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Introduction

Think Together and our Orenda Education division propose a 5-year Early-phase project to develop and implement a transformative school systems change model called **Teach, Lead, Counsel (TLC).** It builds on Orenda's 20+ year track record of partnering with schools and districts to emphasize data-driven decision making in instruction and interventions, using tested protocols to guide schools in changing how systems operate to close gaps in proficiency for high need students. We propose to take Orenda's highly effective, but staff intensive, model and develop a digital version that makes it a *highly scalable* and *cost effective* systems change model to reach a much larger number of high need schools. It is geared to high need schools with sufficient in-house capacity and conditions to take on systems change with online support but without the intensive staff support required for Orenda's traditional model.

Orenda developed a Vulnerability Index that "tiers" schools based on multiple data points of need; for EIR, we will develop this into an *eCompass* data platform that automatically imports data from multiple sources, including the CA Department of Education. The current method that the State of California uses to provide districts with student data consists of multiple sources of data in multiple formats. There is no easily accessible centralized platform that houses all the various student achievement outcomes needed by districts. In the Vulnerability Index, TLC will create a data visualization platform for partnering districts to self-assess and deeply understand their ranking. The Vulnerability Index provides data visualizations needed for the Equity Study used by partnering school districts to implement the TLC model. Once a school opts into TLC, school leaders receive training to conduct an Equity Study of the school's student achievement profile, the systems and conditions that explain the profile, and how to accelerate student success. The Equity Study will guide systems change efforts to close proficiency gaps.

TLC engages with and supports educators on three tracks simultaneously: teachers, administrators (school and district leaders), and guidance counselors. The *Teach* track (teachers) starts with the Curriculum Alignment Protocol, a backwards mapping process that uses state standards to calibrate grade-level expectations in an assessment matrix that clarifies how students will demonstrate mastery of grade-level standards. Next, teachers create formative assessments aligned with the standards, followed by creating instructional units. Five times per year, teachers administer formative assessments and conduct Data Reflection Sessions so they can provide specific and timely feedback to students and adjust instruction to fill gaps in mastery of the standards. The protocol and reflections are guided by online professional development (PD) in Orenda Academy, and supported by principal observations, feedback, and coaching. PD also covers High Impact Strategies for evidence-based instruction to close gaps in proficiency.

The *Lead* track for principals and school/district administrators starts with online training in Orenda Academy on Action Steps for Equity Leaders that covers a successful equity leader's disposition, how to expose systemic inequities and combat normalization of failure phenomenon by disrupting systems, and how equity leaders take a critical look at structures, policies, and practices and probe belief systems to determine if anything within their sphere of influence might help or hindrance student equity and academic achievement. In Admin Coaching, principals are trained on effective teacher observations (using *Platinum Ticket* app developed in EIR), timely feedback, and coaching for improvement. Similar to teachers' data reflections, principals conduct five annual Meta Reflections to examine class- and grade-level data to inform which and how they coach teachers to enhance instruction. District-level administrators conduct Mega Reflections of each school to make equity-driven decisions around resource allocations.

The *Counsel* track for counselors also starts with online training in Orenda Academy that prepares them to conduct five annual Guidance Alignment Protocol sessions, in which counselors and administrators review data in the PROMOTE platform developed in EIR. PROMOTE integrates student-level data on achievement, engagement, and school climate to "tier" students into four levels of overall need, identify subgroup needs, and group students with a common profile for more efficient group interventions. Counselors then develop SMART (specific, measurable, achievable, relevant, timebound) common agreements for which interventions are the focus until the next Guidance Alignment checkpoint.

TLC meets **Absolute Priority 1 – Demonstrates a Rationale**, as key components of the project are demonstrated by research to improve student outcomes (see pp. 8-10). It also meets **Absolute Priority 2 – General Field-Initiated Innovations**. Orenda will take our existing staff-intensive systems change model and create a scalable model using online training, tools, and protocols that schools can use independently to address inequities in instruction, school conditions, and improve how interventions are targeted to increase student achievement.

TLC meets **Competitive Priority 2 – Addressing the Impact of COVID-19** by working with schools to incorporate student, parent, teacher, and staff feedback collected in the annual Local Control & Accountability Plan (LCAP) stakeholder engagement process into TLC data platforms and discussed during data reflections. This includes information on students' social, emotional, physical and mental health, and academic needs from COVID, and barriers related to historical educational inequities. Teachers and counselors then use need information to implement three COVID-related strategies. 1) District- and school-wide use of personalized learning using regular formative standards-aligned assessments reviewed by teachers in Data Reflection Sessions five times per year so they can personalize instruction based on each

student's gaps in proficiency. 2) TLC helps schools create and support equitable and inclusive learning environments using data to drive decision-making around instruction, resource allocation, and changing conditions in the school to address inequities. 3) TLC provides evidence-based supports to accelerate grade-level learning, particularly for underserved students, by providing targeted supports for high school students to prepare for postsecondary education transition and success, including teachers' use of High Impact Strategies to increase achievement and counselors' use of the PROMOTE app that automatically "tiers" students so counselors can target interventions to highest need students to keep them on track for college.

TLC also meets **Competitive Priority 3 – Promoting Equity/Adequacy in Student Access to Educational Resources & Opportunities** in two ways. 1) TLC addresses inequities in access to a well-rounded education through data reflections that include looking at conditions – such as access to rigorous coursework and scheduling – and making changes to ensure all and particularly underserved students receive rigorous, engaging, and culturally and linguistically responsive teaching. TLC addresses success in such courses through training teachers on High Impact Instructional Strategies shown by evidence to improve achievement and by teachers' use of formative assessments and data reflections that help them identify and address inequities in instruction. 2) TLC addresses implicit bias with its focus on examining school conditions using the Vulnerability Index and resulting Equity Study to address inequities and explicit bias with equity-focused training for administrators. TLC creates inclusive, supportive learning environments as described above in CPP2 #2.

A. Significance. *(1) Development or demonstration of promising new strategies*

Orenda will take our TLC model to the next level by scaling it to serve a greater number of high need schools that have sufficient in-house capacity to take on systems change with online

support, without the intensive staff support in our traditional model. Promising new strategies in TLC build upon existing school systems change, focused around actionable data for educators.

