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Sustaining a Balanced Calendar in Hopewell City Public Schools

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School of Education, Virginia Commonwealth University

Acknowledgments and Dedications

This team would like to thank our Capstone committee chair Dr. Kimberly Bridges. Thank you for your leadership and coaching. Our weekly Zoom meetings provided us with the guidance we needed to complete our Capstone project.

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Elizabeth Baber

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Brandon Petrosky

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Taylor Snow

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Cleveland Walton

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Chapter 1 - Introduction

A Context for Change

The publication of *A Nation at Risk* in 1983 directed public attention to the assertion that America's students were falling behind their peers in other nations. Unlike the Cold War panic that emerged around student preparation relative to the Soviet Union, *A Nation at Risk* suggested that America was falling behind its democratic peers around the world. Since then, school quality and improvement efforts at the local, state, and federal level have trended toward increased accountability. Many states, including Virginia in 1995, responded to this report with the creation or modification of systems of accountability and accreditation rooted in standardized testing (Duke, 2003).

The advent of the No Child Left Behind Act (NCLB) in 2001 added to this effort through mandating testing in math, reading, science, and writing. This was an expansion of federal involvement in school accountability (Duke, 2003). This expansion included the requirement for disaggregation of testing data by specific student demographic subgroups to include race and socioeconomic status. While these changes brought unprecedented levels of oversight, they also drove important conversations around what academic outcomes schools should expect for their students and how they could ensure those outcomes were attainable for historically marginalized students. In the short term, these conversations served their intended goal of identifying academic achievement gaps. However, two decades after No Child Left Behind they have also helped highlight the importance of hitting lofty academic benchmarks while simultaneously preparing students for life after K-12 schooling. Whether that life is college, the military, or the workforce, schools are increasingly being asked to ensure that students are not only provided instruction that

meets these benchmarks but are also being asked to practice and develop a litany of academic skills that constitute “deeper learning” or “authentic learning.”

For many educators and laymen alike, the process of ensuring that these complementary demands are being met, has shed a harsh light on wide achievement and skill gaps by race, income, and disability status. This has not only impacted traditionally under achieving schools but has led to additional pressures around closing achievement gaps in traditionally high achieving schools as well. The Every Student Succeeds Act (ESSA) of 2015 was the most recent major overhaul to the Elementary and Secondary Education Act (ESEA). While the Act reversed some of the three decade trend toward increased federal involvement in public schools by granting a degree of flexibility to states, it left in place many of the testing and accountability mechanisms imposed by NCLB (Duke, 2003). Although ESSA was crafted to provide flexibility to states, one provision of the ACT that added to schools’ growing accountability load was the addition of a fifth indicator states could choose, all of which nest in some measure under the deeper learning umbrella described above. The menu of options included:

1. Kindergarten readiness
2. Access to and completion of advanced coursework
3. College readiness
4. Discipline
5. Chronic absenteeism.

Across the U.S. this led to a renewed focus on metrics that may have been ignored for years because of their absence from school accreditation formulas. In response to the added ESSA provision and a commitment to building student engagement and ownership in their education, Virginia added chronic absenteeism to its accreditation formula. By doing so, schools with rates of

chronically absent students higher than 10% would need to address the complex underlying student engagement issues that contribute to this issue (Sprick & Sprick, 2018). The Virginia Department of Education (VDOE) understood that the public education of its students required their presence in schools. Many school divisions subsequently identified ensuring that students were offered relevant and enriched learning opportunities through deeper learning as a way to incentivize increased student attendance.

The trend toward increased accountability around quantitative and qualitative educational outcomes has created a myriad of pressures and opportunities for public education. Imperatives from national, state, and local policymakers and stakeholders to deliver results in achievement testing, growth testing, dropout rates, discipline, absenteeism, a host of other metrics and now “deeper learning,” have left school leaders searching for solutions. Schools across the nation have set a higher bar for themselves when it comes to equipping students with academic content knowledge *and* skills that are transferable outside of and beyond K-12 education. These initiatives seek to prepare students for a job market that demands flexibility, creativity, critical thinking and other softer academic skills which have created additional, if not competing, pressures for schools. The demand for a more competitively skilled workforce led policymakers from the national and local level to consider radical shifts in practice to positively impact quantitative metrics and the attainment of the aforementioned “deeper learning” skills. No area of schooling has gone untouched in this regard, including the school calendar.

Rethinking the School Year

The ever-growing demands highlighted above have not only necessitated radical solutions around core pedagogical and instructional leadership practices but to the fundamental organizing

structures of school; including the school calendar itself. The agrarian school calendar has long driven decision-making around issues ranging from summer school remediation and school division-level capital spending, to amusement park staffing concerns and when families may choose to take vacations. However, some of the most ambitious school reforms are initiatives that seek to add time to school days or add days to school years. Such reforms dramatically rework the traditional school calendar with the relatively straightforward goal of increasing student access to instructional time, and include additional supports that come with time spent in school.

According to The Congressional Research Service “In April 1972, the House of Representatives, General Subcommittee on Education of the Committee on Education and Labor held a hearing on the ‘year-round school concept’ and since that time, several pieces of legislation have been introduced to support the use of year-round schools” (Skinner, 2014, p.1). This support fostered interest and growth at the local level, and by 1985, there were 350,000 students enrolled in 410 public schools with some version of a year-round school calendar. By the 2006-2007 school year, that number had grown to 2.1 million students enrolled in 2,936 schools. As of 2011-2012 (the last year for which statistics are available), there were 3,700 public schools and 2.6 million students - 4% of the public school population - enrolled in some version of a year-round school calendar (Skinner, 2014).

Virginia's Year-Round School History

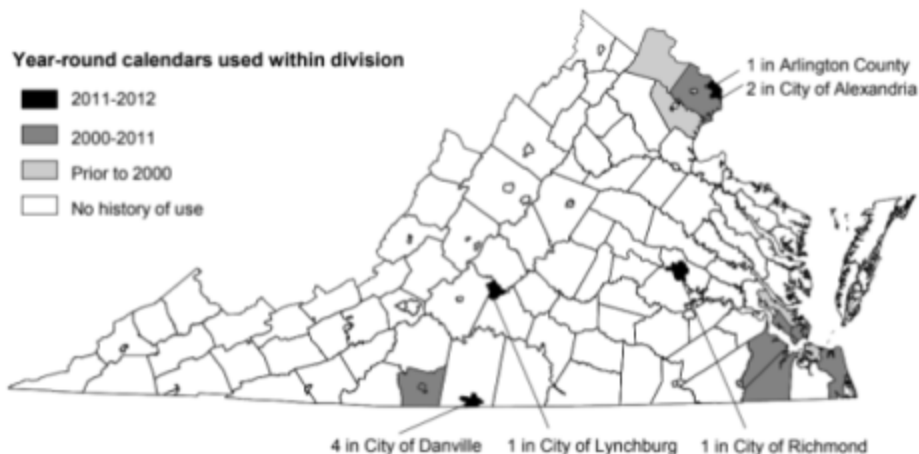
In Virginia, year-round schooling initiatives have existed in some form since the 1970s and increased steadily throughout the 1980s, 1990s, and the early 2000s before a precipitous decrease at the onset of budget cuts related to the 2008 Great Recession (Joint Legislative Audit and Review Commission (JLARC), 2012). Year-round school initiatives may be referred to as “balanced calendars,” due to a different distribution of instructional days throughout the year, or as “extended

school calendars,” due to the addition of days to the typical instructional year. Between 1970 and 2009, 65 schools in 19 school divisions utilized some type of extended or modified school calendar. That figure peaked in 2009 with 31 schools (JLARC, 2012) but as of the 2015 school year, there were only 11 Virginia schools utilizing a balanced or extended school calendar (Williams, 2015) and entering the 2019-2020 school year there were only six (M. Saunders, personal communication, September 28, 2020). This precipitous decline coincides with drastic school budget cuts brought about by the Great Recession. And while economic recovery in the years since has shown a slow rebound to pre-recession levels, statewide balanced calendar implementation has not recovered quite as quickly.

Throughout the history of balanced or extended school calendars in Virginia, there are no instances of entire school divisions adopting the model. Even at the program’s peak in 2009, only individual schools within divisions participated in the program. Figure 1 from the JLARC study shows the prevalence of year-round school calendars across Virginia over time. Generally speaking, this map shows balanced calendar usage in larger, more urban school divisions.

Figure 1

Year Round School Map 2000 - 2012

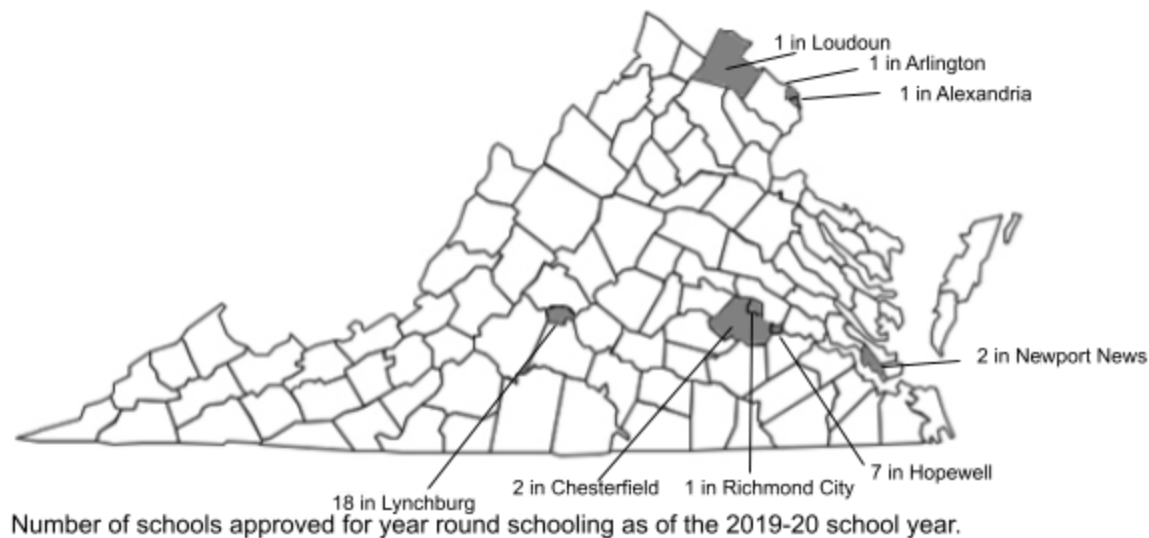


Note. JLARC staff analysis of Virginia Department of Education data and JLARC staff survey of school administrators, 2012.

Virginia's incentive for Hopewell

A renewed commitment to exploring the potential of year round school initiatives emerged during the 2020 Virginia General Assembly session, with the continuation of a grant program that has been in place in Virginia since 2014 to provide \$50,000 planning grants and start-up grants of up to \$400,000 per year to divisions undertaking “Year Round” and “Extended School Year” programs. Both grants are administered by the Virginia Department of Education (VDOE). Figure 2 indicates the number of schools which have been approved for a year-round schooling grant by the Commonwealth of Virginia as of the 2019-20 school year. The map does not take into account schools which have continued with year-schooling beyond the terms of the grant.

Figure 2

Map of Year Round Schools in 2019-20

Note. Map indicating the number of schools approved for year-round schooling grants in the Commonwealth of Virginia as of the 2019-20 school year (VDOE).

Hopewell City Public Schools' (HCPS) exploration of the year-round school concept began in the 2017-2018 school year with their use of the \$50,000 VDOE planning grant. After the work of that planning grant resulted in board approval to implement the balanced calendar, Hopewell City Public Schools (HCPS) submitted a grant application to the VDOE to secure \$500,000 per year for three years for a total of \$1.5 million to implement a balanced calendar year round school model in their school division beginning with the 2020-2021 school year. Initially the division intended to begin its balanced calendar in the summer of 2020 but due to the COVID-19 pandemic delayed first to March of 2021 and later to the summer of 2021. A more detailed narrative of Hopewell's progress from conception to implementation is outlined in detail in chapter 2.

Hopewell's year round initiative

Hopewell is planning a year-round school model known as a single-track balanced calendar, or for Hopewell, the “Balanced Calendar.” Single-track balanced calendars redistribute the vacation days or provide opportunities for extra instruction during the newly formed breaks called “intersessions.” During intersessions, students have the option to attend additional school-based enrichment or remediation opportunities directed by school staff, community partners, or combinations of the two. Aside from the opportunity to increase instructional time, single-track balanced calendars also specifically seek to address what researchers, educators, and laymen alike refer to as the “summer slide.” This alliterative turn of phrase constitutes the knowledge and skills that students lose over the course of their summer vacations (Cooper et al., 2003). Research indicates that this slide is not only quite real but is likely a prime culprit for achievement gaps that schools work tirelessly to address. A meta-analysis conducted by Cooper et al., (1996) provided the conservative estimate that cross all demographics and grade levels:

When the overall effect of summer vacation on standardized test scores is at issue, students appear at best to demonstrate no academic growth over summer. At worst, students appear to lose 1 month of grade-level equivalent skills relative to national norms. When performance change is gauged relative to the student's own fall scores, the worst-case scenario seems to be that the average student score in the fall is about one tenth of a standard deviation below the spring average across all demographics and grades (p. 259).

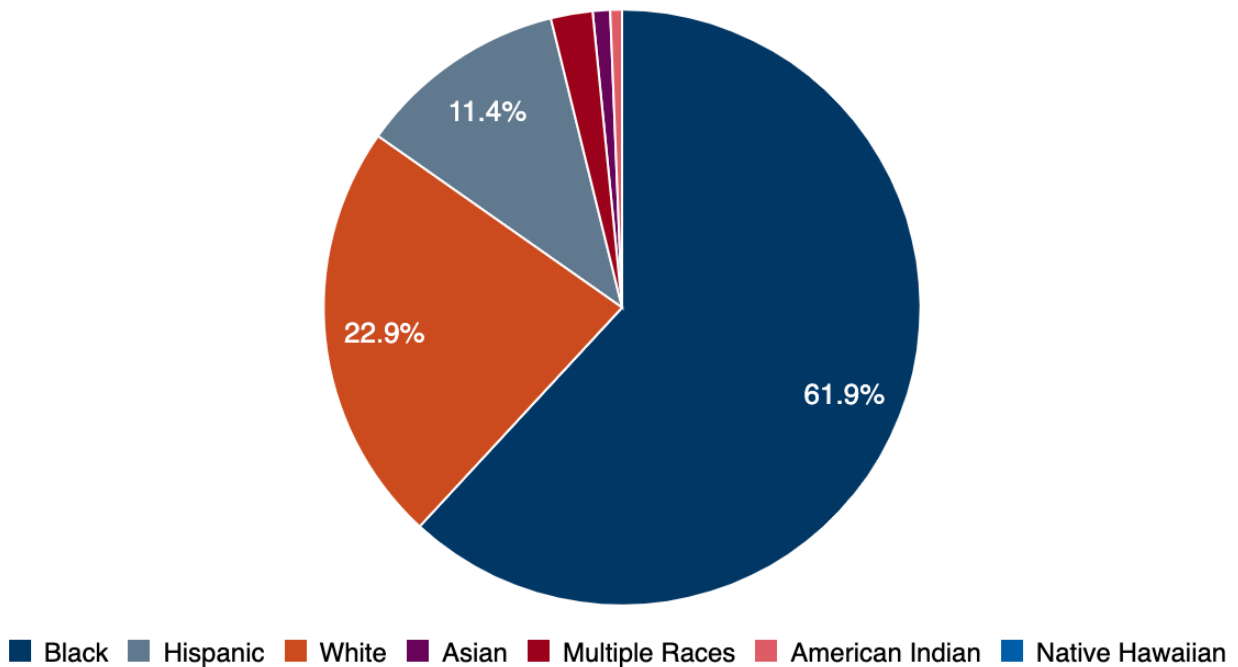
With reference to this academic loss, researchers have noted that students from lower socioeconomic backgrounds, African American, and Hispanic students make progress that is similar to that of their peers during the school year but fall farther behind during summer breaks, devoid of the educational enrichment opportunities over vacation afforded their often more

advantaged peers (Alexander et al., 2007; Cooper et al., 1996; Edmonds, 2008; Fitzpatrick, 2018; Zuckerbrod, 2007). While recent research has suggested that the precipitousness of these losses is not as extreme as once thought (Workman & Merry, 2019), there are still clear gaps in opportunity for summer learning that impact elements of education across the school year. These facts above many others have driven schools with significant populations of these groups - including our client Hopewell City Public Schools (HCPS) - to implement reforms to the traditional school calendar.

For the 2020-2021 school year, Hopewell City Schools reported racial and ethnic demographics that the JLARC study (2012) suggests makes the division one that could benefit from implementing some model of year-round school.

