have emphasized their role as managers. Teachers, most often, have focused their teaching of content on "covering the curriculum." If the district can sustain an effort to change these roles, then reform can move forward. If not, then we imagine teachers and principals will continue with their dominant practices. The Clark Fellows and the School Support Resource Teachers are a wonderful resource for changing teaching practices. The district must make sure that they return to their original work once the KIRIS crisis is over.

Ē We have not yet seen evidence that the district is adopting as its own standards-based reform. We have seen evidence of new levels of support for teachers and principals in implementing this reform, but it is still based on the state's mandate. Louisville needs to make the reform its own; if it does not, we think it will be difficult to develop the local buy-in that is so essential to using this reform to improve student achievement.

5. Changes in the Evaluation Data Collection Plans

When we visited our sample schools in December, we saw and learned about many changes that teachers and principals were making in an effort to improve student learning. Most of these changes were thoughtful and worthwhile, but, for the most part, they were not tightly

connected to standards-based reform. After talking with Gheens and central office administrators about their plans for the rest of the school year, we concluded that we would be unlikely to see evidence of standards reform at the schools during the rest of this school year. Therefore, in agreement with Hayes Mizell and Sherry DeMarsh, we have changed our data collection schedule.

During the spring of 1997, our on-site researchers Donna Gaus and Letitia Fickel will observe professional development activities focused on standards based reform. Their first activity will involve attending the mini-conference focused on performance assessment to be held in the district on February 13, 1997. As follow-up activities are planned and implemented, they will attend them when that is feasible.

When KIRIS testing is complete, B. Neufeld along with the on-site researchers will interview a sample of principals and teachers who were involved in the mini-conference and are designated to serve as teacher leaders in their schools to work on activities such as developing performance standards for work completed in their schools. This sample will include principals and teachers from our sample schools as well as three or four principals and lead teachers who come from schools that are not in our evaluation sample. We will also interview a sample of School Support Resource Teachers, the five Clark Fellows, Sandy Ledford, Deborah Walker, Sherry DeMarsh, and others who are involved in the district's middle school reform effort.

During the summer, we will attend the middle school institute. Finally, early in the school year -- either late in September or early in October, we will make our next site visit to Louisville, observing and interviewing our sample of nine teachers in each school. By that time, according to the district's revised plans, teachers should be familiar with the idea of performance standards and should be participating in some school-based activities that involve looking at student work to determine its quality.

This revised plan will better enable us to see the impact of the district's new strategy.

Conclusions

Middle school principals and the central office staff are excited to have Sherry DeMarsh in the role of Clark Director. Principals see her as one of themselves, as a principal, and everyone sees her as a strong instructional leader. They express great confidence in Sandy Ledford's ability to advocate for the middle schools. There is a sense of excitement about moving on with reform at the school and district level even amid the exhaustion and disappointment that came with KIRIS scores. Louisville teachers, principals and district administrators are beginning to talk seriously about the implications of KERA for student learning; they are talking about looking carefully at the work that students do in order to understand its quality and what it says about what students know and can do. All of this is progress. We look forward to returning to the district later this Spring and then again in the Fall to see the impact

of this shift in attention to standards-based reform in the district and at the schools.