



Scaling a Successful Pilot to Expand Blended Learning Options Citywide



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CEE-TRUST

The Cities for Education Entrepreneurship Trust



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Introduction

City-based organizations are playing pioneering roles in the development and implementation of blended learning initiatives.² As more of these initiatives demonstrate early successes, their leaders and backers are turning their thoughts to replicating and scaling their efforts to improve student outcomes across their cities. But growth brings new challenges, including:

- **Recruiting and retaining leaders and staff members** with relevant expertise in sufficient numbers to support and sustain growth;
- **Developing systems** to facilitate efficient replication of initial efforts' key elements and help expanding initiatives realize economies of scale;
- **Analyzing early successes** to determine which aspects of initiatives correlate with success and should be maintained or expanded, and which should be modified or eliminated;
- **Effecting state and local policy changes** that pave the way for replication of proven initiatives or that enable improvements upon early iterations of initiatives;
- **Improving practices that impede success** within schools and classrooms, by sharing what has worked in successful initiatives' early efforts;
- **Maintaining innovation** while scaling key elements of initial successes; encouraging fidelity to a model while supporting iteration to make the model stronger;
- **Remaining grounded in school- and classroom-level realities** and anticipating variations across sites based on differences in school culture, leadership, and student populations.

This white paper—commissioned by the Cities for Education Entrepreneurship Trust (CEE-Trust)—examines potential responses to the challenges of growth by examining four approaches to scaling a successful blended learning initiative. Any of these approaches might be used alone or in combination with others, but the most promising efforts will be those that combine elements from all four approaches into a coherent, overall strategy.

Four Approaches to Scaling a Successful Blended Learning Initiative

1. **Expand blended learning to additional schools and classrooms.** Replicate successful models in additional schools and classrooms, and extend pilots to continue experimentation with new models.
2. **Develop systems and talent for scale.** Build out the information technology, human capital, financial, and operational infrastructure necessary to fuel and sustain expanding blended learning initiatives.
3. **Advocate for policies that support expansion of high-quality blended learning initiatives.** Provoke action by networking key stakeholders, drafting policy briefs and other documents to educate and influence policymakers, and generating positive media exposure for successful efforts.
4. **Amplify the voices of educators in efforts to influence policy and practice.** Give teachers the support and resources they need to lead collaborations with their peers and hold public conversations about changes to existing policy and practice grounded in their experiences with blended learning initiatives.

Scaling a Successful Pilot in Oakland— the Rogers Family Foundation

The **Rogers Family Foundation** (RFF) is a grant-making foundation that supports education and youth development efforts in and around Oakland, CA. RFF has played a pioneering role in Oakland Unified School District's implementation of a blended learning pilot.³ Now, it faces the challenge of scaling the initiative's early success.

Beginning in 2009, RFF observed increased interest among grant applicants and the Oakland Unified School District (OUSD) in using technology to improve student outcomes. RFF analyzed the emerging area of blended learning and the resources necessary to support its success. It concluded that, through differentiated content, small-group work, data-driven instruction, and student ownership of learning, blended learning showed strong potential to increase student achievement and teacher efficacy. In 2011, RFF gauged school-level interest, conducted site visits, and ultimately selected four traditional public schools for a blended pilot.⁴ After a year of planning with pilot teachers, key OUSD leadership, online design partners, and third-party blended learning experts, the schools began piloting personalized blended learning models in the fall of 2012.

The initiative already shows promise: pilot teachers report higher levels of engagement among students and the ability to more efficiently use school time.⁵ In addition to this initial observed success, RFF has learned invaluable lessons about the logistics of implementing blended learning models in traditional public schools. Both the foundation and the district are now well on their way to understanding the extensive infrastructure and staffing needs of blended schools. They have observed first-hand the scheduling, classroom planning, and technology challenges that come along with blended learning, and they have worked closely with teachers to identify ways to resolve these issues. Informed by this implementation experience, RFF is now in a strong position to focus on *expanding* blended learning models in Oakland. RFF's experience and strategic decision-making processes led to the writing of this white paper and significantly informed its content.