Chart 1

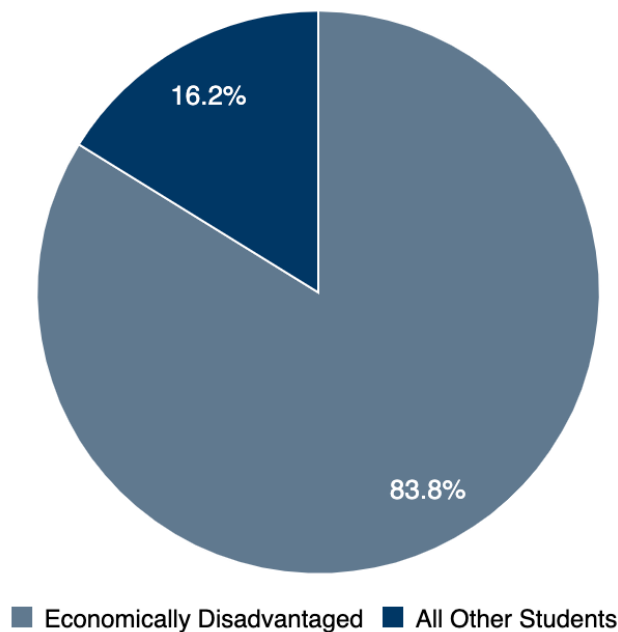
Hopewell City Public Schools Racial and Ethnic Group Enrollment Data



Note: Data and chart from VDOE School Quality Profile for Hopewell Public Schools

In addition to the school division's racial and ethnic makeup, the division reports socioeconomic demographics that also suggests that a year-round calendar could have favorable impacts on student achievement and engagement.

Chart 2



Note: Data and chart from VDOE School Quality Profile for Hopewell Public Schools

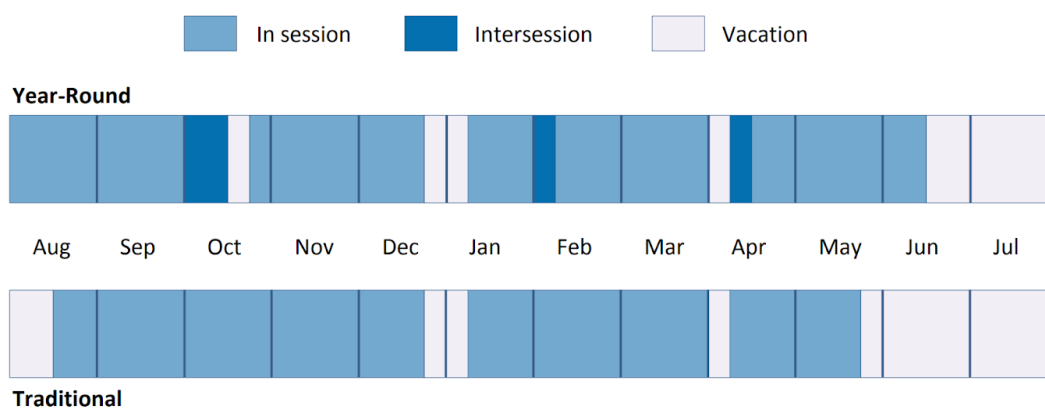
In addition to these demographic factors, for the 2018-2019 data year (the most recent for which data is available) Hopewell City Schools' reading test performance across all grade levels lags behind the state average by 12 points; 66% to 78%. A similar gap of 13 points exists in science with a 68% achievement rate in science compared to 81% across Virginia. In mathematics, Hopewell's performance is better but still trails the statewide rate by six percentage points, 76% to 82%.

The specific balanced calendar format that HCPS has proposed is also the most common across the U.S. (National Education Association, 2016). After discussing a variety of potential

models, the school division decided to establish a single-track 45-15 day balanced calendar model. In this format, every nine weeks of school (45 days) is followed by a 15-day intersession composed of ten enrichment or remediation days and a five day school break. Thus, the school calendar is structured with four 9-week instructional sessions with intersessions in between (Figure 3). This structure includes a summer break that is truncated with a June intersession and an early August school start date.

Figure 3

Comparison of year-round and traditional school calendar structures



Note: Year-round calendar structures vary by division and include different in session, intersession, and vacation dates.

Source: 2012-2013 school calendars in Danville Public Schools.

The additional school-time that comes with intersessions in single-track balanced calendar initiatives also comes with additional costs in terms of staffing, transportation, capital expenditures (e. g. outfitting schools with air conditioning), and spending associated with serving students during intersessions and other extended school hours. A 2012 study of balanced calendar initiatives in Virginia by the Virginia General Assembly’s Joint Legislative Audit Review Committee (JLARC, 2012) found that the average cost of intersessions in the balanced calendar was 3% of a division's budget. In Hopewell, these costs will be covered across multiple school years, subsidized by the

\$1.5 million YRS grant award and \$300,000 local matching funds. Beyond the duration of grant funding, HCPS will need to identify funding streams or savings to continue the effort.

Request for Assistance

In spring 2020, HCPS submitted a Request for Assistance (RFA) to the VCU Department of Education Leadership for an EdD Capstone study of their proposed balanced calendar initiative. Our Capstone team, composed of four Virginia Commonwealth University (VCU) EdD students, was matched with HCPS based on our interest in the proposed project. In June 2020, our Capstone team met with the HCPS designated program administrator (referred interchangeably in the review as the client) who outlined the request for assistance. In July 2020, our Capstone team developed a response to the client's proposal outlining the Capstone purpose, research questions, methods of study and data analysis, and timeline (see Appendix A).

The Capstone team's modified focus

The client's initial request was for our Capstone team to study the process, effects, and outcomes of their single-track 45-15 day balanced calendar and subsequently provide a conclusive report on findings as well as recommendations for continued and future success. The RFA was submitted on January 21, 2020 (see Appendix B). Six-weeks later the COVID-19 pandemic hit, radically altering planning and expectations for the HCPS balanced calendar as well as Hopewell's current and future instructional delivery plans. As a result, the client initially elected to shift implementation of their first intersession from August 2020 to March 2021 before ultimately delaying implementation of the balanced calendar until August 2021. This delay also necessitated an adjustment in our team's initial analyses of the organizational context and problem of practice.

Hopewell's shifting context

Since March 2020, school systems across the nation have shifted from face-to-face instruction to virtual and hybrid models, testing the norms of best practices in the traditional education system. Students are receiving direct synchronous instruction, asynchronous instruction, and one-on-one support virtually; both limiting and expanding opportunities.

Hopewell City Public Schools utilized a full virtual learning option for the first half of the 2020-2021 school year, before implementing a hybrid approach that merges face to face and virtual instruction from March through the end of the current school year 2020-2021. Currently, their plans are to begin their balanced calendar initiative in the summer of 2021 with full face-to-face intersession instruction that complies with CDC guidelines for distancing and other recommendations such as mask wearing.

It is important to note that even as schools emerge from the darkest months of the COVID-19 pandemic with plans for a return to full face-to-face instruction, fatigue and existential worry from the pandemic for faculty, families, and the community at-large will linger for months if not years as communities collectively grasp at normalcy. In the Hopewell community, this desire manifested in our survey results (outlined in chapter 4) for some respondents as opposition for the balanced calendar implementation in summer 2021 so that Hopewell students and parents can have “a normal year”; phrasing which emerged repeatedly in survey responses. For teachers and administrators, over a year's worth of demands on faculty to reinvent instruction for shifting contexts have left some teachers feeling beleaguered and possessing less energy for tasks like curriculum development. Nevertheless, Hopewell's administration indicated as late as April of 2021

that the willingness of teachers to provide intersession instruction remained strong and had not been adversely impacted.

It is also important to note that the COVID-19 struggles on external stakeholders may impact Hopewell's balanced calendar initiative going forward. Families have struggled under the pressures of monitoring and supporting their students' learning in an environment where the walls between school and home have ceased to exist. While at the same time experiencing a shift in schedule that impacted the ability of some to work and financially provide for their families. As more and more businesses return to normal working hours and begin to recover from the financial impacts of COVID-19, it is unknown if once-reliable community partners will be able to sustain a pre-pandemic level of commitment to Hopewell's plan. After months of disruption to regular operations, a focus on re-establishing a financial base and achieving sustainability may be driving factors in a business partner's ability to support HCPS in its balanced calendar design, which includes intersession partnerships with the community.

Document Review, Client Interviews and Problem Analysis

During the initial conversation with the Capstone client, our team requested access to any documentation related to the HCPS' balanced calendar initiative planning and organization. The HCPS balanced calendar coordinator sought and received permission from the school division's superintendent to share access to relevant internal and external documentation related to the balanced calendar initiative with our team. The documents were organized in four major category folders in an active Google suite. The folders were titled "Final," "Works in Progress," "Presentations," and "Research." Each of the folders had varying subfolders containing additional documents. The Final folder had five subfolders containing a total of 53 documents. The Works in Progress folder had 13 subfolders containing a total of 86 documents. The Presentations folder had

four subfolders containing a total of 31 documents. The Research folder had 13 subfolders containing a total of 140 documents (see Appendix C). We also searched the HCPS BoardDocs repository for school board materials and found eight School Board documents containing content that was relevant to the balanced calendar initiative. The team inventoried and reviewed all documents, adding summaries and commentary on how each document supported Hopewell's planning process, and determined the value of documents for our study moving forward. The team recorded our work in a shared Google spreadsheet.

Through analysis of the documentation from Hopewell City Public Schools (HCPS), we first found numerous finalized documents including the division's grant applications and Request for Assistance from VCU for our study. A folder labeled, "Work in Progress" contained numerous documents for internal and external stakeholders related to intersessions which proved valuable throughout our investigative process. Contained within a folder labeled "Presentations" were several slide decks which provided an overview of how the balanced calendar initiative had been presented to several stakeholder groups during the planning stages. These documents present a clear picture of how the division chose to communicate initiatives to varying groups of stakeholders as they were in the midst of securing support. As such, analysis of this archive could prove a critical resource for other school divisions desiring to implement a balanced calendar who are in the process of communicating their plans to groups whose support will be critical. Although not all of the files contained among these internal working documents were relevant to our study on sustainability of the balanced calendar initiative for Hopewell City Public Schools, we identified two common themes during our initial document analysis: communication and intersession planning.

Multiple conversations with the HCPS balanced calendar project coordinator, Byron Davis provided our Capstone team with additional context and a general overview of the balanced calendar initiative. The project coordinator walked our Capstone team through an extensive synopsis of the development of the balanced calendar initiative in HCPS and the hopes of the school division for the program. In later conversations, Davis took time to answer targeted questions to assist the team in formulating recommendations. These conversations provided detailed information about the nuts and bolts processes that had been developed for organizational management issues like staffing and intersession scheduling. Furthermore, the conversations allowed us to gather technical information about the initiative that either could not be confirmed or gleaned at all from the extensive document review. As with data gathered from focus groups and survey, discussed in great detail in chapter four, responses from these client meetings have aided our team in making recommendations for sustainability. Our recommendations to the client are inclusive of all stakeholder groups and also reflect a full picture of the work the division has already completed or has in progress.

The team also applied two common root cause analysis protocols to its evolving understanding of the problem of practice from its analysis of documents and two client interviews. The first was the “Five Whys” approach; a method developed for problem analysis in a business context by the Toyota Motor Corporation (Ohno, 2006). The second was a “Problem-Research-Solution” mapping exercise to help determine the problem of focus for the team’s research efforts. These analyses enriched our understanding of the challenges facing HCPS’ balanced calendar initiative. Takeaways from this work helped inform the development of a purpose statement and associated research questions for the Capstone.

HCPS' Path to a Balanced Calendar

The 2019 HCPS application for the VDOE planning grant outlined the goals and the rationale for the school division's decision to launch a balanced calendar design and implementation process (see Appendix D). The goals are as follows:

1. Decrease the failure rate on Virginia Standards of Learning tests in all tested content areas by 10% each year of the program
2. Decrease the rate of chronic absenteeism (defined by the Virginia Department of Education as the percentage of students who are absent more than 10% of school days) by 10% in each year of the program
3. Increase division level VDOE School Climate Survey averages by 10% in academic engagement, emotional engagement, and behavioral engagement. (Hopewell Public Schools, 2019a)

Determining a Model

In 2017, extensive investigation into year-round and other extended school time approaches was conducted by a VDOE planning grant-funded group of HCPS teachers and administrators (Mattingly, 2019). This research group was directed by Byron Davis, who at that time served the division as an elementary school principal. Davis became the first dedicated staff member for the initiative as the Balanced Calendar Coordinator. The research group had a variety of goals but the overarching charge was to determine whether an approach to extended schooling could help HCPS achieve the goals listed in the planning grant application, and if so, how the initiative could be designed to pursue those goals efficiently and effectively.

The group considered the potential impact of a variety of models ranging from extending the school day to significantly redesigning summer school programming. This process included extensive surveying of students, teachers, and school administrators along with focus groups to assess the perspective of these constituent groups regarding the implementation of a balanced calendar. The research group shared its findings in a presentation to the HCPS school board on May 31, 2018 (Hopewell Public Schools, 2018b) concluding that a balanced calendar had the potential to be particularly effective for achieving the goals mapped out by HCPS in their grant application. The presentation leaned heavily on the JLARC report (2012), which indicated that the balanced calendar as implemented in other Virginia school divisions can be particularly effective in improving academic outcomes in reading and math for African American, Hispanic, Limited English Proficiency (LEP) students, and students from lower socioeconomic backgrounds. The group also shared early survey results suggesting that the model was the best approach among those they investigated to ensure administrator and faculty buy-in, subsequently minimizing teacher turnover as a result of the change.

This proposal clearly resonated with the board as a month later, at a joint meeting of the Hopewell City Council and school board (Hopewell City School Board, 2018), the group was authorized to continue their work. As a result, HCPS began more targeted research and planning into the feasibility of implementing Virginia's first division-wide balanced calendar initiative. As part of this early planning, many other design decisions had to be considered. In a late 2017 presentation, before a final decision to pursue a balanced calendar had even been reached, the HCPS research group had begun to consider the best calendar structure fit for the school division if they decided that they wanted to pursue such an initiative. Their research focused upon identifying schools and districts that had implemented balanced calendar initiatives in some capacity and then

identifying examples from within that group that had a similar demographic profile to that of Hopewell City Public Schools. Early in the research it became clear that Hopewell would be unique should it choose to pursue the balanced calendar approach, as there were scant examples of districts that implemented the single track calendar across all schools within a district.

The individual schools whose demographic profiles indicated similarities to HCPS were labeled “best fits.” The demographic categories used to target these best fit schools included socio-economic and racial make-up, whether or not the districts and schools were meeting their state’s accreditation standards, the length of time the balanced calendar had been sustained, and the enrollment of the schools and districts. Using these criteria, the group identified four exemplar schools whose experiences with year-round calendars could inform their own recommendations for balanced calendar design. Two of these were elementary schools in the Hayward Unified School District in California, one an elementary school from Clarke County, Nevada, and a school from Portland, Oregon Public Schools. Of these, three of the four used a 45-15 balanced calendar model, in which ten days of intersession and five days of break follow every 45 days of instruction. This research, along with independent discussions as to the implementation issues unique to Hopewell, led to the pursuit of the 45-15 calendar model.

Teacher Considerations

Another series of design challenges during the planning stage emerged around how to incentivize and compensate HCPS staff for developing and delivering engaging intersessions. This process meant creating a system that served the multiple purposes of ensuring that 1) intersessions were developed and staffed at a level that would meet student demand; 2) teachers saw the option to

plan, deliver, and get compensated for intersessions as an appealing one; and 3) teacher compensation incentivized participation with an eye toward long-term financial sustainability.

To provide a foundation for intersession staffing, the division opted to re-allocate five of 10 existing professional development days within teacher contracts for all teachers to create and staff at least one intersession during the course of the school year. However, in school board minutes from the May 16, 2019 meeting where final approval of the balanced calendar was granted (Hopewell City School Board, 2019b), the division superintendent, Dr. Melanie Hackney, acknowledged intersession staffing challenges. She noted that staffing concerns could persist in spite of the intersessions being written into the teacher contracts. She noted that if only one out of three of the division's students opted to attend intersessions during each of the fall, summer, and spring periods, the division would need 392 additional paid weeks of intersession in addition to the 366 built into teacher contracts. While teacher survey results cited by Dr. Hackney indicated sufficient teacher interest in staffing those additional intersession weeks, student interest beyond the one-third mark could present staffing challenges for the division that would need to be addressed through additional compensation, the hiring of temporary or part-time staff, or restricting access to intersessions. (Hopewell City School Board, 2019b)

HCPS leaders also made the decision to encourage teachers to make intersession proposals for district consideration. These intersession proposals would be rooted in their own personal, academic, and extracurricular interests. In short, teachers were given a broad mandate to use intersessions to share their passions with students. According to the Balanced Calendar Coordinator, Byron Davis, this decision had multiple purposes: first, it sought to incentivize teachers to participate beyond the one contracted intersession. Additionally, it would help ensure that the shift to the balanced calendar and the requirement that teachers offer at least one intersession did not

result in teacher attrition. For HCPS, logic dictated that offering teachers creative control of their intersessions and the ability to design instruction around a topic about which they were passionate would make the shift to a balanced calendar a more appealing one for faculty. This emphasis has thus far proved to be an effective one. In fact, an internal survey of all HCPS teachers conducted after “intersession as teacher passion” messaging indicated that only nine of 457 respondents did not plan to return to HCPS for the following school year due specifically to implementation of the balanced calendar (Hopewell Public Schools, 2018c). Finally, the division also created this teacher-design approach to intersessions as a driver for their goals around ensuring student engagement through deeper learning. Davis confirmed that for HCPS the logic is that teacher passions for their respective intersession topics will be channeled into the development of curriculum and instruction that will drive deeper learning and engagement for the students participating.

Leaders and Community

Once the design and broad implementation logistics had been established during the early stages of work funded by the VDOE planning grant, HCPS began the work to secure VDOE, school board, and general public support for the implementation of their 45-15 balanced calendar model. In addition to communicating their research findings to the school board at regular intervals and providing frequent progress updates, the division took their message into the community hosting individual ward meetings throughout September of 2018 to address questions and concerns from residents in an intimate, local setting (Hopewell Public Schools, 2018a). Davis explained that while these ward meetings were not heavily attended they gave families and community members who did opt to attend a means to give input as to the division’s plans. They also allowed families with

experience with year-round schooling in other divisions to share their insights; a benefit that school officials had not planned for but which proved beneficial.