TLC targets interventions not just to teachers (common in the field) but to administrators and counselors (less common and urgently needed in school settings). Research demonstrates that principals (a core part of district and school administrative teams) are responsible for as much as 25% of overall impact on academic achievement (Marzano et al., 2005). Additional work conducted by Grissom et al. (2021) found that replacing a below average elementary principal (in 25% percentile) with an above average one (in 75% percentile) would result in another 2.9 months of math learning and 2.7 months of reading learning for students.

TLC also targets secondary school (grades 6-12) counselors, who often have the closest (and most high leverage) student relationships, but who are typically undertrained in data use and underutilized in the improving school and student achievement process. Research (Parzych et al., 2019) has shown that student to counselor ratios of 250 to 1 have a significant correlation with lower student absenteeism and higher SAT math, verbal, and writing scores. In California, where project implementation will occur, secondary schools had an average ratio of **622 to 1** in 2019, far higher than the nationwide average of 464 to 1 (EdSource). This is especially problematic for socioeconomically disadvantaged schools in which TLC is needed most. Counselors in these schools have an urgent need for better access to and use of predictive data in student services, given very high caseloads, to target students who have early warning indicators showing they are at-risk for negative outcomes. Research (Wilkerson et al., 2013) shows that elementary schools with comprehensive data-driven school counseling programs achieve higher student academic outcomes than those without these programs. In high school, seeing a counselor in 10th and 12th grade increases likelihood of applying to college by 135% (Robinson & Roksa, 2016).

Key research on the efficacy of online professional development (PD) in the context of curriculum implementation (Fishman et al, 2013) has demonstrated through a randomized experiment that online PD can produce the same impact on measures of teacher beliefs, practices and student learning as face-to-face PD- important since TLC will migrate Orenda's in-person model online. Online PD services in TLC build upon promising practices in research, including learning communities and use of modeling and coaching (Yang & Liu, 2004) through better data analysis tools provided in TLC. Promising areas to be evaluated in TLC include intensity and duration of PD needed and levels of educator support (live online educator coaching versus prerecorded instructional materials accessed by teachers, administrators, and counselors).

TLC offers data collection, segmentation and analysis to improve decision-making around PD and resource allocation beyond what is currently available in student information systems such as Aeries. Existing systems provide data and information in discrete, singular units, such as student attendance rates or limited triangulation, such as English Learners below grade level on ELA standardized tests. Orenda's PROMOTE platform, in contrast, will offer triangulated data to review *multiple* indicators simultaneously by combining areas of need within a single interface. Using evidence-based early warning indicators predictive of high school graduation and college readiness (Allensworth et al., 2014; Allensworth & Easton, 2005 & 2007; Bowers et al., 2013; Neild & Balfanz, 2006; Neild et al., 2007), Orenda created grade-level data matrices to triangulate multiple indicators to "tier" students as Intensive, Strategic, Benchmark, or Challenge, with the first two classified as below the line (in need of support) and the latter two above the line (functioning well). In this way, educators see in a glance how students are doing.

For example, counselors can use existing student information systems to run reports (separately) on student performance indicators critical to successful high school graduation and

postsecondary entry, such as enrollment in A-G classes needed for college entry or grades. Yet using Orenda's PROMOTE data platform, counselors can run reports looking simultaneously at the number of 10th grade English Learners at a school (58), the percentage placed in A-G classes (14%) and percentage completing these classes with a grade of C or better (0%). In this example, the counselor understands conditions leading to low English Learner attainment (not being appropriately placed in A-G classes), and interventions needed by subgroup (intensive tutoring so they pass with a C or better). In Guidance Alignment, the counselor will develop common agreements with other counselors and administrators to make systemic changes to conditions hindering student achievement and to work collaboratively to meet student needs.

(2) Project results disseminated in ways to enable others to use the information or strategies

Orenda has worked for over 20 years (originally as Principal's Exchange) to partner with schools to develop and disseminate solutions to accelerate student learning. Creating a fully virtual version of TLC will make it scalable and cost-effective for use by schools and districts who cannot afford our high intensity in-person model. Orenda will openly license all new content directly created with EIR grant funds, and will include new TLC digital content to an instructional resources library on our website. Orenda has partnerships with state and county offices of education, school districts, and K-12 public schools across California. Results from the interim and summative evaluation reports will be posted on our website and distributed via our email list to nearly every school district in California and many nationwide. Orenda will disseminate results and tools to educators through blogs, podcasts, Facebook, Twitter and LinkedIn - all targeted to educators who will be provided updates and information on TLC.

As part of our commitment to student achievement, Orenda regularly participates in professional trainings and seminars that have brought together thousands of educators and offer

significant dissemination opportunities for the project results. In September 2021, for example, Orenda is leading live interactive educator workshops called *Shattering Inequities: Action Steps for Equity Leaders,* with online training for teachers and school leaders to promote powerful instruction and equitable systems change. Other dissemination avenues used by our team will include presentations at state and local events such as the CA Association of Black Educators conference and the Association of CA School Administrators (ACSA) conference. Our lead evaluator, ███████, is a peer reviewer for the *Journal of Education for Students Placed at Risk* and will support dissemination of TLC findings. Dissemination will also occur through presentations at national conferences, such as the American Educational Research Association (AERA). Our project will develop a research paper on our methodology and results, which will be submitted to peer- reviewed journals such as that above, or others such as the *American Journal of Education*. This will at minimum meet What Works Clearinghouse (WWC) evidence standards with reservations and will be submitted to the WWC for consideration.

B. Quality of the Project Design; *(1) Conceptual framework underlying activities*

Multiple key components/activities in the TLC Logic Model demonstrate a rationale (Absolute Priority 1) with research findings that suggest those components are likely to improve relevant student outcomes. Please see the TLC Logic Model in Appendix G.

The first component is cycles of formative, interim assessments followed by Data Reflection Sessions (teachers and principals) to identify gaps in learning and then teachers personalize instruction accordingly for students by giving timely, specific feedback to close learning gaps. A study by Konstantopolous et al. (2013) examined impact of frequent interim assessments and monitoring on mathematics and reading. Using a clustered randomized control design, treatment teachers administered interim assessments several times a year and used results

to identify learning shortfalls, examine performance trajectories, and view predicted performance against the state test. The study found the treatment teachers had positive and significant effects in math for grades 5-6 (effect sizes of 0.31) and in reading for grades 3-5 (effect sizes of 0.15, 0.13, and 0.14) and meets WWC standards without reservations. Other research on using formative assessments to understand student needs, provide feedback, and help students set goals has found it led to enhanced student motivation and achievement (Cauley & McMillan, 2010).