Approach 1: Expand blended learning to additional schools and classrooms

Perhaps the most natural approach a city-based organization can consider to scale a successful pilot is to expand or replicate it in additional classrooms and schools. However, narrow leader and educator pipelines may limit expansion. And with replication, implementers also face the challenges of discerning what worked in the pilot, what stands to be improved, and what can be set aside without diminishing effectiveness. Scale-up efforts may stifle innovation by requiring strict adherence to underdeveloped or insufficiently tested ideas. At the same time, the essence of replication is sticking with a set of non-negotiable elements that were central to the success of the initial effort, in order to retain the benefits of those elements in the expanded initiative. The following strategies can help organizations confront these challenges when scaling their initiatives.

- **Incubate blended school or program leaders.** Create opportunities to expose more prospective leaders to blended learning. Recruit, train, and support these leaders as they prepare to implement blended models at new sites.
- **Train staff to support successful implementation.** Blended models will require many more people than just school or program leaders to take on new duties and perform them well. Successful expansion will require preparing all key staff for new roles.
- **Thoughtfully replicate current blended models.** Analyze existing models to identify the most effective program elements and procedures. Work with promising new leaders and staff to implement these components in more classrooms and schools.
- **Iterate within existing models.** In addition to replicating what is effective, study weak program components in existing sites and make changes to improve them. Document changes made and approaches taken to benefit future development of all sites.
- **Seed new pilots.** Continue to seed entirely new efforts grounded in the theory and goals that led to the original pilot. For example, a foundation might issue an RFP for grant funding to support new blended model implementation based on a set of core principles. Grantees would bring fresh thinking and deep knowledge of their own school or classroom contexts, but the RFP would extend the impact of the pilot to these sites through the core principles.
- **Consider supporting expansion via districts and charters.** A supporter of a pilot in a district or a charter network might consider expansion in both types of schools, leveraging strengths of each type. For instance, charter school autonomies may make it easier to try out new models, and the large scale, established systems, and comparatively larger and more reliable funding of districts may offer the space and resources to replicate successful innovations.

Approach 2: Develop systems and talent for scale

Expanding initiatives require complex infrastructure and growth-oriented leaders that are not as necessary in the early stages of a pilot. As a program scales, it needs increasingly sophisticated information technology, human capital, financial, and operational systems to ensure efficiency and quality.⁶ Without these underpinnings in place, and staff to support them, programs may be severely hampered when they reach a critical number of sites.⁷ The following strategies can help build systems and talent in anticipation of growth without sacrificing sustained early-stage program quality.

- **Develop early systems and processes with growth in mind.** The right time to invest in systems for growth is during early stages of expansion, not after years of cobbling together systems that may or may not be consistent across sites or built to handle growth. Supporting system development is an important role for *external funders* to play because resource limitations are likely to stifle attempts by schools and districts to dedicate funds to develop systems necessary for growth.⁸ Investments might focus on IT, facilities, or training for teachers and leaders.
- **Support “system builders.”** Research indicates organizations that scale successfully invest resources in management talent through training, development, and retention of excellent employees.⁹ Blended learning programs should look to maximize the long-term impact of pilot program leaders by nurturing their ambition and rewarding them for their efforts. They should also aim to bring on or develop those with interest and expertise in facilitating growth.
- **Invest in innovation.** Successful growers dedicate time and talent resources specifically to support continued innovation.¹⁰ Blended leaders must get in the habit of moving beyond today’s successes to focus on tomorrow’s new breakthroughs. To achieve this, an expanding program should build a network of innovators to engage constantly in fresh thinking and vet new ideas.
- **Form operational alliances with others who are driven to grow.** Building systems can be a time- and resource-intensive process. At early stages, when system development for growth is most crucial, programs are most likely to be strapped for both time and resources. Cooperation, even with would-be competitors or untraditional allies, can help a program realize economies of scale more quickly, share purchasing power, and grow more rapidly and wisely. Potential partners could include service providers, districts or charter networks, and local businesses. Alliances can also unite disparate entities to advocate for supportive policies (see Approach 3, below).¹¹
- **Build a community of advocates for expansion.** Capitalize on support within successful schools and programs to introduce potential expansion site leaders, teachers, and families to the benefits of blended learning. Building communities of advocates can help recruit the leaders, staff, students, and families that will lead and benefit from successful expansion.