Momentum for the balanced calendar increased as a result of a March 2019 special meeting of the HCPS school board. This meeting included a site visit to neighboring Chesterfield County's Bellwood Elementary School during Bellwood's first year of extended school year implementation, followed by a special school board Q&A with Virginia Superintendent of Public Instruction, Dr. James Lane (Hopewell City School Board, 2019, 'Minutes for Special Called Meeting'). The site visit provided these essential stakeholders an opportunity to see intersessions in action and talk with teachers and students involved in implementing the initiative. The Q&A session allowed for a conversation between members of the board and Lane, who had been the Chesterfield County Schools Superintendent when the decision was made to pursue an extended school year for Bellwood Elementary. As state superintendent, Lane's encouragement and support of Hopewell's implementation would also be helpful to gaining community support. In addition, the question and answer session focused upon Dr. Lane's experience teaching in a Durham, NC public school. Dr. Lane ascribed the high teacher morale and community support, at least in part, to the use of a balanced calendar. The discussion was also mobilized by his experiences with balanced calendars and year-round schooling in Chesterfield County, and his recommendations to the board as they considered pursuing their own balanced calendar. In this conversation, Lane noted specifically that Hopewell should move forward with implementation if they felt that 60-80% of the community supported the initiative; this statement was cited specifically by then chair of the HCPS school board Mr. Chris Reber as a key consideration for board approval of a plan to pursue an implementation grant from the VDOE.

The work of the research team and central office leadership to develop a workable proposal for the balanced calendar and secure teacher buy-in and community support culminated on May 16, 2019 as the HCPS board voted 4 to 1 to implement the calendar for the 2020-2021 school year (Hopewell City School Board, 2019, 'Balanced Calendar Approval'). At that meeting, HCPS superintendent Dr. Melody Hackney summed up the focus of the previous years of work and set the tone for the next year's planning, by inquiring of those in attendance "How can we not be willing to try this? Who are we going to hurt by doing this?" before plainly stating, "We will not let this fail" (Atkinson, 2019). With the encouragement of state leadership, regional attention, and local support, the HCPS balanced calendar plans had clear momentum.

A summary of the HCPS balanced calendar implementation journey

The steps outlined above clearly reflect a tremendous amount of work by HCPS to first build and then implement a balanced calendar proposal that would achieve broad teacher, community, and stakeholder support. Designing their initiative with an eye toward community "fit" engendered support from a diverse group ranging from school board members, administrators, and teachers to state-level policymakers. This support was consistent in the planning group's survey results that ultimately indicated 97% of faculty and 80% of administrators were in favor of implementing the balanced calendar.

The three desired outcomes of balanced calendar planning became the metrics by which the school division planned to measure its success in implementation: a decrease in SOL failure rate across all tested content areas by 10%, a 10% decrease in the system's chronic absenteeism rate, and a 10% improvement in areas of academic engagement, emotional engagement, and behavioral engagement as reported by a climate and culture survey. These quantitative outcomes are clear benchmarks that the client feels can be achieved with the implementation of a successful balanced

calendar initiative. It should also be noted that though they are not framed as such in the grant application, they are benchmarks that are foundational to the sustainability of a wide range of education reform initiatives. In other words, long term viability will depend upon fulfilling these goals and communicating progress with those who expect the balanced calendar approach to help the division achieve them.

The HCPS Deeper Learning Framework (see Appendix E) also plays a critical role in the division's decision-making and planning. It is noted as the foundational document for ascertaining success or failure in achieving desired intersession outcomes in an internal planning document from May 4, 2020 (Hopewell Public Schools, 2020c). The framework will be used to evaluate intersession instruction through the development of rubrics for scoring student learning products generated during the intersessions. Further, the framework will inform the development of pre and post-tests required for monitoring progress by the VDOE grant program. As such, the tools will evaluate the extent to which students are engaged with deeper learning experiences such as "communicating with audiences within and beyond the classroom," "explaining how what they are learning is part of a larger cross-curricular goal" and "engaging in open-ended learning experiences that require higher order thinking skills on authentic tasks" among others. The data gathered from these tools will be indicative of the successes and failures of the intersessions as it pertains to deeper learning. It is clear that the division believes in the balanced calendar initiative's potential to serve deeper learning framework goals as well as progress toward the quantitative benchmarks in the grant application.

This connection between the grant goals and the division's deeper learning goal was vital in determining the team's areas of Capstone research focus. While deeper learning may be a commonly understood concept within education, it may not resonate as commonly with the general

public. If the division plans to promote the progress it makes in providing deeper learning opportunities for students as a result of balanced calendar implementation, it is vital that the division communicates to the public what deeper learning is and why it's important. Only with purposeful communication will progress toward the division's deeper learning goals help shape public support for the balanced calendar. It is imperative that HCPS consider that the language involved in communicating success as measured by traditional student achievement metrics is not necessarily the same as that used for success around deeper learning goals. Clear communication will enable public-facing understanding that can help support sustainability beyond the period funded by the VDOE grant.

The Challenge: Moving From Buy-In to Sustainable Success

Beyond successful implementation of the calendar, it was clearly important to HCPS to create a sustained balanced calendar initiative, and one that could even serve as a model for other school divisions considering similar reforms. The quest for success and sustainability means the initiative will have to meet the expectations of a broad group of internal and external stakeholders and convince them that it will be worth their investment when the state grant money--which is currently making the initiative an inexpensive local investment--runs out. This may be particularly challenging if the quantitative benefits don't appear immediately (which is likely) and if these stakeholders don't recognize the impact of deeper learning.

HCPS does indeed fit the demographic profile of a division that can benefit academically from implementing a balanced calendar (JLARC, 2012), nevertheless, there are some caveats. While a commitment to deeper learning and authentic academic experiences is laudable, there is a question as to how to market the benefits for deeper learning provided by the balanced calendar initiative to community stakeholders who may not understand exactly what "deeper learning" is,

why they should care about it, or why it's worth their tax dollars. The JLARC study indicated that even the schools where the balanced calendar was successful in improving student achievement eventually ran up against the cruel reality of budget crunches and other issues that led them to abandon their initiatives. We determined that addressing potential threats to sustainability could help our client shift from building support for the concept to building support through community appreciation of long-term value.

Purpose Statement and Research Questions

The purpose of our study is to assist Hopewell City Public Schools in sustaining community support for the balanced calendar initiative by providing research-grounded guidance for:

- successfully delivering relevant and meaningful intersessions that foster student academic success;
- aligning with community goals; and
- communicating progress and successes with stakeholders.

Three research questions guide this study:

1. What are characteristics of successful and sustained balanced calendar initiatives?
2. How can the Hopewell community most benefit from the balanced calendar initiative?
3. How can HCPS communicate their progress in ways that increase support for the balanced calendar initiative?

Chapter 2 - Literature Review

We found no available research that indicates how long balanced calendar initiatives are typically sustained nor on the traits that separate sustained initiatives from those that end. Given our goal of making recommendations for how to ensure a sustained balanced calendar initiative and the paucity of existing research aligned to that specific topic, our team examined two distinct areas of research that inform long term sustainability of educational reforms such as the single-track balanced calendar. Those research areas are:

1. Characteristics of successful single-track balanced calendar initiatives
2. Enabling sustainable school reforms through marketing and engagement of internal and external stakeholders

This literature review provides an assessment of those research areas.

Literature Review Process

The initial scan of literature included searches for peer-reviewed research across a variety of databases; Ebsco host, ERIC, and Google Scholar for “year-round school,” “year-round calendar,” and “balanced calendar.” The articles reviewed in these searches built our foundational knowledge of the history of balanced calendar initiatives and their two main formats - single-track and multi-track models. We chose not to pursue additional research around multi-track models due to their emphasis on utilizing building space to accommodate the high enrollment aspect rather than increasing instructional time (Appleton et al., 2008). In short, the multi-track model was created primarily to target issues with overcrowding, and while that may be more relevant with the advent of the COVID-19 pandemic, the central arguments for multi-track balanced calendar models do not address the issues HCPS wants to undertake through their balanced calendar initiative. We then

narrowed our search parameters to hone in on particular characteristics of single-track balanced calendar initiatives. Of specific interest to our work were the three measures of success as defined by our client; academic achievement, student engagement, and teacher engagement. The impact of balanced calendar initiatives on these metrics was explored where it was available but given the relatively few studies available and the variation in findings among those that did exist, it was necessary to examine literature outside of that research area as well. For example, because there was not a great deal of information on marketing balanced calendar initiatives to a community, it became necessary to examine education marketing generally and identify areas where the research could be extrapolated to apply to our problem statement. Using this refinement, we searched specifically for the impact of adding instructional time via any alteration of the school day, best practices for student engagement as a means to improve attendance, and general best practices for teacher retention. This second layer of searches outside of the balanced calendar and year-round school canon yielded results that we assessed for their applicability to a single-track balanced calendar initiative. Those that were not applicable were not included in the literature review.

Characteristics of successful single-track balanced calendar initiatives

That implementation of a balanced calendar fundamentally alters an institution as historically ingrained as the school calendar dictates that the characteristics driving its success in securing desired outcomes are predictably complex. Below we address what the current research canon says about how each of a number of factors informs the success of year-round school initiatives.

Student Academic Growth

While some meta-analyses do attempt to ascertain the impact of balanced calendar more broadly, the existing research more frequently assesses only the impact on student academic growth; the one metric most readily examined through quantitative research. Single-track balanced calendar initiatives seek to foster significant academic growth by providing a more continuous learning cycle and additional instructional time. While intersessions vary in structure and in the pedagogy they leverage to drive outcomes, they typically seek to engage students in meaningful learning opportunities for enrichment, remediation, and other means of targeted instruction as a means to enhance student academic growth (JLARC, 2012).

Each of these studies found that this effect is strongest for disadvantaged minority groups and students from low socioeconomic backgrounds (JLARC, 2012). In their meta-analysis Cooper et al. (2003) found that the benefits of a balanced calendar were observed most in school districts whose composition was historically disadvantaged students who “face greater risks in more impoverished communities during nonschool hours (Carnegie Corporation, 1994) and greater summer learning loss (Cooper et al., 1996) compared to their more advantaged counterparts” (Patall et al., 2010, p. 408). The same direct relationship between balanced calendar initiatives and improvements in mathematics was seen in a separate analysis of school districts in Wisconsin with “a higher percentage of minority students, and districts with greater financial resources” (Patall et al., 2010, p. 418).

Impact and Investment in Year Round Schools

Research indicates that the extent to which student academic growth occurs in any educational setting is more a function of the quality of the instruction than the amount of time spent

simply occupying the setting (Karweit, 1984). Simply put, additional instructional time will not facilitate student academic growth if the instruction itself isn't effective. In a longitudinal study of California elementary, middle, and high schools that implemented various balanced calendar models, Stenvall and Stenvall (2001) found that single-track models improved student achievement as measured by Academic Performance Index (API) testing results. Similar results were identified in a meta-analysis focused on lower elementary school students in single-track balanced calendar schools (Palmer & Bemis, 1999). However, for each study that suggests that balanced calendar initiatives have a significant positive impact on student achievement, others suggest no significant impact (Ferguson, 1999; Glines & Mussatti, 2002; Mahoney, 2007). Notwithstanding this conclusion, one of the researchers suggest the impact may be limited to specific contexts and grade levels (Palmer & Bemis, 1999).

While there is evidence indicating the potential of balanced calendar initiatives to create positive student outcomes, research also indicates that “opposition to extending school comes from middle-class and affluent parents who value the summer vacation for their children and question the value of additional school time” (Silva, 2007). It may be obvious, but it's worth noting that research on the “summer slide” indicates that middle-class and affluent students are not as susceptible to the same kind of learning loss that seems endemic to low income and minority students (Alexander et al., 2007; Cooper et al., 1996; Edmonds, 2008; Fitzpatrick, 2018; Zuckerbrod, 2007). Middle-class and affluent parents may be opposed to balanced calendar initiatives that cost them more in property taxes, alter the school calendar to which they have been accustomed, and may not assist their child in any statistically significant way. Simply put, for these demographic groups, a balanced calendar plan may not pass the, “does this make my life better” litmus test. In a time when the perceived purpose of schools can vary from community interest to

self-interest, balanced calendars that serve to level the academic playing field for historically marginalized subgroups may lead to more affluent communities opposing such initiatives. Even though HCPS built their implementation message around the fact that a balanced calendar is good for all HCPS students, they may anticipate some level of long-term pushback from affluent and middle-class families who feel their schedules are being interrupted for an initiative that may not benefit them directly. Several industries which benefit from extended summer breaks also expressed opposition as they look for students to become a part of the larger workforce during those months (Patall, 2010). Clearly then, it is important to consider that while schools are generally in the business of pursuing positive educational, civic, and socioemotional outcomes, there may be contingencies within communities that value cultural and economic aspects of the traditional summer vacation just as much. Changing these hearts and minds will be crucial for programmatic sustainability.

Quality of instruction matters

In 2012, the Commonwealth of Virginia's Joint Legislative Audit Review Committee (JLARC, 2012) completed a study of balanced calendar schools in Virginia. The study concluded that intersessions can have a significant positive impact on student achievement as measured by the Commonwealth's Standards of Learning (SOL) tests. In particular the impact is noted for historically disadvantaged groups like African Americans, Hispanics, and students from low socioeconomic backgrounds. The report noted that intersession attendance alone may not drive success in regards to academic achievement. Also, high quality instruction must occur year round, including intersessions, to see measurable benefits. The study further noted that:

While intersession attendance potentially increases the amount of academic instruction for

students in year-round schools, it appears to be how intersession instructional time is used—not the mere existence of the additional instructional time itself— which has academic benefits (p. 23).

Although findings are mixed as to whether year-round schooling and balanced calendar initiatives have been effective in improving student achievement and academic growth, research on learning time indicates quality instruction is effective. Two studies that focused upon the effect of time on task in a variety of school settings independently conclude that the quantity of additional instructional time (whether it be via extended school years, extended school days, or intersessions) alone is not enough to drive gains in student achievement (Denham & Lieberman, 1980; Karweit & Slavin, 1981). This research points to positive associations between instructional time and learning generally but found wide variance in the extent of that effect. Karweit (1984) notes that, “differences in achievement are not consistently explained by differences in the amount of instructional time. In many instances the proportion of variance in achievement uniquely attributable to time varies from 1 to 15 percent” (p. 34). Such wide variance is indicative of how much quality of instruction matters. In short, the quality of extended learning time--not the quantity--is the most important driver of student achievement gains. This conclusion is of paramount importance for schools and divisions considering balanced calendar implementation as it elevates the conversation around not just whether intersessions should happen but *how* they should happen.

Quality of intersessions matter

In their case study, Adelman et al. (1996) drew similar conclusions as to instructional time as those studies referenced in the previous section. Their study was designed around a study of 15

schools; each of which had implemented some kind of extended learning time model, including intersessions embedded in a balanced calendar initiative. The study found that some programs flourished and others floundered:

Anyone tempted by this route should pay careful attention to the New Orleans Experiment ... in two schools. This experiment might have worked if the district had invested in a planning and development stage prior to full implementation and if there had been clear and mutually understood goals for how the time should be used. These two conditions were met at Timilty Middle School in Boston when it added daily school time that adds up to the equivalent of 36 more days per year. Outcomes for the Boston children improved dramatically; outcomes for the New Orleans children remained poor. The Boston experiment is thriving; the New Orleans experiment is dead (p. 47).

This variance in the quality of instructional time during intersessions may account for the wide range of conclusions as to the overall effectiveness of balanced calendar initiatives. Cooper et al. (2003) also found that effect sizes for improvement in academic achievement were more pronounced and significant when they limited their analysis to the 15 studies of balanced calendar initiatives that explicitly indicated the presence of intersessions. Cooper et al. (2003) speculate that purposeful design of curriculum and the organization of instructional time in intersession planning may contribute to this significance. JLARC (2012) echoed this sentiment via its discussion of effective intersession design, bolstering the legitimacy of intersession quality as a key focus. Finally, Patall et al. (2010) conclude similarly that, “it would seem that alongside other well-designed initiatives to support student learning and development, extending school time may be a powerful tool” (p. 431). While limited, research indicates that if additional instructional time during intersessions is of high quality, then balanced calendar initiatives can add value beyond

traditional calendars (Adelman, 1996; JLARC, 2012; Mitchell-Hoefer, 2010; Palmer & Bemis, 1999).

Importance of long-term resources

The quality of intersession programs has been directly linked to the success of balanced calendars, however intersessions are not easily managed aspects of a school system. Divisions must also address related challenges to planning this time. Financially, intersessions are not always fully funded and require community outreach and support for full implementation. Gandara and Fish (1994) also note that “while the intersession programs were targeted for at-risk children, many of these children did not return to school for the program” (p.82). Gandara and Fish (1994) also noted that the case for many programs was that even when the benefits of the intersession program are widely communicated, families in disadvantaged areas were unlikely to have transportation to school if not provided by the district.

Another issue worth noting is that for decades, schools have utilized summer school programs to provide students with extra remediation and support for learning. Proponents of the balanced calendar argue the use of quality intersessions has a greater impact on success versus that of a summer long program, however no controlled studies between the two groups have been conducted (Cooper et al., 2003).