A second key component of the TLC Logic Model – Curriculum Alignment – builds on the research on formative assessments with findings that embedding formative assessments within aligned curriculum can magnify the effects on student achievement. The Curriculum Alignment protocol ensures that formative assessments are embedded in the curriculum and standards, which is demonstrated to increase achievement. Yin et al. (2014) conducted a randomized control trial in which a science teacher taught both groups using identical learning materials and instructions, but only the treatment group received three formative assessments in the curriculum, followed by teacher feedback on learning gaps. In four subsequent assessments, the treatment group scored higher than the control group overall and significantly better than average on one performance assessment that required students to have a conceptual understanding of the topic. Treatment students significantly outperformed the control group in actual learning progression, that is, their development of knowledge.

An important facet of TLC is that the school administrator/principal is involved in all three tracks, not just *Lead* that focuses on school leadership. Principals participate alongside teachers in Orenda Academy training on Curriculum Alignment and High Impact Instructional Strategies so they can support the protocol and provide coaching to teachers to enhance their practice. Similarly, principals also complete Orenda Academy training on Guidance Alignment

so they can support counselors with data reflection and making SMART common agreements on interventions for students. Admin Coaching training for principals on observations, instructional coaching, and data-driven decision making sets a foundation for effective leadership.

The Wallace Foundation report, *How Principals Affect Students and Schools* (2021), synthesizes 20 years of rigorous research on principals. They identify four practices adopted by the most effective principals to support learning- all part of TLC principal capacity building. The first is *engaging in instructionally focused interactions with teachers*, which TLC supports with: principal training to act as "Head Teacher in Charge"; teacher observations and feedback/ coaching; and five annual Data Reflection Cycles with teachers. Next is *building a productive climate*, with collaboration, data engagement, a continuous improvement culture (Data Reflection Cycles & Meta Reflections), and organizational learning (Orenda Academy). The third is *facilitating collaboration and professional learning communities*, which occurs through Curriculum Alignment, Guidance Alignment, and five annual reflection cycles. The fourth is *managing personnel and resources strategically*, through Meta (school-level) and Mega (district-level) data reflection sessions to examine how student data is affected by school conditions and identify how school and district resources should be redeployed to support student success.

As discussed on p. 4, principal effectiveness has a significant impact on student outcomes. The Wallace Foundation literature review found that effects of replacing a below-average principal with an above-average one (0.18 standard deviations) will have a greater impact on math and reading achievement than 70% and 50%, respectively, of the effects on achievement of various educational interventions in 747 research studies (Kraft 2020).

Guidance Alignment uses evidence-based early warning indicators like attendance and course grades that are predictive of high school graduation and college readiness (Pinkus 2008;

Neild et al. 2007) to identify whether students are "above" (doing well) or "below" the line (need support) and target and tailor interventions accordingly. A similar intervention in which counselors used disaggregated data to identify underachieving African American students and deliver small group counseling focused on improving test performance led to a significant increase in the pass rate for African American students on high-stakes testing (from 38.7% in 2006-07 to 63.2% passing in 2007-08), and notably, also greatly reduced the achievement gap with white students, who had a 70.5% passing rate in 2007-08 (Bruce et al., 2009).

(2) Goals, objectives, and outcomes achieved by project are clearly specified and measurable

Goal 1: Develop scalable TLC systems change model to support high need schools
Obj 1a: Develop technology platforms (*eMatrix* for curriculum alignment, *Platinum Ticket* for teacher observations, *PROMOTE* to tier students for counselor interventions, *eCompass* to tier schools/districts for outreach). *Measured by completed platforms.*
Obj 1b: Record and upload professional development for teachers, administrators, and counselors to Orenda Academy. *Measured by full sequence of TLC trainings online.*
Obj 1c: Refine Curriculum Alignment, Admin Coaching, and Guidance Alignment Protocols for independent use by schools. *Measured by protocol guidance documents.*
Obj 1d: Evaluator PRG's continuous improvement tools and formative feedback enhance TLC model, tools, protocols, and training. *Measured by formative feedback reports.*
Goal 2: 15 schools adopt TLC systems change model

Obj 2a: Recruit 15 schools (5 in cohort 1 that runs 2022-2026; 5 in cohort 2 that runs 2023-2026, and 5 in cohort 3 that runs 2024-2026). *Measured by school MOUs.*

Obj 2b: Administrators complete annual sequence of equity-focused Orenda Academy training. Teachers complete training in their first year of TLC and access High Impact Strategies trainings on-demand to enhance powerful teaching Counselors complete training in their first year of TLC. *Measured in Orenda Academy by completed training modules.*

Outcome 2a: Schools are grouped into Equity Networks (based on similar problems of practice or conditions) that strengthen accountability and support for schools to implement TLC with fidelity. *Measured by monthly attendance in virtual Equity Network.*

Outcome 2b: Teachers are proficient at and engage in 5 annual Data Reflection Sessions resulting in SMART common agreements; Counselors are proficient at and engage in 5 annual Guidance Alignment sessions resulting in SMART common agreements. *Measured by completed protocol and common agreements from each session.*

Outcome 2c: Administrators effectively act as Head Teacher In Charge and improve instruction through observations, feedback, and coaching. *Measured in Platinum Ticket.*

Outcome 2d: Administrators effectively use Meta and Mega Reflections to make systemic changes at the school and district levels. *Measured by administrator questionnaire.*

Goal 3: 100% of TLC schools reduce gaps in proficiency by their 4th year using TLC

Outcome 3a: Teachers are proficient at selecting and facilitating High Impact Instructional Strategies. *Measured by administrator observations in Platinum Ticket.*

Outcome 3b: Teachers report principals play an enhanced instructional leadership role. *Measured by teacher questionnaires administered at start & end of each school year.*

Outcome 3c: Counselors improve how they target interventions based on student data and multi-tiered supports. *Measured by percent of students in the bottom two tiers each year.*

Outcome 3d: Schools uncover and address systemic inequities and barriers to student achievement. *Measured by a questionnaire administered to all TLC staff.*

Outcome 3e: By fourth year of adopting TLC, schools demonstrate improvements in: #/% of students scoring proficient and above in ELA and Math on SBAC; #/% of high school students enrolled in A-G courses for college entry in California; #/% of high school students passing A-G with a C or better; high school graduation rates. *Measured by student-level school records from participating schools.*

(3) Project design is appropriate to, and will address, the needs of the target population