Approach 3: Advocate for policies that support expansion of high-quality blended learning initiatives

Blended models will test existing policy regimes, which are tied to traditional school systems and classroom operations. For example, most states and districts today require students to spend a defined amount of time in a course in order to complete it (“seat time” rules), but some blended learning models base course completion on demonstrated student competency or mastery, which may take students different lengths of time to achieve. And assessments in traditional models are administered via end-of-year summative tests, while blended models may use frequent, formative assessments administered throughout each course to track and guide student learning.

Traditional policies will need to either bend or be remade to fit new models. The following strategies, which have been used by successful education advocacy organizations to educate policymakers in other contexts, might also be used to advocate for policy changes needed to accommodate blended models, paving the way for more rapid and effective expansion.

- **Convene key stakeholders to push for policy change.** Supporters of blended learning can work with knowledgeable teachers, school leaders, students, family members, supporters, partners, and community leaders to host and facilitate events at which attendees learn from and interact with key stakeholders to set strategic priorities, hone messages, and influence policymakers.
- **Encourage action by drafting policy briefs and other documents.** Policy guides, issue briefs, one-pagers, and other, similar documents focus attention on important issues for busy policymakers, and can cut through the noise of often-contentious public debate. They also inform stakeholders and interested community members who would like to engage in advocacy. And they offer a common language for all advocates to use when discussing proposed reforms.
- **Generate positive media coverage.** Media exposure raises public awareness and can offer a point of leverage for advocacy and leadership. Stakeholders can communicate recommended policy changes through op-eds, newspaper articles, and a prominent social media presence, which can bolster public support and increase pressure on policymakers to act.

Policy advocacy is outside the core expertise of many city-based organizations, including funders, and they therefore may not have the internal capacity to execute complex policy advocacy initiatives. In addition, the tax status of many city-based organizations may render them legally unable to engage in direct advocacy.

Educators 4 Excellence (E4E) and Teach Plus are two multi-city organizations engaged in advocacy and policy debates that are also amplifying the voices of teachers in efforts to influence policy and practice (see Approach 4, below). We describe their efforts in the sidebar, “Teacher-led Advocates for Education Policy Change and How They Get the Job Done.” The work of these organizations requires significant resources: among other things, organization staff must possess and maintain a deep understanding of local policies and the research and theory supporting alternatives, the ability to network effectively with policymakers, and the time and savvy to work closely alongside teachers, empowering them with information and support, and helping them to establish strong positions and advocate effectively to drive policy change grounded in their classroom experience and practice. Because of the specialized expertise and focus required, we recommend that funders and other city-based organizations consider supporting the existing work of organizations such as these, or partnering with them in their cities.

Teacher-led Advocates for Education Policy Change and How They Get the Job Done

Educators 4 Excellence (E4E) is a growing teacher-led advocacy organization that “works to ensure that the voices of classroom teachers are included in the decisions that affect our profession and our students.”¹² E4E’s programming model centers on three core activities:

1. **Learn:** Provide teachers timely, relevant information, including recent research and policy developments at the district and state levels. E4E also analyzes this information for teachers so they can quickly distill its implications for them and their students.
2. **Network:** Bring teachers together with likeminded colleagues and policymakers. E4E organizes monthly policy-focused, interactive events connecting policymakers with teachers. These events utilize audience response technology to gather instant teacher feedback, which the policymaker can then use to inform policy development. E4E also holds smaller, more frequent school-based networking events so teachers can connect with other teacher-advocates and engage with policy questions.
3. **Take action:** Convene “Policy Teams” of teachers who want to drive advocacy on local policy issues. E4E surveys teachers to understand their policy priorities and assists the policy teams with selecting issues. Policy Teams then look at research and models in other states and districts, as well as results from E4E member surveys, to develop policy recommendations and advocacy campaigns. E4E also supports teachers with demonstrated leadership qualities to serve as “School Captains.” School Captains are trained on a variety of advocacy strategies, including how to have their voices heard in the media, organize at the grassroots level, and manage difficult conversations.

An example of these strategies at work is E4E’s recent involvement in advocating for improvements to the Los Angeles teacher evaluation system. After hearing from hundreds of Los Angeles teachers through focus groups and surveys that improving teacher feedback and support was a top-of-mind issue, E4E convened a Policy Team of nearly 20 diverse teachers to tackle the issue. E4E connected the Los Angeles Policy Team with top research, helped them conduct polls and focus groups, assisted them in crafting a policy paper with analysis and recommendations, and circulated the completed paper to local officials and stakeholder groups. E4E member teachers then used the Policy Team’s paper to inform a grassroots campaign, which utilized social media, earned media, phone banking, and stakeholder meetings that included union representatives and district leadership. Their efforts ultimately helped inform the components of the new evaluation system. At each stage of the campaign, teacher advocates drew on connections and organizing resources provided by E4E, but remained firmly in the driver’s seat throughout.¹³

Teach Plus, another growing, national, teacher-led organization, works to “improve outcomes for urban children by ensuring that a greater proportion of students have access to effective, experienced teachers.”¹⁴ Teach Plus conducts its policy work via three essential programs:

1. **Teaching Policy Fellows:** In each of the six cities where it works, Teach Plus selects 25-30 teachers for an 18-month-long cohort experience. Cohorts meet monthly to engage in policy discussions with education leaders, collaboratively develop and execute advocacy strategies, author policy papers, and complete a course of study on education policy, research, and national best practices. Fellows have testified before the United States Congress and state legislatures on topics including teacher evaluation reform, the Elementary and Secondary Education Act, Common Core State Standards and Assessments, and education funding.
2. **Teach Plus Network:** In-person and virtual forums for teachers and policy leaders offer teachers the opportunity to raise critical policy issues with policymakers and build relationships with policymakers and with one another. The Teach Plus Network consists of over 11,000 teachers across the country and includes Teaching Policy Fellows program alumni. In 2009, the Teach Plus Network pioneered the use of automated response technology to provide policymakers with real-time feedback from teachers.
3. **Turnaround Teacher Teams (T3):** Teachers designed Teach Plus’ T3 program to address inequitable access to effective teachers. The program responds to what these teachers perceived as a failure of many school turnaround initiatives to place teachers with strong track records of success in the highest-need schools. The T3 program recruits, develops, and supports effective, experienced teachers to serve in low-performing schools and share their results and what they learn with policymakers. Teach Plus has found that teachers who get exceptional results in T3 schools have an extra degree of credibility with policymakers.

Teach Plus recently supported teachers in the Los Angeles Teaching Policy Fellows cohort who opposed a bill that would have removed student growth from teacher evaluations. Teach Plus met with teachers to help prepare them to testify before the state legislature—assisting teachers as they crafted their desired message, developed “back pocket” fact kits, and rehearsed testimony to get their message across within the allotted time. Teach Plus also worked with teachers to publish an op-ed and letter of opposition.¹⁵ Teach Plus played convening and supporting roles for teachers, helping them develop deep understanding of the policy issues, and preparing them to be the primary drivers of advocacy efforts.