Student Engagement

While student achievement dominates the narrative about what makes a school or a school reform successful, it is not the sole business of public schools in the 21st century. Increasingly, schools and stakeholders point to the importance of active student engagement in school as a driving factor in improving such metrics as attendance, discipline, long term achievement gains,

and socioemotional learning (Appleton et al., 2008). It is essential to assess the relationship between student engagement and balanced calendar initiatives and the additional class time they provide. In a case study of 14 schools with reforms aimed at providing additional class time to students (extended calendars, extended school days, and intersessions through balanced calendar initiatives were included), Adelman et al. (1996) noted the following in regard to the effect on student engagement:

The successes that many of our schools have had and the ways in which they measure them suggested to us that there are deeper lessons being learned by students than the information they give back on tests or the excellent work that they accumulate in their portfolios. They are lessons about values, responsibility, and respect, and they are delivered in many ways (p. 42).

These lessons are at the heart of socioemotional learning and show that whether or not additional time has a positive effect on academic achievement, there can be growth in other areas.

Attendance

Balanced calendar initiatives produce clear improvements to student attendance (Denisco, 2015; Rasmussen, 2000; Superville, 2020). A 1987 study of a Colorado district indicates significant improvements in student attendance in the first year of balanced calendar implementation (White, 1987). Palmer and Bemis (1999) also found significant improvements in attendance in the majority of the studies in their meta-analysis but found differences in overall effect size. Nevertheless, the authors thought it important to note the potential benefits to attendance of balanced calendars. Eliminating a long summer break, the researchers speculate, keeps students and families more in touch with their schools. Adding frequent breaks seems to reduce the risk for student burnout, even

if students have no extended summer break.

The JLARC (2012) study noted that the Virginia schools they researched reported 80% attendance at intersessions; even as compulsory attendance rules did not apply. This figure seems quite high, and when compared to an attendance rate of 20% reported in other states it seems positively astounding (JLARC, 2012). While the study provides considerable detail on intersession attendance, it does not assess the impact that the initiatives may have had on regular attendance. The lack of additional research in this area is surprising as attendance data is widely available and largely public.

Behavior and Discipline

Extended school time can have an impact on another important aspect of student engagement: student behavior (Adelman et al., 1996). Adelman highlighted the impact of “the school’s commitment to educate each individual student, offering support services and a sense of caring, and emphasizing that each individual--adults and students alike--has responsibility for the welfare of the school community” (p. 45). The authors noted the potential for extended school year programs to have a positive impact on school discipline because they help faculty and staff forge and maintain positive relationships with students. While the bulk of specific research on the impact of balanced calendar initiatives on student behavior is specific to multi-track initiatives (Alcom, 1992; Ghlin, 1988; Opheim et al., 1995; Proctor & Venable, 1996; Young & Berger, 1983), a 2002 case study by Michael Lowe of one school’s single-track balanced calendar found significant reductions in negative student behaviors at the elementary level. Lowe (2002) quotes one teacher who noted, “I think they (students) are changed people. I think that it is easier because of the calendar. They are not so long without structure. The breaks are shorter and they don’t fall into or regress back into a lot of previous habits” (p. 54). Another teacher added, “I feel that the breaks in

the ... calendar allow the children to get some relaxation, some stress out of their own system.. so when they come back they are ready to learn. I feel they learn more because there is less time getting back into that routine” (p.54).

Additional research that examined teacher perceptions of single-track balanced calendar initiatives across North Carolina indicated a strong belief among teachers at these schools that the calendar improves student behavior and motivation while also positively impacting the graduation rate (Huffman, 2013). This research is limited by the lack of quantitative data to confirm teacher perceptions. Indeed teacher perceptions of the impact of a balanced calendar on student behavior may not truly be indicative of actual impacts on student behavior. What may matter significantly though is the impact of these teacher perceptions on teacher job satisfaction and relatedly, teacher retention; a case where perception may very well matter more than reality.

Teacher Engagement

There is a lack of research exploring the relationship between single-track balanced calendars and teacher engagement. However, teacher engagement has been studied extensively, and many findings are relevant to school divisions looking to implement single-track year round schooling. Similarly, the research on successful single-track balanced calendar initiatives have common characteristics that correspond to indicators found in research on teacher engagement or teacher departure. For instance, teachers are more likely to stay in schools with competitive pay, but also are more likely to depart schools with higher rates of non-white students, low SES communities, and schools with lackluster standardized test scores (Loeb et al., 2005). These conditions impacting teacher retention are often cited as justifications for schools to try a single-tracked balanced calendar model, especially when supporting academic achievement for students from low SES communities and overcoming the “summer slide.”

As previously mentioned, single-track balanced calendars are often used as a tool to address low performance on standardized assessments. The 2012-2013 NCES Teacher Follow Up Survey (TFS) found that dissatisfaction with testing and accountability measures were the leading cause of teachers leaving their schools. Additional analysis of the TFS concluded that approximately 25% of teachers leaving the profession cited the influence of testing and accountability measures as a significant factor in their decision to leave teaching (Darling-Hammond & Carver-Thomas, 2017; Podolsky et al., 2019). It stands to reason that if a school system can overcome the burden of the remediation cycle and high stakes assessments that drive a significant share of their curricular decisions, it will see improved teacher retention. Implementing a balanced calendar with targeted intersessions could narrow achievement gaps, reduce the burden of testing accountability falling on teachers, and in turn, increase job satisfaction.

Lower levels of academic achievement as measured by standardized test scores are often seen in schools serving high populations of students from lower socio-economic households (Cooper et. al, 2003). These school environments serving students with unmet needs often receive pressure to place an emphasis on standardized testing results. This focus is a leading factor in the decision of teachers to leave their schools or the profession (NCES, 2014). Furthermore, the unmet social and emotional needs of students, manifesting in discipline concerns in low SES environments are also linked to higher rates of teacher turnover (Cooper et. al, 2003). Studies of school leavers have found that teachers leave schools composed of larger proportions of students historically identified as low-income and minority students at higher rates than other schools (Shen, 1997).

Teacher retention is greatly tied to relative salary within the local region. “Studies employing national data sets and state administrative data have found that teachers are more likely to quit or transfer when they work in districts with lower wages, especially relative to alternative

wage opportunities” (Loeb et al., 2005, p. 46). The National Center for Education Statistics 2012 - 2013 survey on teacher attrition and mobility found that 18% of teachers leaving the profession and 27% of teachers changing schools cited financial inequity challenges as a reason. To combat teacher attrition, some school systems have modified their pay scales. These modifications include across the board salary increases, incentive pay, longevity pay, and additional income opportunities. Unfortunately, in many instances the least wealthy school systems are combatting the greatest challenges, and also offer non-competitive wages (NCES, 1997). The inclusion of intersession activities has presented HCPS with options to offer opportunities for extra pay. Under the HCPS balanced calendar plan, teachers are expected to teach at least one week of intersession, but can teach several more, increasing their pay by up to 7 weeks worth of salary. This facet of the HCPS Balanced Calendar Initiative could reduce the impact of regional compensation disparity and increase teacher satisfaction.

After controlling for salary, teacher educational background, and content area expertise, teacher working conditions emerge as a component of the teacher retention equation. (Loeb et al., 2005; NCES, 2014). Loeb et al. (2005) specifically define several conditions, such as collegial engagement, administrative support, student body composition and participation in decision making, the ability to get buy-in, increased teacher engagement, and satisfaction with the job (Podolsky et al., 2019). In an attempt to combat teacher attrition, HCPS is demonstrating with its balanced calendar a desire to give teachers a voice and support a positive working environment by encouraging teachers to develop their own topics of study for intersessions.

Sustainability

All reform initiatives have an imperative in common: the expectation that an organization should deliver results commensurate with the resources they require. Sustaining a reform initiative

like a year-round calendar requires both delivering on the promises of implementation and communicating those results in a way that convinces policymakers, politicians, and taxpayers that their investment is paying off. For HCPS to deliver on the promises they have tied to their balanced calendar initiative - ones tied to both concrete school improvement metrics and more abstract goals around deeper learning - a systematic approach to reform is a must.

Three Cases with Sustainability Lessons

While balanced calendar and year-round school calendar implementation in Virginia have never been widespread, there are school districts close to Virginia that have more extensive experience with the model. Wake County Public Schools in North Carolina's research triangle initially implemented a multi-track balanced calendar approach in some of their schools to ease overcrowding. The implementation was also to address pre-Recession growth predictions that called for enrollment increases of 5,000 students per year. The decision was not without controversy however as the conversion of some schools and not others left households juggling different school schedules (*Wake Cares Inc. v. Wake County Board of Education*, 2008). The public outcry over the decision grew so rancorous that the district's plan made its way to the Court of Appeals of North Carolina in 2009 with a coalition of parents arguing that the district was not permitted to change the school calendars without parent consent. The court ultimately ruled in favor of the district (*Wake Cares Inc. v. Wake County Board of Education*) but even as the district added more flexibility through a single-track modified calendar model in addition to the multitrack models, issues coordinating multiple schedules within households have plagued the initiatives ever since. Though multi-track and modified calendars persist in Wake County, the district website shows three distinct school calendars (*Wake County School Calendars*, 2021) and board presentations indicate that as

recently as 2017, the district collected stakeholder feedback on potential changes to streamline the district's calendars (Wake County Public Schools, 2017).

Within Virginia, Lynchburg Public Schools has shared an external evaluation of their limited, single-track year round school calendar at Bass Elementary School. In the 2015 presentation sharing their conclusions, evaluators noted program strengths in teacher support and commitment, school culture and climate, and in its ability to drive teacher collaboration. In spite of those strengths, the evaluators noted a lack of internal documentation around the program to effectively track progress toward goals and objectives that it described as “minimally defined.” Additionally, after a year of implementation, parent feedback included a request for empirical evidence of the effectiveness of the year-round school calendar. The evaluators left them with recommendations to further systematize the program at Bass Elementary School in order to ensure progress toward well-defined goals or abandon the one-school pilot in favor of further modifications to the district calendar as a whole that would improve the use of existing instructional time (Keller and Associates, 2015).

While the balanced calendar journeys of Wake County and Lynchburg offer significant lessons for Hopewell, the experiences of Petersburg Public Schools, a simple 20 minute drive away, offer valuable lessons in a very similar school context. Petersburg implemented the balanced calendar for the 2014-2015 school year using the same VDOE grant program as HCPS in order to increase total instructional time at one elementary school and one middle school. Their program design required mandatory intersession attendance for all students. In a progress report provided to the Virginia General Assembly, the division described their reasoning and method as follows:

Traditional instructional methods and practices have not yielded desired student outcomes in either identified school. The implementation of YRS and intersessions shortens student

breaks from school in an effort to prevent the loss of instructional time and the learning lapses that occur during traditional summer breaks. To aid in increasing desired outcomes in student learning, parents and community organizations will provide support during intersessions. Parents will attend workshops that will focus on teaching them effective instructional practices to use with their students in areas of academic need. School parent organizations and a year-round advisory group are implementing structures that will meet to provide relevant parent input and support to the schools and the parent populations of those schools (Virginia Department of Education, 2016, p. 138).

The progress update goes on to outline the continued expectation that Petersburg's intersession work would be aligned to the essential actions for school improvement that they pursued in the traditional school year. Using this extended time to pursue improvement in critical areas of academic need would help to eliminate the gaps that Petersburg judged arose due to summer learning loss. However, only a year later in their next progress update (Virginia Department of Education, 2017) Petersburg Public Schools reported that their program, "did not show anticipated results in SOL assessments. Therefore, the division does not intend to continue the program" (p. 34). Later in the summary, Petersburg detailed barriers and implementation hurdles that they felt may have contributed to the failure of their balanced calendar programs to reach its stated goals. They first pointed out instructional leadership hurdles ranging from, "a tremendous need for ongoing professional development... but never enough time to provide [it]" and "staffing the school with qualified teachers also remained a challenge" (p. 332). The turnover issue also extended to school leadership as the middle school had three different principals across the three school years that the balanced calendar initiative was in place. To compound these internal issues,

the division also noted challenges related to the fact that, “there was not a streamlined process for community involvement” (p. 332).

There are many takeaways for Hopewell to glean from the experiences of these school divisions; each no more than a two hour drive away. The first is that the decision to pursue a division-wide balanced calendar will ease implementation and help avoid logistic nightmares that can single-handedly turn public sentiment against the initiative. Another is one emphasized in the JLARC study (2012) and echoed by Lynchburg’s implementation of the balanced calendar at Bass Elementary School. It would be beneficial for HCPS to understand the importance of systematizing intersessions around well-defined and measurable goals for student academic progress. If HCPS learns from the lessons of these neighboring school divisions, and communicates that progress effectively, it has the potential to reassure a diverse body of stakeholders that investments of time, money, and other efforts into the balanced calendar will pay off.

Petersburg’s experiences are perhaps even more valuable due to the similarities and geographic proximity of the divisions as well as their realization that systematizing intersession development and delivery processes isn’t enough. Despite their intention to organize their intersession efforts around measurable school improvement goals, Petersburg still fell short of their school improvement expectations. While we do not have access to observation data that indicates the quality of intersession instruction in Petersburg, we do know that by their own admission there were significant instructional leadership challenges. We also know that research suggests that effective instructional leadership is a linchpin in the effectiveness of any extended school time initiative (Adelman et. al, 1996; Cooper et. al, 2003; JLARC, 2012). Considered together, these cases serve as valuable lessons for any division considering implementation of an extended school

time initiative to ensure that effective instructional leadership extends across all facets of their instructional calendar.

A Framework for Change

To offer insights related to systemic reform, we look to two sustainable change models - one from the business world and one specific to education reform. We consider these models to identify key components of sustainable change and assess their applicability to HCPS. The first of these two models is posited by well known change agent Kotter (1996). Its guiding principles revolve around The Eight-Stage Change Process:

Each of which is associated with one of the eight fundamental errors that undermine transformation efforts. The steps are: establishing a sense of urgency, creating the guiding coalition, developing a vision and strategy, communicating the change vision, empowering a broad base of people to take action, generating short-term wins, consolidating gains and producing even more change, and institutionalizing new approaches in the culture (p. 22).

While Kotter's Eight-Stage Change process is based in the business world, its steps have been utilized for educational reform since its inception. The argument on leading change versus managing change urges a systematic approach to garner stakeholder buy-in and continue progress. According to Kotter (1996), this set of processes includes "organizing, staffing, controlling, and problem solving" which must be considered when carrying out and evaluating change (p. 25). A leader's purpose is to utilize vision and inspiration to encourage others to move a change forward despite potential obstacles (Kotter, 1996).

The long term sustainability of a change comes from consistent communication of that vision, thus building a common understanding of the overall purpose of the change and a

continuous motivation towards the projected future. As gaining the full understanding of the purpose of the change is never an easy task, managers often do not spend the time necessary to project the information to all stakeholders and often under communicate, which may lead to inconsistent messaging (Kotter, 1996). Kotter (1996) goes on to urge keeping the message simple and direct while presenting the information in various forums, multiple times. Appropriate and timely communication is critical, as failure for stakeholders to accept and understand a vision almost certainly leads to a lack of action in moving the vision forward and gaining wins for additional change (Kotter, 1996).

Figure 4

Kotter's Eight Step Change Process



Note. Eight steps for implementing change start with creating urgency.

A Framework for Coherence

The Harvard Public Education Leadership Project (PELP) developed a sustainable change framework that focuses on coherence across the organization as a vital element in sustaining

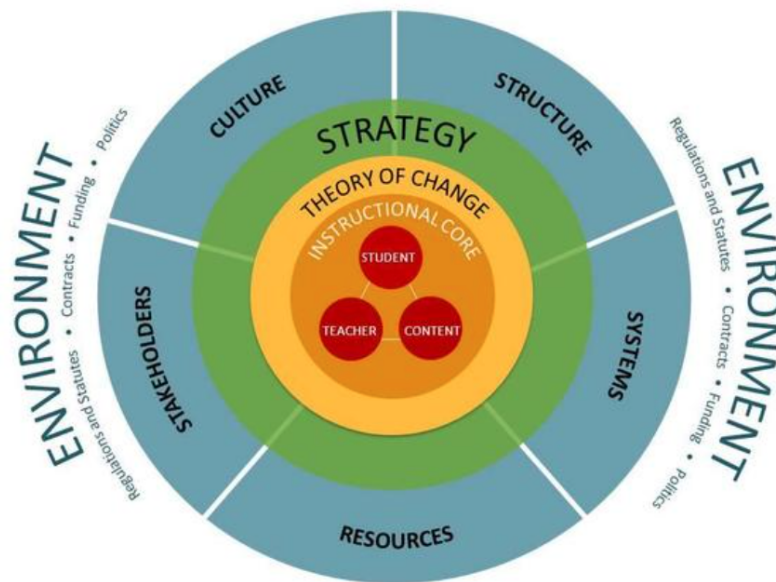
education reform (Childress et al., 2011). In this instance, coherence includes an actionable theory of change centered on a core focus on students, teachers, and learning, as well as actions that support that theory of change through an improvement strategy that encompasses every element of the school system (culture, structures, systems, stakeholders, and resources). The PELP model, visualized in Figure 5, also illustrates the importance of considering external stakeholders, policies, and conditions that influence the changes underway (Childress et al., 2011). The creators of the PELP Framework (Childress et al., 2011) describe the goal of assisting change leaders in:

recognizing the interdependence of various aspects of their school district – its culture, systems and structures, resources, stakeholder relationships, and environment – and to understand how they reinforce one another to support the implementation of an improvement strategy (p. 2).