TLC targets teachers, principals/administrators, and counselors, but our ultimate target populations are high-need students who are at risk of educational failure, including English

Learners, those with a disability, students living in poverty, and students of color from groups that have been historically underserved. Common target population needs include low proficiency rates in ELA and math, lower high school graduation rates, less likely to go to

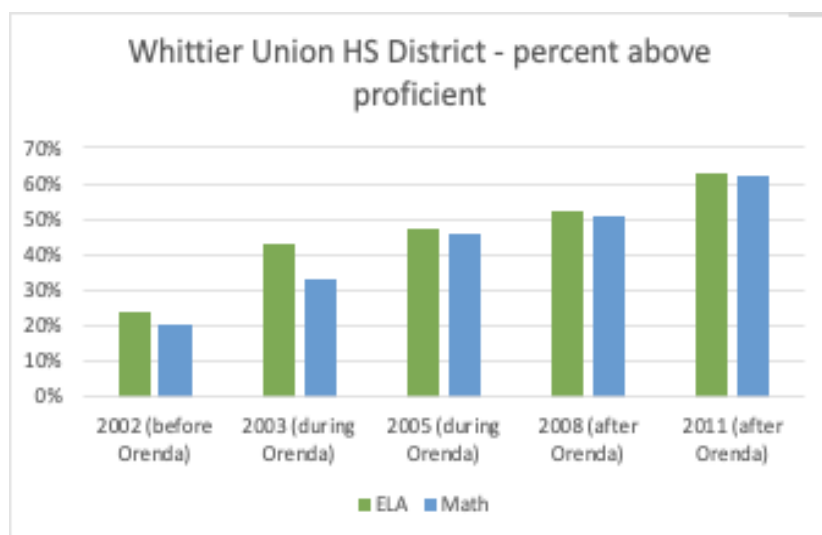San Diego County - percent below proficient ELA
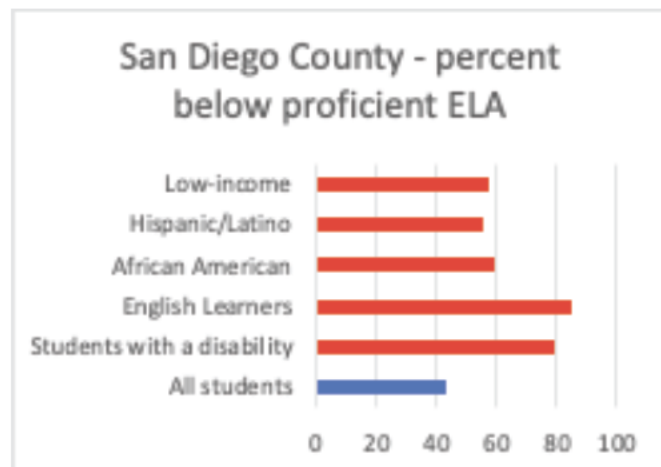
college, and more likely to experience gaps in proficiency compared to white peers, as shown by ELA data from partner San Diego County Office of Education.
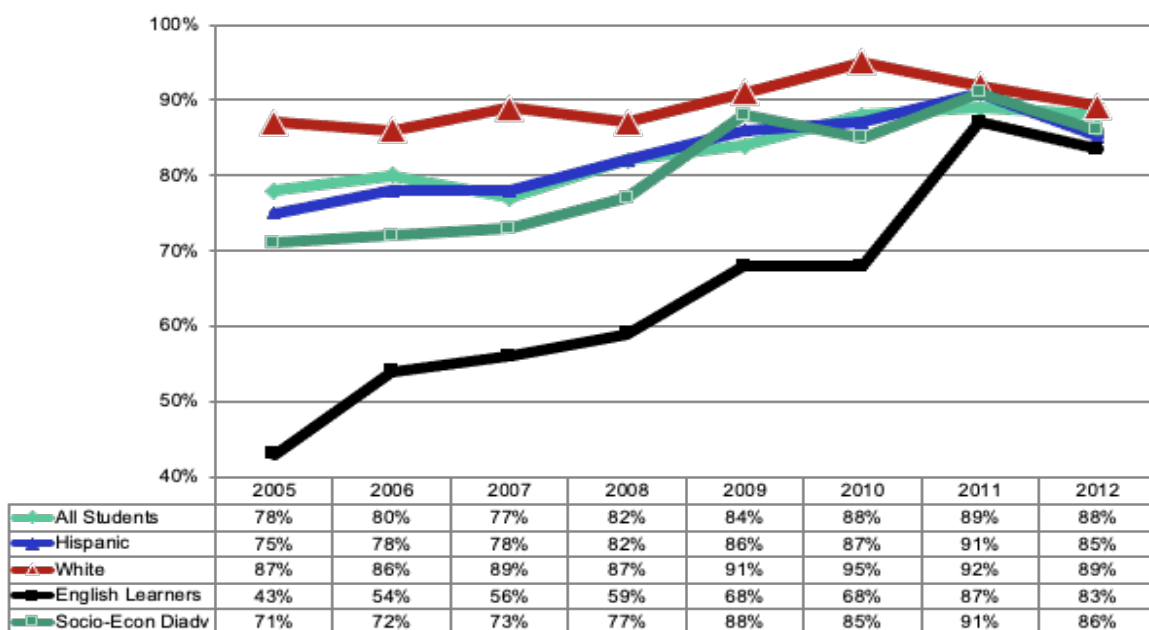
Orenda has partnered with County Offices of Education that committed to help identify and recruit schools for TLC. TLC is appropriate for high need schools with sufficient capacity and conditions to take on systems change without intensive staff support. As such, target schools must meet at least three of the following: 12-24% English Learners, 25-59% Hispanic/Latinx, 51-69% community poverty rate, 50-59% below proficient, and 81-89% graduation rate. Schools above these thresholds will not be successful without intensive staff coaching.

Orenda's traditional model to be modified into TLC has had spectacular results transforming school achievement. Elementary schools that began working with Orenda in 2015 started with an average 31-point gap between their schools' proficiency rates in ELA and the average for all white students in California. After four years with Orenda, these schools reduced this to a 24-point gap. Using predictive models based on growth rates, the Orenda-supported schools will reduce the proficiency gap to 15 points in another four years.

Schools that work with Orenda **continue their upward trajectory** even after Orenda has left. Orenda worked with all high schools in Whittier Union High School District from 2003-2005 and schools sustained systems changes and continued to improve academic achievement years after Orenda's support.