Approach 4: Amplify the voices of teachers in efforts to influence policy and practice

Teachers involved in pilots understand firsthand the benefits and implementation challenges of blended learning. And blended models are unlikely to improve teaching and learning if they do not work well for classroom teachers. So it is crucial for teachers to play central roles in developing and critiquing models in practice, and in driving discussions and reforms that pave the way for the expansion of successful efforts.

- **Involve teachers in feedback loops about evolving models.** The voices of teachers are particularly important in discussions about what is working in pilot programs and what should be improved or disregarded as programs scale. Teachers may be best-positioned to quickly and effectively spot resources or changes to policy or practice that would enable models to work as intended or improve upon their current iterations.
- **Inform teachers about cutting-edge issues in research, policy, and practice.** While some teachers have a deep interest in driving advocacy for blended models, few have sufficient time to stay apprised of all of the latest developments in research, policy, and practice related to blended learning. External supporters can assist interested teachers by providing up-to-date policy information and resources. With this support, teachers can spend their limited time reviewing information and using it to determine priorities and strategy.
- **Facilitate opportunities for teacher collaboration.** Just as research is time consuming, time for organizing meetings with colleagues for advocacy is not likely to be built into a teacher's typical day. If outside organizations can orchestrate meetings and networking events and provide spaces in which to gather, teachers can concentrate their energies on sharing ideas about ways to improve blended practices, collaborating on policy papers or other documents, and strategizing for collective advocacy efforts.
- **Integrate teacher voice into advocacy strategies.** Any of the strategies set forth in Approach 3, above, would benefit from having teachers at the helm. For example, E4E organizes monthly forums with local leaders where teachers have the opportunity to voice their perspectives on current policy issues, which then inform policy decisions. Teach Plus has helped teachers draft op-eds and serve as lead policy advocates. Both organizations have helped build teachers' knowledge and capacity to take on advocacy roles. Giving teachers the opportunity to engage and advocate for an improved policy climate is a key strategy for increasing the likelihood that policymakers will embrace important reforms.

Conclusion

There is no one best strategy for expanding successful blended learning initiatives. In many respects, the steps we recommend here would work best in concert. Investing in more pilots or programs will require improved systems and infrastructure. True scale will require shifts in policy and the support of teachers, parents, and education leaders. Smart city-based organizations should use some combination of all four approaches discussed in this white paper to develop a comprehensive strategy for expanding successful blended learning initiatives. In doing so, they can then design realistic, practical approaches to confront the challenges of scale and make high-quality blended learning options available to students across their cities.

Endnotes

1. Gillian Locke is a consultant with Public Impact. Joe Ableidinger is a senior consultant with Public Impact. The authors would like to thank Alice Johnson Cain, Vice President for Policy at Teach Plus; Sydney Morris, Co-Founder and Co-CEO of Educators 4 Excellence; Carrie McPherson Douglass, Deputy Director of CEE-Trust (formerly Senior Director, Strategy & Innovation, Rogers Family Foundation); Ethan Gray, Executive Director of CEE-Trust; Bryan Hassel, Co-Director of Public Impact; and Greg Klein, Director, Blended Learning, Rogers Family Foundation, for sharing their expertise and strategic thinking on the issues presented in this white paper.
2. Blended learning is “a formal education program in which a student learns at least in part through online delivery of content and instruction with some element of student control over time, place, path, and/or pace, and at least in part at a supervised brick-and-mortar location away from home.” Staker, H. & Horn, M. B. (2012). *Classifying K-12 Blended Learning*. Mountain View, CA: Innosight Institute. See Staker & Horn (2012) for a detailed taxonomy of blended learning models.
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13. S. Morris, Co-Founder and Co-CEO, Educators 4 Excellence (personal communication, December 11, 2012).
14. Teach Plus, “Our Mission,” <http://www.teachplus.org/page/history-and-mission-62.html>.
15. A. J. Cain, Vice President for Policy, Teach Plus (personal communication, December 4, 2012).



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