The model embodies the “cliche because it’s true” educational platitude to “keep the main thing the main thing” by having at its core the instructional imperatives of teachers’ knowledge and skill, students’ engagement in their own learning, and academically challenging content. The PELP framework (2011) identifies division-wide coherence as the most essential element of change that sustains. As its authors describe:

Putting a district-wide strategy into practice requires building a coherent organization that connects to teachers’ work in classrooms and enables people at all levels to carry out their part of the strategy.

Figure 5

PELP Coherence Framework

Note. Graphic from the Harvard Public Education Leadership Project.

Application to Sustainability

Considered in tandem, these models for sustainable change provide valuable guidance to institutions considering, implementing, or attempting to sustain an educational reform. Guidance around sustainability is vital for HCPS as the first school system in Virginia to implement the single-track balanced calendar initiative across its entire division. With HCPS implementing the balanced calendar across their division, they may be uniquely positioned to ensure coherence at the division level, as all members of that part of the organization can be tasked with working within their defined roles to implement strategies that support the theory of change to a year-round model.

However, the PELP model also suggests that division-wide implementation presents a unique challenge to HCPS in ensuring consistency from school to school. This systemic coherence

is a focus that previous year-round school grant applicants have not had to coordinate. This means that individual members of the organization, from central administration to each of the school sites must coordinate, a daunting task even in a small school district. This unique challenge resides at the nexus between Kotter's perception of managing change versus leading change (1996). It is quite clear from the review of HCPS' internal documents that managing change associated with a shift to the balanced calendar has occurred. Further, division-wide implementation, rather than a piecemeal approach, will likely promote the coherence illustrated by the PELP framework but will also make management more complex. However, Kotter's 8-stage change process posits that initial implementation through organizational management is only a piece of the change puzzle and certainly not the same as the sustainable change that only leadership can enable (1996). It is vital that those entrusted with implementing the balanced calendar operate with an eye toward leading for change and not just managing change. Part of that change leadership for HCPS division-level leaders can be using the PELP coherence framework as a tool to: identify the actions they will take across the organization to support reform, integrate those actions with the theory of change, and ensure each part of the organization is working in concert toward the sustainability of the reform (Childress et al., 2011). Collective understanding of the five elements outlined in the PELP framework supports a commitment to coherence (Childress et al., 2011). Committing to and better understanding those factors are important for the drive to success and sustainability.

Stakeholders are a key element in the PELP framework as "people and groups inside and outside the organization who have a legitimate interest in the system and can influence the effectiveness of the strategy. These include teachers' unions, parents, students, school boards, community and advocacy groups, and local politicians and policymakers" (Childress et al., 2011, p. 11). Internal stakeholders are subject to the organizational management forces that are generally

within the control of the school division. As such, the other elements of the coherence framework work in concert to secure internal stakeholder buy-in. Exerting influence over external stakeholders is a different story entirely. Not only is connecting with many of these stakeholders difficult because they exist beyond the literal, figurative, and contractual walls of the division, but doing so can be especially challenging because, "...external stakeholders rarely agree on what success looks like" (Childress et al., 2011, p. 11-12). This reality leaves two options for ensuring external stakeholder support: building a broad coalition of the majority of external stakeholder groups, or securing the support of a smaller minority coalition of the most powerful groups (Childress et al., 2011, p. 12).

Another element of the coherence framework important to consider is the environment in which the client's balanced calendar initiative is being implemented. Childress et al., (2011) define these considerations as, "the environment in which public school districts operate includ(ing) the various funding sources available (both public and private), the political and policy context at the city, state, and national levels, the collective bargaining arrangements in place, and the characteristics of their particular community" (p. 12). As noted previously, these environmental factors are often beyond the direct reach of a school division but should not be ignored. In the case of the HCPS balanced calendar initiative, our document review indicates an environment currently quite favorable for implementation. School board meeting minutes and majority approval suggest that board members view the initiative as valuable and recognize the potential impact of the initiative on HCPS students. The General Assembly's renewal of grant money, even in the wake of a budget impacted by the COVID-19 pandemic, suggests that the initiative also remains a fiscal priority at the state level. Relatedly, the HCPS initiative was informed and encouraged by Virginia Superintendent for Public Instruction, Dr. James Lane suggests executive support to complement the legislative support. Since the support of external stakeholders and the favorable community and

political environment can be fleeting and difficult to maintain through organizational drivers alone, HCPS must cultivate this support through additional means. Given this need, we explored the literature on public sector marketing and the marketing of school reforms specifically.

Marketing school reforms to internal and external stakeholders to enable sustainability

With any new initiative, a school system's goal is not only to implement successfully but also to convince the citizens of the school district those changes are necessary and will deliver positive outcomes. In the case of Hopewell City Public Schools, a balanced calendar initiative must demonstrate the positive academic outcomes and deeper learning skills identified as the goals for the change. A modified school calendar is often met with "debate over...benefits and drawbacks typically...both academic and nonacademic concerns" (Shields & Oberg, 2000). These debates should inform marketing campaigns to help address such concerns and build momentum.

While the field of marketing is often associated more closely with the private sector or marketing associated with a competition for students to attend private schools, there is a rich vein of research defining and outlining strategies applicable to public schools seeking to market themselves to their community. Hanson and Henry (1992) define educational marketing as, "developing or refining specific school programs in response to the need and desires of specific target-markets (e.g., 'at risk' families, parents of preschool children, voters) and using effective means of communication to understand those needs and inform and motivate those markets" (p. 257).

While most educational marketing is for short term gains, strategic educational marketing can be utilized for long term goals. Strategic educational marketing "enables an educational system(s) to envision its future" and "links the realities of the present with the expectations of the future" (Hanson & Henry, 1992, pp. 257-258). One powerful example of gaining community buy-in for school based initiatives is the bond referendum, where through the power of voting, citizens

demonstrate their willingness to financially support an initiative (Giles, 1976). Through the use of bond referendum, school systems generate funds to support initiatives and high cost projects otherwise deemed unobtainable under the constraints of the fiscal budget. Obtaining these bonds is not for “routine educational matters, but rather is centered on episodic, volatile issues” (Giles, 1976, p. 447). While the idea of a bond referendum is not suggested as a funding mechanism for the balanced calendar, the elements of successful bond referendum campaigns can inform HCPS marketing efforts.

The likelihood of gaining community support is often driven by the ability of the voting citizen to see the direct impact the new initiative will have on their individual family. Bond referendums frequently struggle in larger districts, where the demographics and needs of the citizens differ greatly throughout the district; “therefore, districts should consider ways in which they can increase the beneficiaries from their bond issues” (Hanover Research, 2012, p. 5). School districts can do so by targeting marketing on the far-reaching impacts on the community at large, including the ability to demonstrate financial responsibility on the part of the district. “Disseminated information and public relations activities should focus on the benefits to children and the community. Supporters need to explain the benefits of a quality education to the entire community” (Holt et al., 2006, p. 24). A focus on financial responsibility and community impact helps to stimulate support, especially from voting citizens who no longer have students in the school system (Hanover Research, 2012).

Further, local school boards and superintendents “should utilize experts...to educate support groups” especially in the early stages of building an educational marketing campaign (Holt et al., 2006, p. 24). Consistent themes and messages, as well as frequent review of data points related to the implementation help to ensure the community remains aware of progress and the importance of

their support in the change. “(I)nformation can be disseminated through radio or television spots, local newspaper articles, brochures, flyers, or newsletters...” as well as “social media—such as Facebook or Twitter—to increase public awareness” (Hanover Research, 2012, p. 13). While elected officials and school administration can advertise and promote new school initiatives, community leaders and citizens are the most prominent spokespersons for gaining buy-in for change by “actively coordinating with and reaching out to community members, administrators can increase awareness of district needs...” (Hanover Research, 2012, p. 10). By activating a strong network of community support early on in the marketing of new educational initiatives, school districts have seen increased support in the final stages of implementation. The strong community-based support groups help to drive conversations and rally support (Holt et al., 2006). “(C)ommunity leaders—not district administrators—should be the primary advocates” for building community buy-in for school initiatives (Hanover Research, 2012, p. 11).

Holt et al. (2006) noted:

The most consistently identified variable contributing to a failed bond referendum was lack of understanding of the attitudes and perceptions within the community and among educational staff about the schools. When proponents of the proposal failed to identify negative attitudes and address them, opposition groups emerged (p. 22).

Clearly, stakeholder support requires maintaining communication that understands their interests and responds to shifts in attitudes. Continual reinforcement of positive strategic marketing as well as progress updates helps to ensure current interest and future investment in the school district (Hanover Research, 2012).

As Hopewell City Public Schools (HCPS) looks to begin implementation of the balanced

calendar initiative for the 2021-22 school year, marketing efforts should note the positive results seen within school systems who have already implemented modified calendars. Cooper et al. (2003) notes “that the students, parents, and staff that participate in modified calendar programs are overwhelmingly positive about the experience” (p. 43). With the combined efforts of district and school branding, community coalition, and experiential data-driven marketing, HCPS should be able to successfully garner community buy-in for the long term.

Chapter 3 - Methods

The purpose of our study is to assist Hopewell City Public Schools (HCPS) in sustaining community support for the balanced calendar initiative by providing research-grounded guidance for:

- the successful delivery of relevant and meaningful intersessions that foster student academic success;
- alignment with community goals;
- and communicating progress and successes with stakeholders.

Three research questions guide this study:

1. What are characteristics of successful and sustained balanced calendar initiatives?
2. How can the Hopewell community most benefit from the balanced calendar initiative?
3. How can HCPS communicate their progress in ways that increase support for the balanced calendar initiative?

Our research team approached data collection and analysis with a convergent mixed-methods approach (Creswell, 2014). The process involved conducting focus group interviews with Hopewell City business and community leaders and surveying the HCPS parent community using a mix of demographic questions, five-point Likert scale questions, and open response opportunities. The analysis of these results, in harmony with our analysis of HCPS internal documents, and findings of our literature review allowed the research team to make recommendations that will encourage sustainability of the HCPS balanced calendar initiative.

Constructivist Paradigm

In addition to the review of existing research, our research team used a non-sequential multi-method qualitative approach to collect and synthesize information from various stakeholders in the HCPS community. Qualitative research tactics are rooted in exploring the realities of the subjects as they perceive them (Mertens, 2019) utilizing vehicles such as interviews and focus groups. Our process and evaluation of results employed the constructivist paradigm. The constructivist paradigm assumes that knowledge and understanding are built, rather than found or discovered, from our experiences (Mertens, 2019). “Thus, constructivist researchers often address the processes of interaction among individuals. They also focus on the specific contexts in which people live and work in order to understand the historical and cultural settings of the participants” (Creswell, 2014). Thus, qualitative tools enabled our research team to collect rich stories from Hopewell City residents and HCPS employees, and the constructivist lens allowed our research team to form an understanding of their realities in conjunction with the research subjects.

Data Collection

In general, our methods for collecting data were done independently of each other, but we found that there were commonalities during our analysis. Our three main sources of data collection were a review of HCPS documents, a survey administered to HCPS parents, and focus groups consisting of Hopewell business partners and community leaders.

Document Analysis

A thorough document analysis was conducted of the client’s complete internal and external documentation related to the planning and implementation of the balanced calendar. The conclusions drawn from this document analysis are outlined in detail in chapter one. However, it is important to highlight it here as well since document analysis is employed as a method for

qualitative research to give voice and meaning around a set of documents (Bowen, 2009). Further, this document analysis helped drive decisions to employ the additional research methods described below.

Surveys

Generally, surveys allow for data collection from a large number of participants but the responses must be evaluated carefully since they rely on *self-reports* of respondents' attitudes or knowledge (Mertens, 2019).

The initial round of survey responses collected during the first distribution supplied enough data regarding preferred means of communication to inform plans for the second distribution. Accordingly, Facebook and email were identified as the digital communication methods that would yield additional parent participation in the survey. Additional functional updates to the survey were made to address data from the first round of distribution that indicated a survey completion rate of around 50% of participants who opened the survey. Those modifications included streamlining the questions to a single scroll document versus the originally developed multi-page survey. After the updates to the survey functionality, the completion rate for attempted surveys became 100%.

To complement the parent survey, our research team also chose to incorporate the additional qualitative data collection method of focus groups.

Focus Groups

Focus groups are an effective method for researchers to collect information from multiple subjects simultaneously while also reducing the pressure or anxiety felt by the subjects (Onwuegbuzie et al., 2009). The setting is also ideal for uncovering perceptions and ideas held by participants that may not be revealed through other means (Mertens, 2019). Our research team

conducted four focus group interviews, two with local business leaders and two with Hopewell community leaders. There were 12 members of the business group and 6 for the community leadership group. Each focus group meeting began with an introduction to that included our purpose statements and research questions. We instructed participants to answer any of the 6 questions in which they felt comfortable and respond to the other focus group members as they saw fit. The resulting meetings had a conversational tone that lasted between 60 - 80 minutes.

For the purposes of our study, creating an environment conducive to dialogue and discussion proved ideal for revealing potential friction areas for our study to address. These conversations provided insight into how we can meaningfully connect HCPS' deeper learning focus vis-à-vis their balanced calendar initiative to the goals of current and prospective business and community partners. Furthermore, the focus groups yielded an exchange of ideas and communication of shared values between and among community stakeholders that allowed our Capstone team to draw broad conclusions about client actions to leverage the support of those groups and individuals to drive long term sustainability of the balanced calendar initiative.

Research on the use of focus group conversations to conduct market research points to their ability to help teams understand how participants perceive issues, resolve conflicting viewpoints, and form consensus (Mertens, 2019). Mertens posits that it is this deliberation and interaction with ideas that makes focus groups ideal for market research, which is aligned with the purpose of our research team (2019).

Data Collection

We conducted four focus groups via the Zoom platform due to COVID-19 restrictions for social distancing - two with Hopewell City community leaders and two with Hopewell City

business partners. The two business focus groups consisted of a broad range of members of the Hopewell City business community including representatives from the local Chamber of Commerce, U.S. military base at Fort Lee, and those from small businesses and larger industries. The participants in the final two business partners' focus groups were composed predominantly of the representatives from the local Chamber of Commerce. The two community leader focus groups also consisted of a broad range of representatives from the lay community, fine arts organizations, service organizations, and elected public officials. Between the two focus groups composed of members of the business community there were a total of twelve participants and there were six members total across the two community leader focus groups. One participant attended two focus groups; once as a community leader and second as a business partner. We assured the participants of anonymity and therefore have assigned them the identification outlined in Appendix F.

We constructed a set of focus group questions designed to explore the extent to which participants were aware of the balanced calendar initiative, their engagement with it, and their willingness to support and help sustain it (see Appendices G & H). From the focus group sessions, our Capstone team sought to ascertain their level of support for the balanced calendar initiative and to give them a forum to communicate their perspectives on the skills and knowledge they expected HCPS graduates to develop.

Limitations

There are possible limitations inherent in our qualitative and quantitative research methods. Response bias, an over-reliance on virtual communication modalities, and sample-selection could impact the reliability and validity of our results. Our research team's acknowledgement of these limitations enables us to account for them in our analysis and conclusions.

Chapter 4 - Data Analysis and Research Findings

In this chapter we share the results of the mixed-methods data analysis as they relate to the sustainability of the Hopewell City Public Schools (HCPS) Balanced Calendar Initiative. This chapter focuses on the analysis of key stakeholders' input collected via focus groups and an online survey. Our survey and focus group data collection window ran from December 2020 until the end of January 2021.

The research questions that guide this portion of our study are as follows:

1. How can the Hopewell community most benefit from the balanced calendar initiative?
2. How can HCPS communicate their progress in ways that increase support for the Balanced Calendar initiative?

Focus Groups

Data Analysis

Each focus group session was recorded and the recordings were outsourced for transcription to an independent provider - Rev Services. Across the four focus groups we identified common terms which we categorized into sixteen thematic codes. Some key terms were common solely to the business partner focus groups; others were common to just the community leader focus groups. Research question two seeks to determine how the Hopewell community can most benefit from the balanced calendar initiative. With this guiding question as a standard we found that six major themes from the sixteen codes emerged as central and significant to our study. The six major themes are: communication, consistency, community, opportunities, student passions, and soft skills. Moreover, these six themes can be summed up within two overarching topics - engagement and preparation.

We found that both the business partners and community leaders are prepared to support the Hopewell City Public School system with the balanced calendar initiative. The coding of the transcripts from both focus groups revealed components that the participants considered important relative to their industries and consequently the success of the balanced calendar initiative. Our third research question asks, “How can HCPS communicate their progress in ways that increase support for the balanced calendar initiative?” Our research found that the participants desired to have more engagement from Hopewell City Public Schools through communication, consistency, and community engagement. Focus group participants indicated that their industries would benefit from HCPS graduates better prepared for the workforce and adept at taking advantage of opportunities, following their passions and exhibiting more developed soft skills.

Desire for Engagement

The focus group participants indicated a desire to better understand the balanced calendar initiative by being kept in the communication loop. In the words of focus group participants: “I don’t think the communication with community partners has been as strong as it needs to be.” (CL3), and “One of the big problems they also do have, I think, that has been tacitly touched on by a few people is a communication issue. What does the balanced calendar mean? What is available? What are the schools doing? So, yeah. I just like to be informed ... ” (BP6). The business partners and community leaders would like clear direction from HCPS as to what they want from them. Another participant proposed it this way: “Maybe come to us with more of a defined picture of, ‘Here’s what I want,’ and then really making sure that it’s communicated well, ...” and “we need to be made aware of ... In advanced time, of what the needs are going to be, and we can certainly try to accommodate whatever those are, but we just need to be made aware of it and communicated with.” (BP12).