Whittier Union HS District - percent above proficient

Within target schools, we expect that subgroup data will demonstrate significantly higher need than schoolwide, as is the case with San Diego County subgroup data above. Orenda designed TLC to close these gaps in proficiency, which we know is possible when schools effectively implement Admin Coaching, Curriculum Alignment and Data Review Sessions, and Guidance Alignment - as is the case with Whittier Union High School District when looking at passage rates on the CA High School Exit Exam previously required for high school graduation. Rates of English Learners passing in math nearly doubled and reduced a 44-point proficiency gap with white peers to only six points by 2012 when the HS Exit Exam was phased out of use.

	2005	2006	2007	2008	2009	2010	2011	2012
All Students	78%	80%	77%	82%	84%	88%	89%	88%
Hispanic	75%	78%	78%	82%	86%	87%	91%	85%
White	87%	86%	89%	87%	91%	95%	92%	89%
English Learners	43%	54%	56%	59%	68%	68%	87%	83%
Socio-Econ Diadv	71%	72%	73%	77%	88%	85%	91%	86%

C. Adequacy of Resources & Management Plan; (*1) Management Plan to achieve objectives*

As the lead agency and fiscal agent, Think Together and its Orenda Education division will provide administrative oversight and grants management. Orenda is responsible for working with school and evaluation partners; monitoring and supporting activities toward the TLC goals; developing and providing technical assistance to schools; and managing fiscal matters, program implementation data, and evaluation results. Please see work plan and responsibilities of key

staff below. Orenda relies on data partnerships and continuous quality improvement, including

formal Data Sharing Agreements with each school that establish the framework for services.

Tasks / *Milestones*	Timeline	Resp. Party
Year 1 (1/2022- 12/2022)		
Hire staff, recruit schools, *execute PRG subcontract, develop eval tools/protocols, finalize Guidance Alignment, Admin Coaching, develop Curriculum Alignment*	Jan- June	Project Director
Register plans on REES; Obtain IRB exemption; Develop teacher/ administrator outcome questionnaire, fidelity monitoring, continuous improvement, *finalize evaluation design*	Jan - June	PRG
Cohort 1 selected with 5 treatment schools and 5 comparison. *Execute Memoranda of Understanding and Data Sharing Agreements with partner districts/schools.*	April - June	Orenda, PRG, schools/districts
Administer baseline staff questionnaires to treatment and comparison schools for Cohort 1 prior to start of services. Collect baseline student outcome administrative data for 2021-2022 school year (Cohort 1).	June	PRG
Schools conduct and *complete Equity Study* prior to start of services (occurs annually for each new cohort)	June	Orenda, schools

Launch Admin Coaching - principals complete Orenda Academy training for Lead track	July - Aug	Orenda, schools
Schools are placed in Equity Networks	Aug	Orenda, schools
Launch Guidance Alignment - counselors complete Orenda Academy Training	Aug - Sept	Orenda, schools
Admin Coaching and Guidance Alignment implemented at 5 checkpoints annually	Sept - May 2023	Orenda, schools
Complete Curriculum Alignment components and tools	By Dec	Orenda, schools
Year 2 (1/2023- 12/2023)		
Launch Curriculum Alignment for Cohort 1	Jan	Orenda, schools
Teachers complete Orenda Academy training on Curriculum Alignment and High Impact Strategies.	Jan - Mar	Orenda, schools
Cohort 1: continue Admin Coaching, Guidance Alignment. Cohort 2: recruit 5 treatment and 5 comparison schools. *Complete MOU, data sharing agreements*	Mar- May	PRG
Cohort 1: administer follow-up teacher/administrator outcome questionnaires; collect programmatic implementation data, conduct staff qualitative interviews	May	PRG
Admins complete part 2 of Orenda Academy training	June-July	Orenda, schools

Cohort 1: collect student administrative data (2022-23); review implementation findings, *provide formative feedback* used to improve model for 2023-24 iteration.	June-July	PRG
Cohort 2: Administer baseline teacher/administrator outcome questionnaires and collect baseline student outcome administrative data for 2022-2023 school year	June-July	PRG
Cohort 1 continues TLC. *Cohort 2 begins TLC* with all three components launching simultaneously.	Aug - Dec	Orenda, schools
Year 3 (1/2024- 12/2024)		
Cohorts 1 and 2 continue TLC	Jan - May	Orenda, schools
Cohort 3: recruit 5 treatment and 5 comparison schools. *Complete MOU, data sharing agreements*	Mar - May	Orenda, schools
Cohorts 1 & 2: administer follow-up teacher/ administrator outcome questionnaire; collect programmatic implement. data, conduct staff qualitative interviews. Cohort 3: baseline teacher/administrator outcome questionnaires	May	PRG
Cohorts 1 & 2: collect student admin. data for 2023-2024; review implem. findings and *formative feedback*. Cohort 3: collect student administrative baseline data for 2023-24.	June - July	PRG

Cohorts 1 and 2 continue TLC. *Cohort 3 begins TLC* with all three components launching simultaneously.	Aug - Dec	Orenda, schools

Year 4 (1/2025- 12/2025)		
Cohorts 1, 2, and 3 continue TLC	Jan - Dec	Orenda, schools
Cohorts 1, 2, & 3: administer follow-up teacher/ administrator outcome questionnaire; collect programmatic implementation data, conduct staff qualitative interviews	May	PRG
Cohorts 1, 2, & 3: collect student admin. data for 2024-25; review implementation findings, *formative feedback*.	June - July	PRG

Year 5 (1/2026- 12/2026)		
Cohorts 1, 2, and 3 continue TLC	Jan - Dec	Orenda, schools
Cohorts 1, 2, & 3: administer follow-up teacher/ administrator outcome questionnaire; collect programmatic implementation data, conduct staff qualitative interviews	May	PRG
Cohorts 1, 2, & 3: collect student admin. data for 2025-2026; review implem. findings and *formative feedback*.	June - July	PRG
Conduct final impact analyses, summative evaluation report	Aug - Dec	PRG

Management Tasks (1/2022- 12/2026)		

School meetings for feedback, data review, discussions	Quarterly	Orenda, schools
Evaluation Team Meetings	Quarterly	Orenda, PRG
Grants Management meeting to assess programmatic successes and challenges, create action plans	Annually	Orenda, PRG
Evaluate performance relative to annual benchmarks and *report progress to U.S. Dept of Education*	Annually	Director
Formative evaluation feedback memos	Annually	PRG
EIR Project Director meetings	Annually	Orenda

Orenda has comprehensive quality, fiscal, and administrative controls in place to monitor the grant, and utilizes procedures to ensure that services are provided as specified and in compliance with grant requirements. Reporting to the Think Together Board of Directors, Orenda's CEO, ███████████████, and Senior Director of Operations, Janet Hwang, exercise oversight of services to ensure that core program objectives are achieved and programs are accountable for all awarded funds. Orenda will use the same accountability framework as in place at schools when implementing the TLC model to assess and track EIR grant progress.