Participants articulated that HCPS' communication around the balanced calendar was strong in the early phases but efforts diminished over time: "We got off to a pretty good start with the conversation and then we had to shut it down. We didn't keep it going." (BP3), and "I would imagine that the need for the students and the community to be fully informed every step of the way in order to keep buy-in" (BP11). It is noteworthy that communication emerged as a prominent theme from the business partners and community leaders' focus groups. A gap in effective communication between HCPS and its stakeholders has the potential to weaken the balanced calendar initiative in the initial stages of the project. Notably, as we explore the results of our survey of HCPS parents we will find complementary viewpoints about the need for increased communication.

In general, the focus group participants indicated their willingness to support the HCPS balanced calendar initiative. Participants' primary worry is the likelihood that balanced calendar implementation will be consistent and predictable. Specifically, community leaders expressed they did not want to show up for something that was not going to happen. Community leader CL3 noted: "And one other thing that I wanted to mention ... is an issue that I have found in my research in Hopewell, which is the importance of, I think ... you used the word consistency, I think consistency is very important. I think consistency from the schools is also very important." They also expressed that students would benefit from consistency and structure from the school system: "I think that oftentimes the youth that we're working with in Hopewell, they're really looking for structure, they're looking for consistency and they're looking for support." (CL3)

Interest in building collective pride

In addition, we found that the focus group participants agreed that HCPS and the City of Hopewell would benefit from a sense of community. The business partners and community leaders desire to see HCPS graduating students develop a sense of pride in the Hopewell community at large. This desire for students to feel a sense of community pride could manifest itself in the balanced calendar programs. Community focus group participants articulated specific community factors (lack of opportunities and nurturing environments as in neighboring communities) that inhibit Hopewell students from experiencing this sense of community pride. Participant CL6 commented about these issues stating “Our children in Hopewell have those issues because the design of the community has not been intentional for their wellbeing.” Participants (CL4) and (CL6) both also noted this position: “So it’s just a great partnership between what we hope is a stronger and stronger business community and linking with our young people to encourage them to be a part of that” and “I would do everything that I could to help create a community that the students could look at and say this community loves me. This community wants me to thrive and prosper.” At the same time, business partners and community leaders would like students to glean a more global perspective. Focus group participants shared a desire for students to know the world outside of Hopewell City. At least two of the other community leaders made comments along the same line. Another participant articulated this point in a broader sense: “I hope the schools are able to give our kids a view into a bigger world outside of just where they live. Where they can see that there’s all sorts of different opportunities, there’s opportunity to travel and to see other places and bring some of that back to where you live ...I really hope that our schools give kids a more global perspective outside of our little city” (CL2).

Focus group statements indicate Hopewell community leaders and business partners are still

interested in collaborating with HCPS in the balanced calendar initiative and that HCPS can expect to experience continued support. In fact, community leaders and business partners demonstrated interest in further exploration and extension of partnership with the school system.

Interest in Graduate Opportunities and Student Preparation

Participants felt the City of Hopewell would benefit from the balanced calendar initiative if HCPS students took full advantage of the variety of opportunities offered. There is further evidence of this viewpoint in a statement from participant CL3, “We cannot assume that every child is made to tick by the same things. So by opening the opportunities to everybody ...” “So just the opportunity for exposure, the opportunity for inspiration. These things build hope. They build the idea that anything is possible.”

The perspective that community leaders and business partners want to ensure that HCPS students take advantage of a myriad of opportunities is loosely tied to the expressed desire that the school system also tap into students’ personal passions and interests. Community leader participant (CL1) expressed this comment repeatedly throughout the focus group session. It is best highlighted in the following statement: “I mean if you can help them find something they love to do, whatever that may be, math, juggling, magic, playing the saxophone, and just have them realize that you can be successful in your own passion.” Additionally, the analysis of the focus group transcripts suggests that the participants want additional benefits from the HCPS system.

In addition, participants expressed some concern with the preparation of graduates for life beyond schooling. The business partners’ focus group in particular expressed that students lack soft skills that would make them more marketable in the workplace. One participant (BP2) stated that “What I’ve seen when we’ve had school visits is that there’s really an absence of soft skills. Simple

soft skills.” Still another (BP1) indicated that “I hope to have some influence or ability to provide feedback that encourages our school divisions to focus more on the soft skills and things, ...” This particular individual and another participant were more specific in their meaning of the term: “I think the most beneficial thing for me as a business owner that the kids could get out of it is that it’s a time for many workshops on a lot of these soft skills and things like writing workshops.” (BP1) “I would feel that there [*sic*] would be very important for them to make sure that the students were grounded in some of the soft skills that are necessary, perhaps, maybe for them to take advantage of internships ... ” and “ ... to work with the students ... ensure that they had ... the ability to be able to present themselves in a professional manner, written communication skills, oral communication skills, soft skills, ... ” (BP11) These statements indicate that the business community feels that they would benefit from the balanced calendar initiative if it included the development of these soft skills in the students.

However, the focus group participants do not advocate that HCPS sacrifice basic career and technical skills (CTE) to the development of the desired soft skills. They would want to ensure the development of both skill sets. Indeed, numerous references regarding CTE programs came from participants in the business partners’ focus groups. One such participant summarized this view saying, “We have a very hard time finding people that are qualified ... And even it’s becoming more difficult to find qualified mechanics, general mechanics. So, whatever the school systems can do to encourage folks to pursue educational paths down more in the trade, or to even encourage them to get involved in shop classes and things like that, the more technical trades even in high school, I think that’s a real need in the community.” (BP5) A participant from a different focus group added to this viewpoint - “... what are the things that we need to be focusing on so that kids have the flexibility to go into any one of our businesses and be successful? That should, to me, be

the base of K12. And then their passion areas we layer on top of career and technical choices that they can all make. That would be giving them the tools to have flexibility ..., but that baseline of what you need to be successful in any setting is important.” (BP9) Our analysis of the focus group statements shows a connection between soft skills and CTE development. Hopewell parents advocate similar requests through survey results.

The focus group community leaders and business partners indicate that they would most benefit from the balanced calendar initiative through communication, consistency, and community engagement. HCPS business partners and community leaders also expect the school system to produce students prepared to enter the workforce upon graduation by taking advantage of opportunities, following their passions and exhibiting more developed soft skills. These themes point to potential communication and content strategies for the balanced calendar and its intersessions that we will amplify in Chapter 5.

Survey

Survey items were intended to ascertain levels of parent support for the balanced calendar initiative and what the parent community hopes to gain from it. The survey questions also gauge how the HCPS parent community defines success for the balanced calendar initiative and helps our research team to determine what means of communication are most desirable for addressing change and celebrating successes. The initial demographic questions aided in the disaggregation of data.

Data Collection

The survey was administered to parents of HCPS students in grades Kindergarten through 12th grade, to understand the expectations and perceptions this stakeholder group held for the balanced calendar.

The survey (see Appendix I) was administered through the *QuestionPro* survey platform to Hopewell City Public Schools parents and distributed to the parent community in two rounds. The first distribution was via direct text messages using the HCPS preferred web-based messenger platform Remind.com. The second distribution was sent two weeks later to parent emails and posted on the HCPS Facebook page. Participant email addresses were collected, with their knowledge, to ensure that there were no instances of parents responding to the survey more than once. A disclaimer was included stating that email addresses would only serve to prevent duplicate responses and would not be shared or used for any other purpose. At the conclusion of the survey window, results were downloaded in the statistical analysis software SPSS for cross-tabulation and analysis.

The demographic data of interest to our team and collected in the survey included: (a) child's school; (b) years of residence in Hopewell City; (c) whether the respondent was a business owner in Hopewell; and (d) whether the respondent was an employee of HCPS. The respondents were roughly evenly distributed between the five schools in the division. However, this distribution was not aligned with the distribution of the students in HCPS, with the elementary schools all being overrepresented in our survey and the secondary schools underrepresented as indicated in Table 1. The participants had a median residency of 10 years in Hopewell with 34.1% of participants indicating at least 20 years of residency. Business owners and HCPS employees represented 7.0% and 13.2% of respondents, respectively.

Table 1

Enrollment and response percentage per Hopewell City Public School

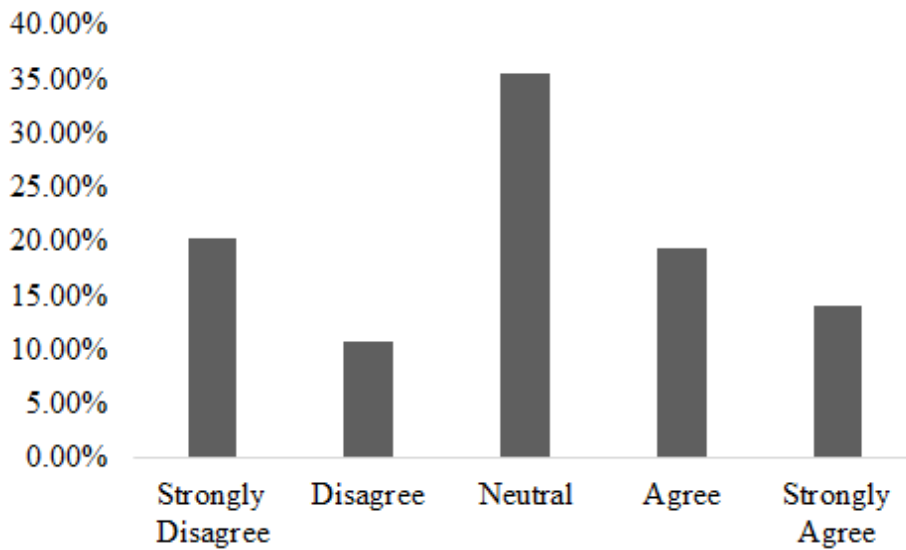
School	Enrollment	Percent Enroll. of HCPS	Response	Percent Response Based on Enroll.
Dupont ES	628	15.97%	59	18.26%
Harry James ES	545	13.86%	48	14.86%
Patrick Copeland ES	650	16.53%	71	21.98%
Carter Woodson MS	919	23.37%	71	21.98%
Hopewell HS	1190	30.26%	74	22.91%
Total	3932	100%	323	100%

Data Analysis and Findings

The survey was intended to help our team understand community attitudes about the balanced calendar. To that end, questions 5 and 6 asked respondents to rate their levels of support for the balanced calendar and their understanding of the initiative. A third of the respondents had a negative opinion of the balanced calendar, however 35.5% of respondents indicated that their level of support was neutral. With neither the positive or negative views of the balanced calendar achieving a majority of the opinion, there is a significant opportunity for HCPS to influence opinion of and win community support for their balanced calendar as indicated in Figure 6.

Figure 6

Parent levels of agreement with balanced calendar proposal



Question 6 measured respondents' understanding of the balanced calendar initiative. A majority of respondents, 61%, indicated they understood the balanced calendar to some degree. However, a cross tabulation of the questions "Do you support the balanced calendar initiative?" and "Do you understand the balanced calendar initiative" revealed a strong relationship between the level of understanding and support. A chi-square test of independence was performed to examine the relationship between balanced calendar support and understanding of the balanced calendar. The relation between these variables was significant, $X^2(16, N = 265) = 227.20, p = .00$. This relationship demonstrates that supporters of the balanced calendar are also more likely to understand the balanced calendar and vice-versa. Thus, HCPS could increase parental support by increasing communication on the benefits of the balanced calendar initiative (Table 2 and Table 3).

Table 2

Percent support of the Balanced Calendar as compared to level of understanding

I understand the Balanced Calendar	I support the change to the Balanced Calendar					Total
	Strongly disagree	Disagree	Neutral	Agree	Strongly agree	
Strongly disagree	82.35%	0.00%	17.65%	0.00%	0.00%	6.42%
Disagree	20.00%	40.00%	40.00%	0.00%	0.00%	5.66%
Neutral	7.25%	10.14%	76.81%	5.80%	0.00%	26.04%
Agree	16.67%	13.16%	28.07%	35.96%	6.14%	43.02%
Strongly agree	24.00%	2.00%	8.00%	8.00%	58.00%	18.87%

Table 3

Parent support of the Balanced Calendar as compared to level of understanding

I understand the Balanced Calendar	I support the change to the Balanced Calendar					Total
	Strongly disagree	Disagree	Neutral	Agree	Strongly agree	
Strongly disagree	14	0	3	0	0	17
Disagree	3	6	6	0	0	15
Neutral	5	7	53	4	0	69
Agree	19	15	32	41	7	114
Strongly agree	12	1	4	4	29	50
Total	53	29	98	49	36	265

Outcomes important to parents

The next series of questions measured the level of importance the respondents placed on the following school quality indicators: standardized test scores; quality of classroom instruction, school spirit and morale; teacher quality, variety of courses and programs, school recognitions and accolades. These indicators were selected because they each correlate to an outcome that HCPS listed in their initial YRS grant application seeking funding for the balanced calendar. Respondents recorded their responses on a Likert scale from 1 - Not at all important to 5 - Extremely Important.

Table 4

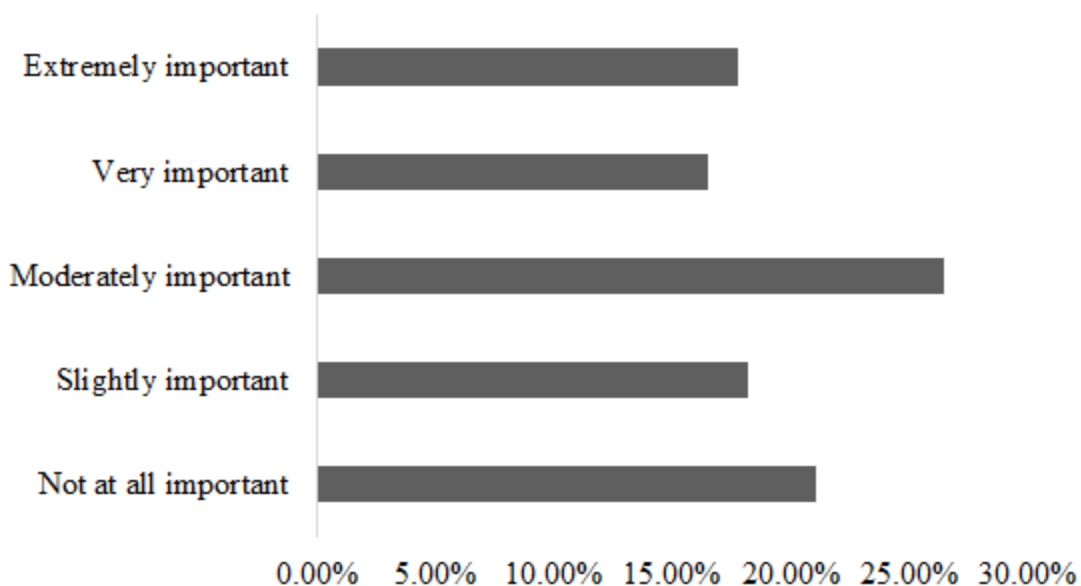
Percent importance of school quality indicators to parents

School	Not at all important	Slightly important	Moderately important	Very important	Extremely important
Standardized Test Scores	21.07%	18.18%	26.45%	16.53%	17.77%
Quality Class. Instruction	0.41%	0.83%	4.55%	26.03%	68.18%
School Spirit & Morale	0.41%	5.37%	19.42%	33.88%	40.91%
Teacher Quality	0.00%	0.41%	0.83%	19.83%	78.93%
Var. Courses & Programs	0.00%	1.24%	2.89%	33.47%	62.40%

As indicated in Table 4, all of the school quality indicators, with the exception of one, had at least 69% of the respondents rate their importances as “extremely important” or “very important.” The standardized test quality indicator had a significantly different distribution with the most common responses being “Not at all important” and “Moderately important” (Figure 7). This suggests that one of the listed goals of the balanced calendar for the grant, the reduction of failure rate on the End of Course Standards of Learning Exams(SOLs), may not be very meaningful for significant portions of the Hopewell community. This difference between the goals of the funding grant and the goals of the community requires HCPS to navigate differing priorities, with financial support dependent on meeting the former and community support more dependent on meeting the latter.

Figure 7

Distribution of results from standardized test scores as a measure of quality



A disaggregation of these responses across the five different schools showed no significant difference between the attitudes of each school community. However, it should be noted that the value placed on standardized testing was lower for secondary schools than elementary as noted in Tables 5 and 6. This difference could indicate that when schools report on the student experiences and success of the balanced calendar program, they could use this information to determine targeted communication.

Table 5

Parent level of importance of standardized test scores by school

School	Not at all important	Slightly important	Moderately important	Very important	Extremely important	Total
Dupont ES	11	11	15	13	14	64
Harry James ES	7	8	12	13	11	51
Patrick Copeland ES	15	10	22	11	16	74
Carter Woodson MS	18	11	21	12	14	76
Hopewell HS	21	16	25	10	14	86
Total	72	56	95	59	69	351

Table 6

Percentage of parent level of importance of standardized test scores by school

School	Not at all important	Slightly important	Moderately important	Very important	Extremely important	Total
Dupont ES	17.19%	17.19%	23.44%	20.31%	21.88%	18.23%
Harry James ES	13.73%	15.69%	23.53%	25.49%	21.57%	14.53%
Patrick Copeland ES	20.27%	13.51%	29.73%	14.86%	21.62%	21.08%
Carter Woodson MS	23.68%	14.47%	27.63%	15.79%	18.42%	21.65%
Hopewell HS	24.42%	18.60%	29.07%	11.63%	16.28%	24.50%

The next set of questions are a series of Likert scales that solicit the perspectives of the participants regarding the various aspects of intersessions. Respondents recorded their responses on a Likert scale from 1 - Not at all important to 5 - Extremely important. The intersession qualities evaluated were (A) Extra time for and support for student course work (B) Academic learning opportunities beyond the students' current courses (C) Workplace and vocational experiences (D) More frequent breaks in the school calendar and (E) Organized activities for students during breaks.