Project staff led by the full-time Data Collection Analyst will collect data to track progress. The Director will create an annual Grant Tracker that breaks down annual goals, objectives, outcomes, and outputs into quarterly benchmarks to allow for regular project monitoring and permit rapid course corrections.

For financial review, evaluation and reporting, the Director will work with the Think Together Chief Financial Officer, Mike Frobenius, who has experience with grant awards from the U.S. and California Departments of Education. This includes review of annual budget and grant/contract compliance. The Director meets monthly with the CFO to review and track expenditures. The Manager will incorporate financial deadlines (quarterly and year end reports) into the Tracker and work with a TT Financial Analyst to provide monthly itemized expenditures reports to track expenditures and ensure that program is on track with budget and deliverables that will populate reports. These are then reviewed by the Director and CFO prior to submission.

(2) Qualifications, including relevant training and experience, of key project personnel.

The Director is hired upon award and will be in place in the first two months. Janet Hwang, the Orenda Senior Director of Operations, will serve as Interim Director at award.

Staff Name/ Position	Responsibilities and Qualifications
Project Director - to be hired (federally funded); Janet Hwang, Interim Director upon award (leveraged)	Recruitment, selection, and staff management while working with partners. Monitor budget status in line with activities working with CFO; manage tracking and reporting; ensure accurate records; liaise and coordinate activities with partners. Maintain and develop knowledge of TLC systems change measures; attend needed conferences. Minimum education qualifications include at least a Master's degree in Education and/or Educational Administration with 10 years' administrative/managerial experience. *Hired within two months of project award.*

Robin Avelar LaSalle, CEO- Orenda Division (leveraged)	Lead creation, development and implementation of TLC model and research base working with districts and schools. PhD in Education and 24 years' leadership of Orenda services.
Senior Operations Consultant (Leveraged)	Leads strategic planning on curriculum development of TLC model services with coaching of education personnel in schools and districts. Master's in School Administration and over 25 years educational administration experience.
Data/Technology Lead (1) Senior Director, Educ. Technology (1- leveraged)	Leads implementation of technology for online support and data tools used in TLC with partnering schools. BS in Business Management or Administration and at least 10 years' experience in educational technology implementation and use.
Education Software Programmer/Developer	Analyze needs and design, test, and develop TLC software; create models and diagrams that software code needed; lead software maintenance and testing, with documentation. Collaborate with Achievement Specialists in design and implementation. Minimum BS degree in computer science with applications/software experience (or equivalent experience). At least three years' experience in software design and maintenance.

Achievement Specialist (8)- (Seven leveraged by Think Together and Orenda, one federally funded)	Provides guidance on making online professional development, coaching, mentoring to partner schools/districts. Facilitates curriculum/guidance alignment process; conducts online workshops/ professional development; facilitates creation of common unit assessments and data reflections; models lessons and planning. Master's degree. Minimum five years' educational administrative/teaching experience.
Chief Financial Officer, Mike Frobenius (leveraged)	Lead and review all financial reporting and budget review working with the Project Director monthly. Bachelor's in Accounting, a California Certified Public Accountant (CPA) and a member of American Institute of Certified Public Accountants.
Data Collection Analyst- TBD (leveraged)	Work closely with Project Director and Evaluator to gather essential data of school performance in TLC. Requires at least two years' experience in education programs.

Partners	Key Personnel
San Diego County Office of Education	███████████, Superintendent of Schools
Ventura County Office of Education	███████████, Superintendent of Schools
Monterey County Office of Education	███████████, Diretor of Leadership & School Systems

		The Policy & Research Group-independent evaluator	███████████ (PI), Director of Research; Katie Lass, MPH, LMSW, Senior Research Analyst; Research Analyst, Research Assistant

(3) Costs are reasonable in relation to objectives, design, and project potential significance

The total project cost over five years is $4,425,004 ($3,996,008 in federal funds plus 10% match of $428,996). Please see the budget narrative for a breakdown of these costs, including justification for how they are reasonable. In terms of project objectives, these costs are reasonable considering the project includes the development of four sophisticated data platforms that will be able to import data from sources like the California Department of Education and each school's Student Information System, as well as integrate algorithms to use that data to "tier" students and schools for interventions. The project will also require expertise from multiple educational experts on ELA, math, High Impact Instructional Strategies, and school data systems to develop protocols, training content, and Equity Network facilitation.

In terms of project design, our costs are extremely reasonable considering we plan to work with a total of five schools that will start in 2022, five to start in 2023, and an additional five to start in 2024. California has an average of 31 teachers per school ("Fingertip Facts on Education," CDE 2019-20) and an average teacher to student ratio of 1:35. The estimates in the table below reflect these averages, and demonstrate the vast reach the project will have with high need students, while achieving a lower cost per student over time.

	2022-23	2023-24	2024-25	2025-26
# of students reached	5,425	10,850	16,275	16,275

Cost per student	$139	$74	$51	$51

The TLC national significance cannot be understated. Orenda's in-person systems change model has seen great success with schools (see pp. 13-15), and developing it into an online format will increase accessibility through lower costs and geographic flexibility for schools.

(4) Adequacy of procedures for ensuring feedback and continuous improvement in operation

Think Together and Orenda place a premium on using data for decision-making and continuous improvement – that is at the heart of TLC and will be infused into grant management procedures as well. There are two levels of continuous improvement in the project. The first is discussed above in the management plan (pp. 15-20) and will ensure grant compliance.

The second is supporting schools to continuously improve how they are using protocols and the nested data systems – Data Reflection Sessions by teachers about students, Guidance Alignment reflections by counselors about students, Meta Reflections by principals about grade levels, and Mega Reflections by administrators about schools. These data systems and five annual reflection cycles allow schools and Orenda to see how they are doing across these levels and continuously adjust their efforts to improve support for students. In an example from Orenda's work, a counselor in a Guidance Alignment reflection noticed that students of color were under-enrolled in A-G courses needed for college entry. Upon digging deeper, they found these students were automatically being placed into Integrated Math I even though they had already passed Algebra with a C. The school changed its course enrollment policy so all students who passed Algebra were automatically assigned to the next higher level math class.