Table 7

Percent importance to parents of specific components of the balanced calendar

	Not at all important	Slightly important	Moderately important	Very important	Extremely important
Extra time and support for your student's course work	3.31%	4.55%	16.53%	36.78%	38.84%
Academic learning opportunities beyond your student's courses	1.24%	6.20%	19.01%	35.95%	37.60%
Workplace and vocational experiences outside of your student's courses	4.13%	4.13%	23.14%	34.71%	33.88%
More frequent breaks in the school calendar	11.57%	11.98%	28.93%	26.86%	20.66%
Organized activities for students during school breaks	14.46%	10.74%	25.21%	26.45%	23.14%

Respondents indicated they found both extra time and support for student coursework and academic opportunities beyond student's current coursework to be meaningful uses of the intersessions, with both aspects receiving greater than 70% responses at the "very important" or "extremely important" rating level. On the other hand, respondents indicated more frequent breaks and organized activities for students during intersessions were not priorities, with fewer than 50% of respondents rating these qualities as very or extremely important as indicated in Table 7. These results indicate the academic opportunities as well as workplace and vocational experiences are widely valued among respondents while the modifications to the calendar itself are less valued.

Reaching families

The survey asked "which communication methods are effective for HCPS to communicate updates regarding the progress of the Balanced Calendar Initiative to you, choose all that apply?" As indicated in Table 8, respondents identified email and text messaging as effective, with 80.1% and 69.0% selecting these means respectively, with phone calls rating at 45.5%. This result should be perceived as encouraging for the HCPS leadership since a significant portion of respondents find the current communication methods effective. However, when coupled with the lack of understanding in the community about the balanced calendar, identified in both the survey and focus groups, it appears that the communication method may be less of a culprit than the content or frequency.

Table 8

Preferred methods of communication

Method	Count	Percent of Respondents
Email	196	80.1%
In Person Events	36	14.9%
Mailed Newsletter	66	27.3%
Phone Call	110	45.5%
Social Media	100	41.3%
Text Message	167	69.0%
Website	90	37.2%

Social media was rated as the fourth most preferred method of communication, with 41.3% of respondents selecting it as an effective communication tool. However, Facebook was the overwhelming favorite with 205 of 242 respondents indicating preference for the platform as a school communication tool. These data indicate Facebook is likely the best social media platform for HCPS balanced calendar communication. It should be noted that Facebook is one of the delivery mechanisms that we used for this survey, thus a possibility of bias exists within these results. However, given that email and text messaging were also used these results are likely significant.

In addition to learning about the HCPS communication preferences, the survey sought to determine the types of content respondents were interested in receiving about the balanced calendar. Respondents rated their interest using a Likert scale from 1 - Very Uninterested to 5 - Very Interested across the following types of communication content:

1. Academic achievement data
2. Participation data
3. Testimonials from students
4. Testimonials from teachers
5. Testimonials from business and community partnerships

6. Images and videos of intersessions
7. Opportunities for parent and community involvement

Figure 8

Likert scale of interest in type of communicated information

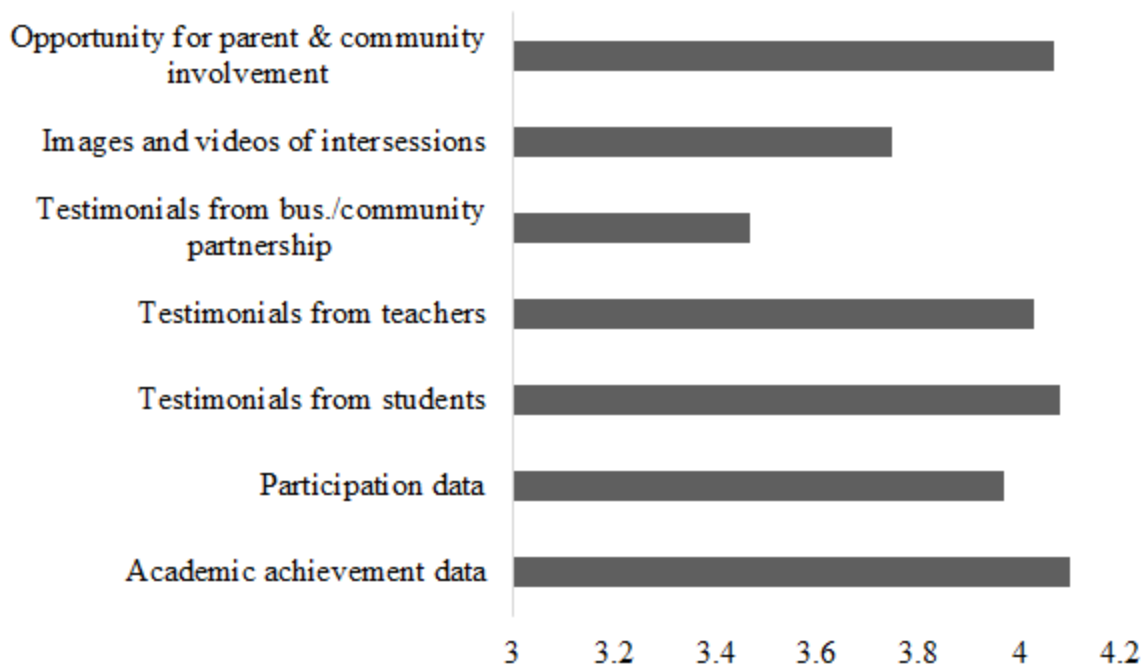


Figure 8 reveals that respondents were relatively uninterested in testimonials from the business and community partners about their experience with the balanced calendar. These responses indicate that HCPS should tailor its communications regarding a balanced calendar around the student, teacher, and family experience. It should be noted that while parents indicated on earlier survey items that they weren't particularly interested in standardized test results as a measure of school quality, they indicated they do want information surrounding academic achievement related to the intersessions. An implication of these dual expectations is that HCPS will need to frame achievement data without relying solely on standardized test scores.

In an effort to understand how extending the school calendar could align with the vision and desires of the parents within the school community, respondents were asked “What outcomes do you want for your student(s) in the Hopewell City Public School system beyond the traditional academic successes such as grades, test scores, and graduation?” The 242 responses were coded in similar fashion as our focus groups. Given the open ended nature of the question it was expected that the responses would vary significantly. However, similar to our focus groups, two large ideas emerged: preparation for a variety of experiences and the need for increased engagement about the balanced calendar between schools and stakeholders. Responses that are representative of these recurring themes are included below.

Preparation and Engagement

Parents communicated their desire that HCPS both engage their students with more meaningful instruction and prepare their children for a wide variety of life outcomes through academic, social, professional, and dispositional development. In the open ended survey question, several parents drew distinctions between test-prep academics and the outcomes parents wanted for their children. A recurring narrative was that test-prep instruction was not engaging or relevant for their student. “Become more than just book smart. Teaching for just a SOL is not doing my children any good,” said one parent. Another respondent stated, “SOLs need to go away so kids can focus more on learning what really needs to be taught instead of teaching and focusing on SOLs.”

Along with shifting away from standardized test focused instruction emerged a connection between such curriculum and disenchanting students. “I want my kids to love school. To actually enjoy learning. I wish yall would focus on the kids that really need the help. Because it’s waiting until the last minute when they are really struggling that makes kids hate school.” Another parent added, “that they have learned something they are passionate about and are able to still continue it

after school is finished.” While the two comments differ in tone, they both indicate a desire for HCPS to connect with students’ needs and passions.

The concept of life-skills was a consistent idea expressed in parent responses to the prompt. Several respondents delineated specific skills and tasks they believed HCPS students should be able to perform. One parent stated:

To be able to successfully navigate through basic functionality of living in today’s society without feeling lost in how to do basic tasks. Bill paying, how to turn on lights and water, how to find their internet provider, basic banking knowledge so they can balance a budget, strong sociological skills so they may communicate effectively with those around them are some of the skills I would like them to learn. Computer / technological skills that will help them go through life.

In addition to listing specific skills, broader concepts about life-outcomes and mindsets emerged. Respondents acknowledged a need for HCPS students to develop independence, job readiness, and the ability to engage in a diverse world. One parent simply stated their desire for “Practical hands on training and experience.” Another wrote:

A more equal opportunity to succeed in adulthood by transitioning to the phase in life with the skills necessary [for] understanding [*sic*] important academic material as well as life skills and an ability to [do well] in a diverse environment.

A few respondents spoke to the changing workforce and the new skills required to achieve success. One parent requested “career training opportunities within the school year, thereby increasing student motivation during the school year” with another taking a broader stance:

I want the schools to change the way they operate and think. I want them to focus more on collaboration than competition for an A in a class. Yes, in the real world there is competition, but you have to learn to adapt and collaborate with the people you work with.

While not all parent responses represent specific expectations of the balanced calendar, they do provide an opportunity for HCPS to use the balanced calendar to bolster programming or fill the gaps between existing curriculum and community expectations. While there are variations in the skills and outcomes desired by the community there is a clear expectation that HCPS prepares students beyond the state mandated curriculum and for education to be relevant, engaging, and accessible to students.

Conclusion

Two significant themes emerged from our focus group and survey data analysis; preparation and engagement. The engagement and preparation themes forge the Hopewell community opinion, sustainability models, and successful year-round school research into a clear direction for HCPS that addresses the desire for relevant educational opportunities that prepare students for life after K12 school. Our results reveal that increasing community support will rely largely upon providing opportunities for interaction between stakeholders and the school system. The next chapter discusses the findings and recommendations for HCPS leadership to consider in order to ensure a high quality instructional program that meets the expectations of the community and wins the support of even the skeptical Hopewell City resident.

Chapter 5 - Recommendations

Summary of the Study

The purpose of our study is to assist Hopewell City Public Schools in sustaining community support for the balanced calendar initiative by providing research-grounded guidance for:

- successfully delivering relevant and meaningful intersessions that foster student academic success;
- aligning with community goals;
- and communicating progress and successes with stakeholders.

Anchoring data was gathered via extensive external literature and internal document reviews. This provided a research-based overview of what factors are present in successful year-round school initiatives and how ensuring those factors are present in the client's program can inform long term programmatic sustainability. The internal data also provided a full picture of our client's approach to securing support from teachers, board members, and the community to pursue balanced calendar implementation in the initial planning stage. The information gathered from these internal and external reviews went on to inform both the line of questioning for a series of community and business leader focus groups and the structure for the HCPS parent survey. This quantitative and qualitative data was then synthesized with the lessons gleaned from the internal document and external literature reviews to inform the recommendations found here. These recommendations are each aligned either specifically to one or more of the goals above. To provide the proper context for these recommendations, a discussion of the work done by HCPS during the balanced calendar planning process is also provided.

Interpretation of Findings

The sustainability of the HCPS balanced calendar initiative is dependent on the continued support of a diverse body of internal and external stakeholders. Since its inception as a research group tasked with evaluating the potential for success of different extended school time approaches in HCPS, those involved with the balanced calendar initiative have been dedicated to securing the buy-in of these important stakeholders. From open and effective communication with a school board willing to take risks for the sake of improving student outcomes to a dogged commitment to creating intersession proposal and compensation systems that secured nearly unanimous teacher support for the initiative, HCPS has demonstrated success in generating support for this change. Notably, it has also avoided missteps that can spell doom for the sustainability of education reform initiatives.

Building upon the critical foundation for sustainability provided by these successes, we have formulated the recommendations below to assist Hopewell Public Schools in delivering relevant and meaningful intersessions that foster student academic success and align with community goals. Further, our recommendations will include strategies for effectively communicating the progress and successes of the initiative in a manner that positively impacts stakeholder perceptions to drive long term sustainability. Recommendations for progress toward the goals outlined above are designed for the specific request for assistance submitted by our client. However, we feel they are also a valuable resource for any school or division considering implementing a single-track year-round school model. Particularly given the recent focus on year-round initiatives as a means to address learning loss related to the COVID-19 pandemic, we expect the recommendations below will provide relevant and valuable considerations for leaders and stakeholders in a variety of educational settings.

Limitations

Typically, these recommendations would be heavily informed by case studies of school divisions who have sustained balanced calendars, however because Hopewell is so unique in implementing the calendar division-wide, we did not find comparable case studies. Further setting apart the Hopewell initiative is its emphasis on the balanced calendar as a driver for deeper learning alongside student achievement. As such, these recommendations represent a synthesis of research into factors that have been present in successful and unsuccessful approaches to extended school time and sustainable change, along with the unique internal and external stakeholder values of the HCPS community as gathered from client interviews, document analysis, survey, and focus group research.

Our research and recommendations are also limited by the fact that the survey responses and focus group responses occurred within at least nine months of abiding the COVID-19 pandemic. This fatigue brought on by changes related to schooling and other dimensions appears in numerous responses to open-ended questions on the survey, including those that reflect preferences to delay the balanced calendar for the sake of allowing students to have “one normal year.” It is not clear whether this viewpoint reflects an actual desire for the traditional calendar or just a general desire for normalcy in light of a year of quarantine and heightened anxiety around the pandemic. Regardless, all of our survey and focus group data reflects the unique COVID-19 education and policy-making environment. While we are confident in our belief that the recommendations below are applicable to Hopewell and may be helpful in other contexts, it is important to consider the possible limitations presented by the unique time period and conditions of COVID-19.

Another limitation that should be considered is that our research was conducted concurrently with continued development of the balanced calendar initiative by our client. The

shared Google drive to which our research team had full access throughout our work underwent continuous change in size and scope as our client continued work during our year-long engagement. While we evaluated many of the documents and presentations added during our project and used them to inform revisions and continued research, additional documents could impact recommendations and further research. Our project timing and programmatic deadlines drove an inability to respond to new information towards the end of our engagement. The addition of new information is a clear limitation and the uniqueness of this research as occurring within a specific point-in-time is worth noting. Finally, the bulk of the sustainability research we encountered was written as a post-mortem for abandoned or limited initiatives, while ours focuses on a dynamic initiative. Further research could inform sustainability of an initiative in active development.

In spite of these limitations, we feel that the following recommendations are responsive to our client's needs, informed by relevant, accurate, and innovative data. Our recommendations represent the synthesis of the literature review, document analysis, survey, and focus group data outlined in chapters two, three, and four. The recommendations also reflect specific guidance actionable for our client in their division-specific context. Ultimately we anticipate that what we recommend will also have the potential to benefit other schools and divisions considering the implementation of a year-round school calendar initiative.

Recommendation 1: Secure support for the balanced calendar initiative from ambivalent members of the parent community

Achieving the ambitious goal of developing and sustaining the first division wide balanced calendar in the state of Virginia will require a coalition of motivated employees and impassioned community members. HCPS can begin the additional work needed to build and sustain this coalition immediately. Kotter (1996) outlines an Eight-Stage process for sustainable change where

each step in the process informs and enables the next. Our client is at a pivotal transition point of this process wherein they have committed the time and effort to crafting a vision for their initiative and have worked tenaciously to secure the support of valuable internal stakeholders, like faculty and staff and school board members. Kotter (1996) suggests that their next step is effective communication of their change vision and empowering a broad base of people to take action while also warning that this step often poses a significant threat to sustainability. As gaining the full understanding of the purpose of a change is never an easy task, managers often do not spend the time necessary to project the information to all stakeholders and often under communicate, which may lead to inconsistent messaging (Kotter, 1996). The task facing Hopewell demands leadership, not management.

The Harvard PELP (PELP) (Childress et al., 2011) framework suggests that communication and empowerment of external stakeholders in a way that wins support - financial, political, implementation among others - is a challenging yet necessary process. While internal stakeholders are subject to organizational management forces that are often within the realm of control of the organization, external stakeholders exist beyond the organization and respond to myriad factors that are dynamic and, at times, difficult to ascertain. Even when the factors that will drive external stakeholders are predictable, it also may be possible that embracing those could jeopardize the coherence of the strategy internally. Childress writes that, “Managing stakeholder relationships in a way that is coherent with the strategy is especially challenging because external stakeholders rarely agree on what success looks like” (p. 11-12). Doing this while also considering and accounting for the dynamic political and cultural contexts of the community and state requires careful planning around educating external stakeholders about the initiative and effective communication of the ways in which the initiative will benefit their children and community.

From offering significant financial incentives for teachers, to encouraging intersessions that reflect the personal passions of faculty, to systematic and transparent communication regarding pursuit of the balanced calendar, HCPS has worked tirelessly to ensure buy-in from internal stakeholders. This buy-in has been instrumental to the initial success of the initiative's planning and implementation stage and, if expanded with similar care, will be vital in ensuring long term sustainability.

The next goal for HCPS must be to secure the buy-in of the community beyond the walls of HCPS. A majority of the parents and guardians of HCPS students surveyed by our team indicated that they did not understand the balanced calendar initiative. Additional survey data indicated that as the level of understanding of the balanced calendar increased, support for it did as well. Conversely, as understanding of the balanced calendar decreased, so did support. In addition to this, the data indicated that even though a significant number of families were neutral in their support for the initiative, a majority indicated that they were interested in learning about greater opportunities to be involved in their children's education through the balanced calendar.