Equity Network meetings also support continuous improvements, as schools will share challenge areas and coach each other on successful best practices. Peer coaching is supplemented

with virtual coaching from an Orenda educator for higher need schools. Evaluator PRG's annual formative assessments will be used to continuously improve training, protocols, and systems.

D. Quality of Project Evaluation *(1) Evidence of effectiveness that meets WWC standards*

Orenda Education has engaged The Policy & Research Group (PRG) as independent evaluator (see letter in Appendix C). The logic model (Appendix G) hypothesizes how the TLC initiative, a transformative school systems change model, will improve student-level academic achievement outcomes and school leadership practice. The evaluation will test these hypotheses using: 1) a quasi-experimental, comparison group design to draw causal inferences about effects (impact) of TLC and 2) an implementation evaluation to understand how TLC works in practice, interpret initiative efficacy, provide continuous improvement feedback, and identify conditions for sustainability, replication, and scaling. The impact evaluation investigates whether offering TLC to administrators, teachers, and support staff at high-need, high-resource K-12 schools in California impacts school leadership practice and students' educational outcomes. The impact evaluation will produce evidence that **will meet the What Works Clearinghouse (WWC) evidence standards** *with reservations.*

Research questions. We are proposing to answer *three confirmatory (primary) research questions:* **1)** As compared with high-needs students at comparison schools, what is the impact of TLC on high-needs students' academic achievement (as measured by % earning a C-average or better in A-G and % scoring proficient and above in ELA and Math on SBAC) after two school years of implementation?; **2)** As compared with instructional and support staff at comparison schools, what is the impact of TLC on staff's perceptions of school leadership practice (as measured by perceptions of leadership's effectiveness to enhance curriculum and address systemic inequities to student achievement) after two school years of implementation?;

and **3)** As compared with students at comparison schools, what is the long-term impact of TLC on student achievement outcomes (as measured by % scoring proficient or above in ELA and Math on SBAC, % earning a C-average or better in A-G, graduation rates) after four years of implementation at the subgroup of schools (Cohort 1) that implement TLC for four school years? The confirmatory study will investigate the extent to which TLC addresses needs of high-needs students and staff perceptions within the first two years of implementation and the extent to which there is promising evidence to support the hypothesis that TLC improves school performance among all students after four years of implementation. In addition, we propose to answer *four exploratory (secondary) research questions:* **1)** What is the impact of TLC on high school students' college readiness (as measured by % of high school students enrolled in A-G courses and % passing A-G courses with a C or higher)?; **2)** What is TLC impact on reducing gaps in academic proficiency between students of color and white students?; **3)** To what extent do confirmatory impacts vary by students' baseline academic performance and demographic characteristics (subgroup analyses)?; **4)** To what extent do components of fidelity of implementation (i.e., adherence, quality, experiences of control group, and context) impact effect of TLC on students' outcomes? The exploratory research will go beyond the confirmatory impact findings to determine not just whether the model is effective at improving the identified student and staff-level outcomes, but if the initiative works, for whom it works and under what circumstances it is most/least effective. These questions should have value for future development and to provide guidance and inform future replication efforts. The impact study design and methods will meet **WWC evidence standards** *with reservations.*

   Sample identification/selection, sample size, and minimal detectable effect size.
Approximately 15 K-12 schools will be selected to adopt the TLC model in the 2022-23 (Cohort

1), 2023-24 (Cohort 2), and 2024-25 (Cohort 3) school years. Students and staff will be selected into the treatment sample if they attend a school that is participating in TLC. While Orenda and PRG considered a school-level random assignment design, we determined that the proposed QED better aligns with TLC, which utilizes a Vulnerability Index to identify high-need schools within a district. The comparison group will be students and staff who are attending equivalent schools (i.e., those that meet the Vulnerability Index criteria outlined on p. 13), either in the same district or in a neighboring district, and who have similar baseline and background characteristics (e.g., students that share background and achievement characteristics of treatment students); propensity score matching or weighting will then be used to maximize the equivalence of these two groups on observed and theoretically relevant baseline characteristics. As described in the project's goals and objectives, Orenda aims to recruit 5 schools to begin implementing TLC in the 2022-23 school year (Cohort 1), followed by a second and third cohort of 5 schools beginning in 2023-24 and 2024-25 each. Given this strategy, we anticipate that the confirmatory impact analyses (RQ1 and RQ2) will consist of 15 schools who implemented TLC for at least 2 years; confirmatory RQ3 impact analyses will include the subgroup of 5 Cohort 1 schools that that were able to implement TLC for four school years. Assuming an average of 31 teachers at each school, each with a class of 35 students, we anticipate a total student sample of 16,275 students and total staff sample of at least 465 at treatment schools. Based on several standard assumptions and reasonable expectations this study should yield a Minimal Detectable Effect Size (MDES) of at most .04 (Hedges' *g*) after four years of data collection[i] for student outcomes. The analytic sample (16,275 students at TLC schools and 16,275 matched comparison students) will be adequately powered to detect an effect of this size. This estimate represents the highest

possible MDES, with the most conservative assumptions applied. The staff analytic sample (465 at treatment schools and 465 at comparison schools) should yield an MDES of 0.17 (Hedges' *g*).

Prior to conducting propensity score matching or weighting to optimize the balance of comparison and treatment students, PRG will pre-screen the student pool for initial eligibility. Empirical research finds that pre-screening is essential to reduce unobserved selection effects (Song & Herman, 2010; Glazerman et al 2003; Cook et al 2008). These student pools will be students at the comparison schools in same year as treatment students (i.e., no time confound) attending schools that are: 1) similar to a treatment school in relevant and observed characteristics (e.g., 12-24% English Learners, 25-59% Hispanic/Latinx, 51-69% community poverty rate, 50-59% below proficient in math and ELA, and 81-89% high school graduation rate) and 2) in the same district or a similar/proximal district. Once pools have been selected and baseline data gathered from participating (treatment and comparison) pools, but before outcome data are examined, PRG will implement individual-level matching or weighting procedures. Specific procedures will be finalized in research design prior to receiving outcome data, but PRG will likely use propensity score weighting or matching to select an observational comparison group that is equal in expectation to the treatment group (i.e., renders treatment assignment ignorable, conditional on propensity score). Alternative strategies include Mahalanobis distance matching, which is preferable when there are fewer baseline covariates and reason to prioritize one or more variables in the prediction of the distance score. The evaluators will produce descriptive statistics of all relevant baseline variables of interest after matching to verify covariate balance. We will validate this with baseline equivalence diagnostic tests (using standardized mean differences) on observed baseline variables that are highly predictive of the outcome variables (i.e., pre-intervention grades, assessments) as is specified by What Works

Clearinghouse review standards. As per WWC standards, and the Study Review Protocol (January 2020) baseline equivalence of the treatment and comparison samples will be established for the analytic sample on the basis of the pre-test measure of the outcome, or an equivalent outcome within the same domain (at minimum). Similar pre-selection and weighting/matching strategies will be implemented for the staff study sample using the baseline questionnaires.

Outcome measures and data collection. To measure impact of TLC (RQ1 and 3), PRG will collect primary outcome data from student-level educational records, obtained from school districts participating. Educational outcome data will be requested by PRG from the school districts in the summer following each year of implementation; Data Sharing Agreements with each district will be formalized in the first year of the grant. We summarize data sources, collection methods, timelines, and analytic approaches by research question in Appendix J.

PRG will also collect staff-level outcome data from a *Staff Outcome Questionnaire* to collect self-reported measures of quality of school leadership from staff at treatment and comparison schools for confirmatory RQ2. All items and scales used for outcome measurement will be composed of measures that have been used and validated in published research (e.g., Vanderbilt Assessment of Leadership in Education). The same questionnaire will be administered by PRG at baseline (during the summer prior to or within one month of the beginning of the school year) and again at the end of the second school year (follow-up).

Analytic approach. Contrasts in academic outcomes will be analyzed at the individual-level, employing a difference-in-differences (DID) approach. For each student, we will use a single pre- and single post-intervention observation, and measure the impacts of the intervention as the average "difference in differences" between the treatment and comparison groups.[ii] We will estimate the academic achievement DID impact with a multi-level model that includes

covariates plus random and fixed effects for grades and schools. Covariates will be grand-mean centered for analysis. With few identifying assumptions, the DID model produces a point estimate of impact that represents the mean difference in pre-to-post intervention change for both groups. The estimate of impact is the coefficient value for the interaction term in the estimating model. We will infer impact if that term is significant and meaningful in magnitude. PRG will conduct **baseline equivalence** testing on demographic and outcome data gathered at baseline, including pre-intervention assessments and grades. Exploratory sub-group analyses for students will be analyzed similarly. To assess long-term impact of TLC, we will employ a DID modeling strategy to estimate the impact on the Cohort 1 students who attend schools that complete four years of programming. To assess the degree to which impact varies among students with different characteristics, similar analyses will be conducted on sub samples of students who reflect different demographic and baseline achievement indicators. Different comparison samples will be generated, though matching/weighting procedures will be identical. An identical analytic approach will be conducted to address the research question related to staff outcomes.

(2) Methods provide performance feedback, assess progress towards achieving outcomes.

Methods for implementation study. PRG will design and conduct an implementation evaluation to understand variation in how TLC works in practice, interpret the efficacy of the initiative, provide feedback for continuous improvement, and identify conditions necessary for sustainability and replication. The implementation evaluation will assess and report on: adherence, quality, comparison group experiences, and contextual factors. Implementation data will be reported to Orenda annually as formative feedback. Fidelity measures will include persistence in utilizing components and fidelity surveys/qualitative interviews for TLC school staff following each implementation year. Annual thresholds will be set for each key component

depicted in the logic model as specified in Appendix G and will be assessed and reported on annually. Please see *Implementation Evaluation Summary Table* in Appendix J. Quantitative data, such as dosage/persistence data and close-ended questions from feedback survey, will be analyzed descriptively. To analyze qualitative data gathered in interviews and open-ended survey questions, the evaluators will use a grounded theory approach. This approach allows evaluators to conduct flexible yet focused qualitative analysis through a systematic coding process to identify emergent themes and meaningful patterns of ideas in the data (Charmaz, 2006).

Qualifications of independent evaluator. PRG has led over 60 federally-funded evaluations, including 14 quasi-experimental studies (two funded by the U.S. Department of Education). ███████████, PI, received his *What Works Clearinghouse Certification* for group design standards in 2014 from the Department of Education Institute of Education Sciences. He has over 15 years' experience supervising rigorous evaluations and serves as a peer reviewer for the *Journal of Education for Students Placed at Risk*. He will be assisted by Katie Lass, MPH, a PRG Senior Research Analyst, one other research analyst, and a research assistant. Descriptions of PRG and other evaluation staff's qualifications and experience are included in Appendix B.

(3) Contribution of project to increase knowledge of educational problems/effective strategies.

Please see pp. 26-27 with three confirmatory and four exploratory research questions that, once assessed by PRG, will contribute actionable knowledge to the field. Exploratory research will go beyond confirmatory impact findings to determine not just whether the model is effective at improving identified student and staff-level outcomes, but if the initiative works, whom it works for, and under what circumstances it is most/least effective. The questions should have value for future development and to provide guidance and inform future replication efforts.

[i] Effect size estimates are calculated with Optimal Design and reflect the following expectations: power (B) = .80, significance (a) =.05 and a two-tailed significance test, with a random effects model to account for the nested/clustered structure of the data (rho=.20). Estimates also include the expectation that covariates (including the pretest) should explain at least 20% of the variation of the outcome, which is conservative.

[ii] The DID approach is common in quasi-experimental evaluations aiming for causal inference in which there are important missing unobserved variables. If assumptions of the model are met, the regression based DID approach is preferable to the alternative Comparative Short-Interrupted Time Series (CSITS) design for its parsimony. The approach adjusts for mean differences in baseline values of the outcome (rather than something more complicated) and is interpretively straight-forward because it produces a single point estimate of program impact. The DID approach is more robust than controlling for "pre-test" scores (i.e., as an independent variable) because pre-program outcomes are modeled as a group-level fixed effect. The major limiting assumption of a DID approach is that the treatment and comparison groups experience similar baseline trends. The use of propensity score matching/weighting will address this concern by creating two groups that are as similar as possible on observed characteristics. (See for example: Angrist & Pischke, 2009; Schlotter et al., 2010; Antonakis et al., 2010; Murnane & Willett, 2011.)