This data poses both a problem and tremendous opportunity. The problem is that after three years of planning and communication a significant percentage of parents and guardians of HCPS students - a group that will be disproportionately impacted by the calendar changes that occur as a result of the balanced calendar - still do not feel as though they understand the initiative. This issue likely speaks to a combination of factors. A significant factor is the sheer amount of time spent securing the support of internal stakeholders. This is not a fault in HCPS' planning. As Kotter's (1996) eight-stage model indicates, the work to secure support of these internal stakeholders takes precedence. Further, the Harvard PELP (2011) model suggests that influencing the internal factors impacting sustainability is a less complex task than influencing an external community impacted by

the political, financial, and cultural environment. The data does suggest that the division now has an opportunity to educate more of their parent community. Not only will engaging in that work ensure that families understand the why and the how of the balanced calendar, but the data also suggests that doing so will increase support for the initiative for both families and the community.

Specifically, we recommend that HCPS secure support for the balanced calendar from neutral members of their family community by engaging in the following steps. First, HCPS should design and implement a systematic and targeted communication plan to educate the Hopewell community on how the structural changes brought about by the balanced calendar will be implemented and how those changes will benefit students and the community. This plan should align to additional data from chapter four as to which aspects of the initiative specifically and generally families feel are most significant. Specifically, families communicated a desire to be informed as to how the balanced calendar is helping their students develop socioemotional skills like persistence and self-regulation as well as life skills like financial literacy and career planning. Second, HCPS should capitalize on the high rate of families indicating that they'd like to get involved in their child's education through the balanced calendar by developing family volunteer and observation opportunities. HCPS will also need to demonstrate the ways that the balanced calendar can drive traditional academic achievement and deeper learning. Inviting families to see that work in action will serve not only to educate as to the "how" of the balanced calendar, but will also paint a vivid picture of the "why." Our research suggests that HCPS will grow support vis-à-vis educating families about the initiative and creating broader conditions to help forge sustainable and productive connections with families.

Recommendation 2: Communicate progress toward deeper learning goals to families, community members, and business partners

The plan to use deeper learning as a conduit for achieving the goals noted in the HCPS grant application appears throughout the division's working documents and surfaced repeatedly during multiple interviews with balanced calendar coordinator, Byron Davis. It was clear that if there is one non-negotiable the division has for their balanced calendar, it is embedding deeper learning into intersessions.

Recommendation one was informed by data indicating that HCPS currently has a plurality of families, community leaders and business partners in need of greater understanding of the balanced calendar. The data indicates far more about how HCPS should structure their public-facing communication regarding student growth that occurs as a result of the balanced calendar. Specifically, focus group and survey data is indicative of a community that cares far more about progress toward softer academic skills than specific standardized testing results. The data from both focus groups and the survey suggests that the community wants to hear and see more about how schools are developing these soft skills doesn't necessarily mean that HCPS isn't developing these skills. However, it does indicate that HCPS should create a communication plan that clearly and effectively highlights student progress in the area of transferable academic and life skills. Public celebrations of successes in this area will be most effective in positively impacting sustainability. Our data indicates that specifically, the community wants to see student progress in writing, presentation, financial planning and budgeting, and professionalism among other skills. The division's communication plan should highlight and celebrate growth in these domains. Our data indicates that not only is the community less concerned with standardized testing, but in some cases it is hostile to standardized test prep as the sole focus of instructional time. As such, focusing

public-facing communication around standardized testing achievement may have little or even negative impact on public support.

This is not to say that the division should be anathema to the sharing of hard data. To the contrary, it is vital that Hopewell devises a method for collecting and tracking data that documents growth in these skills. Data collection is not only required by the VDOE grant process but will be essential in ensuring the kind of instructional leadership proposed in recommendation three. The logical next step once this data is being collected and tracked internally is the development of a public facing data dashboard that enables internal tracking of student growth and skill development to inform instruction and external tracking that communicates progress toward deeper learning goals with quantitative data.

Fortunately, developing soft skills is part and parcel to the Deeper Learning Framework foundational to HCPS and is well understood by faculty and staff. However, in communicating progress and celebrating successes, HCPS must adapt this language and approach to make “deeper learning” a readily accessible, jargon-free concept to those outside of education. Making deeper learning user-friendly to its families and community partners is essential to ensuring the benefits of this targeted communication effort.

Recommendation 3: Create structures and processes to ensure that intersession instruction drives student achievement through deeper learning and promotes programmatic sustainability

At the meta-analysis level, the literature is generally mixed as to the overall effectiveness of year-round school and single-track balanced calendar initiatives in driving academic achievement and other education outcomes. However, there is powerful evidence that success is rooted in the

quality of instruction occurring during this extended time (Adelman et. al, 1996; Cooper et. al, 2003; JLARC, 2012). Though it is quoted in chapter two it is worth highlighting a quote from Adelman (1996) regarding the importance of high quality instructional planning for intersessions. His team noted of a failed year-round initiative that, “This experiment might have worked if the district had invested in a planning and development stage prior to full implementation and if there had been clear and mutually understood goals for how the time should be used” (p. 47). This message was echoed in internal documentation from our client’s neighbors in Petersburg Public Schools who pointed to inconsistent instructional leadership as a factor in their initiative’s ineffectiveness in driving improved student achievement within its operational timeframe (Virginia Department of Education, 2016).

To their credit, Hopewell Public Schools has created a process for intersession proposal and approval that leverages teacher strengths and passions to create a wide range of engaging intersessions for their students (Hopewell Public Schools, 2020a). The process for students and families considering enrolling intersessions has been created with a similar eye toward engagement. HCPS has created a student and family friendly digital catalog platform that creates additional support for student and family choice in intersession enrollment. Relatedly, the intersession proposal process demands alignment to a division-wide deeper learning framework and more traditional academic achievement metrics such as the 10% reduction in failure rate in each of the core content areas that HCPS spelled out as a VDOE grant application goal (Hopewell Public Schools, 2019). In an internal planning document, balanced calendar coordinator, Byron Davis offered the following for building-level administrators and instructional coaches to guide intersession proposals:

We want our intersessions to have a “wow factor” that makes students and teachers want to come back and makes parents want their kids to return. [They] need to be fun and exciting... Learning that either directly or indirectly supports state and division goals needs to take place as well. It’s the reason we’re here (Hopewell Public Schools, 2020b).

As the division moves from the planning and proposal stage to implementation and supervision, it is vital that they ensure a similar level of alignment and coherence with academic goals in instructional leadership and oversight of intersession delivery.

This imperative is echoed in the Kotter (1996) and Harvard Public Education Leadership Project (PELP) (2011) sustainable change frameworks. Kotter (1996) posits that a lack of coherence around communication, language, and processes can create inconsistent messaging and subsequently doom a change initiative. In addition to issues with messaging, a lack of coherence from instructional leaders to faculty in regard to exactly what is expected from intersession experiences will lead to an inconsistent product. Such inconsistency will impact student experience as well as internal and external stakeholder perceptions as to the purpose and necessity of the initiative in the first place. The PELP (2011) framework highlights that, “Putting a district-wide strategy into practice requires building a coherent organization that connects to teachers’ work in classrooms and enables people at all levels to carry out their part of the strategy.” Using the PELP (2011) framework lens to view the work already undertaken in Hopewell, it is clear that the planning that has occurred since 2017 has “built the coherent organization.” The next step is to use the tools of instructional leadership to ensure the connection to teachers’ work in classrooms and enable internal stakeholders across the organization to contribute effectively.

Division leaders should supervise intersession delivery in a manner aligned to the division’s goals just as their plan for supervising instructional delivery throughout the course of the traditional

school year. Additionally, intersessions should be monitored and supervised horizontally across school sites to ensure common purpose, practices, and language. Just because intersession topics diverge from traditional academic disciplines doesn't mean that the core elements of successful instructional leadership must also diverge. Even if the data and lesson planning may be non-traditional, the tasks most closely associated with contemporary instructional leadership, like data tracking and lesson plan feedback, must still apply in the intersession setting if students are to achieve the intersessions' desired outcomes. The school division should lead for progress toward deeper learning goals, engagement, and improved literacy via intersession instruction, just as they would in traditional instruction. Observation and evaluation of intersession instruction should reflect best practices of instructional leadership just as observation and evaluation of traditional school year instruction should. HCPS should establish the expectation that the primary goal for intersessions is achieving the student outcomes identified in their VDOE grant application via deeper learning. Intersession instruction that isn't a driver of these outcomes could significantly inhibit long term sustainability of the HCPS balanced calendar.

Using HCPS' current model, we recommend that this instructional leadership for intersession be structured as follows. First, because planning and delivery of one intersession is built into all teacher contracts, HCPS should evaluate instructional planning and delivery along with student academic growth as measured by pre and post-tests during the intersession period as part of the formal teacher evaluation process. By doing this HCPS will set the expectation that intersession instruction is subject to the same high standards as traditional calendar instruction. Further, this will give school administrators an opportunity to directly influence the quality and alignment of intersessions. In order to effect the kind of distributed leadership that research has shown to positively impact school culture, student achievement, and myriad additional school quality metrics

(Leithwood, 2009), Hopewell should create a formal instructional leadership role for intersessions. In the context of HCPS, we recommend creating a scope of work for intersession coordinators that asks them to first observe and assist in the formal evaluation of intersessions alongside building-level administrators and then mirror those practices on their own for informal evaluation of additional non-contracted intersessions. Creating this sort of collaborative observation process, has the potential to create a deeply authentic professional learning community among intersession coordinators and administrators. By asking them to engage in conversations with one another about what deeper learning really means and how it looks in practice, the division - in keeping with its emphasis on authentic learning experiences for students - will emphasize authentic learning for faculty and administrators around observation and instructional feedback. Not only do we believe that this practice will ensure a common and coherent standard for intersession instruction across the division, we believe that this will provide leadership experiences for intersession coordinators that will reap positive rewards across the school year. These coordinators should be empowered to exercise these leadership tools within their individual schools to create similar peer observation and instructional feedback processes for teachers, and in so doing build a culture of deeper learning for teachers that mirrors that being built for students.

Regardless of the way in which HCPS decides to pursue this recommendation, it is listed here because it is foundational. Ensuring that structures are in place to ensure alignment of planning and delivery of intersession instruction to program goals and outcomes is a critical step to program success and sustainability.

Recommendation 4: Design intersessions to intentionally highlight and develop career and life-readiness pathways

The Hopewell Public Schools Deeper Learning Framework calls for students to participate in learning experiences that are authentic in their leveraging of career and life skills to communicate learning. In an internal document from May 27, 2020 (Hopewell Public Schools, 2020d), the division highlights the following questions for instructional leaders to ascertain the presence of deeper learning in student learning experiences:

Table 9

Driving questions for supporting instructional leaders in the realm of deeper learning

<u>Driving Questions for Deeper Learning</u>
<ul style="list-style-type: none"> ● Was this work challenging and open ended? ● Were multiple answers possible? ● Was this work personalized and designed with students? ● Was this work linked to real questions of importance? ● Did this work connect ideas to broader frames, concepts? ● Did this work mirror the activity of adults working in the field? ● Did this work challenge students to create knowledge rather than simply receive it? ● Did this work require collaboration for success? ● Did this project result in products that are shared beyond the classroom?

Our survey and focus group data points to convergence between these driving questions and the goals the Hopewell parent, community leaders, and business partners have for HCPS generally

and for intersessions specifically. While survey respondents and focus group participants never specifically demand “deeper learning” for students’ academic experiences, repeatedly they stressed the importance of all of the central tenets of deeper learning. The quote below from chapter four is a great example of how these community members demand deeper learning without specifically mentioning “deeper learning:”

I want the schools to change the way they operate and think. I want them to focus more on collaboration than competition for an “A” in a class. Yes, in the real world there is competition, but you have to learn to adapt and collaborate with the people you work with.

This quote is just one example of the frequent demand noted in survey and focus groups for learning that goes beyond the standardized testing curriculum. And just as HCPS suggests that that learning will drive greater success on standardized tests, community members suggest that it will lead to greater engagement and a more personalized learning experience for students. Parents and guardians noted explicitly that they want Hopewell public schools to promote or provide, “students who are trained for the workforce,” “career training opportunities within the school year, [that] increases (sic) student motivation,” and “vocational job skill opportunities and relationships for employment partnerships within the local community.”

In tandem, HCPS’ commitment to deeper learning through authentic and personalized student learning experiences and their community’s overwhelming support for the development of life, college, and career readiness suggests an opportunity for future intersession development. Specifically, we recommend that our client create intersession sequences that reflect pathways to career and life readiness. While the first round of proposed intersessions are purposeful in their alignment to the HCPS Deeper Learning Framework, they are not yet vertically aligned to allow students to develop life and career readiness skills sequentially across multiple intersessions. As

presently constituted, students may develop presentation skills in one intersession, writing skills in another, and job interview skills in yet another. While this a la carte approach to skill development may appeal to many students and families, it does not fully leverage the potential of intersession instruction to intentionally prepare students for specific career and life goals.

In focus groups and in survey responses, business leaders were unequivocal in their support for school initiatives that work with employers to target and create plans to develop the specific skills that will help create employable graduates. A multi-intersession pathway that develops these skills and culminates in a student shadowing or apprenticeship experience is precisely the kind of deeper learning called for in Mehta and Fine's *In Search of Deeper Learning* (2019), a work cited by HCPS in developing their driving questions for deeper learning. Further, our data suggests that offering this kind of experience gets at exactly the kind of experiential learning that has broad family, community, and business partner support.

We are not suggesting that all intersessions should exist along a specific career experience pathway. Notwithstanding, using intersessions to provide targeted development of specific skills has broad support in the Hopewell community and among businesses. This type of alignment will also allow for intersession planning at elementary levels that is aligned for the development of specific socio-emotional needs. Measuring the growth of these skills and monitoring engagement and behavior metrics like attendance and discipline can - like communicating the development of life and career skills - provide valuable data points for sharing progress to stakeholders beyond traditional academic metrics. Going forward, students and families would benefit tremendously from having the option to participate in these types of intersessions, and businesses suggested that they would be willing participants in such an initiative. That this type of intersession design is at the essence of deeper learning that promotes the kind of internal coherence around vision and mission

suggested by Harvard PELP sustainability framework (2011). Simultaneously, it will drive support from external stakeholders by aligning the balanced calendar initiative to shared community priorities for public education.

Recommendation 5: Develop plans for long term fiscal sustainability

We find three major reasons informing the need for a long-term financial support plan. First, funding is a major reason for the ending of previously implemented year-round school programs. In Virginia, Hampton City Public Schools reverted back to a traditional educational calendar for 8 schools after being unable to obtain the financial backing needed to support their year-round calendars (JLARC, 2012).

Second, single-track balanced calendar initiatives come with additional costs in terms of staffing, transportation, capital expenditures (e. g. outfitting schools with air conditioning), and spending associated with serving students during intersessions. A 2012 study of balanced calendar initiatives in Virginia by the Virginia General Assembly's Joint Legislative Audit Review Committee (JLARC, 2012) found that the average cost of intersessions in the programs it examined was 3% of a division's budget. However, these figures varied considerably from school to school and seemed highly dependent on factors ranging from how many students take part in intersession programming to the nature of the intersession programs. And finally, sustainable programming requires sustainable resources. While the VDOE grant funding assists in the development of year-round schooling programs, the grant funds are not infinite. Accordingly, school districts seeking long-term sustainability must consider long-term resources.

To determine the specific costs of implementation of a year-round school calendar, we reviewed the cost projections of Hopewell City Public Schools and school systems in Virginia that

had recently implemented year-round school programs. By analyzing the known costs and projected costs based on other year-round schools, Hopewell City Public Schools will be in a position to futurecast funding needs to maintain the balanced calendar after VDOE grant funding ends. As Dr. Hackney noted, intersession staffing will be a continued challenge despite their inclusion in teacher contracts. The fluctuation of teacher availability and interest in leading intersessions could require additional funding which is unable to be futurecasted at this time.

Initial Cost Considerations

The Virginia Department of Education has awarded Hopewell City Public Schools \$1,500,000 for the start-up of an Extended School Year or Year-Round School Program. In addition, HCPS received permission to carry these funds over and is anticipating that this revenue will allow them to operate the program through the 2023-2024 school year. Even with this stable funding for the next three years, plans for funding ongoing operations will need to consider both potential costs and revenues. Hopewell City Public Schools' initial implementation cost of the balanced calendar initiative is \$762,500 per year. Their cost breakdown is as follows:

Table 10

Cost Analysis of Hopewell City Public Schools Balanced Calendar Initiative

Materials estimate Total number of course x \$500	\$233,000.00
Staffing estimate Supplement+Extended Contract x \$1000	\$143,000.00
Transportation estimate	\$120,000.00
Meeting estimate	\$35,000.00
Intersession Coordinator estimate	\$45,500.00
eCatalog Cost	\$20,000.00
Nursing estimate	\$25,000.00
Safety estimate	\$21,000.00
Other miscellaneous costs Includes Salary of Balanced Calendar Coord.	\$120,000.00
Total Estimated Cost	\$762,500.00

Note. Information from Hopewell City Public Schools master intersession assignments spreadsheet

While neighboring Chesterfield County Public Schools (CCPS) did not do a full school district implementation of year-round schooling, the school system had implemented a similar 45-15 year-round calendar in two elementary schools prior to the COVID-19 pandemic. In 2018, CCPS outlined a projected annual cost of \$175,000 for year-round schooling for a single elementary school, Bellwood Elementary. It noted the costs to be associated with

- The extension of an administrative contract to 12 month
- The extension of a registrar contract to 12 month
- Non-contractual payments to instructional staff
- Transportation

Upon implementation of a second year-round schooling program at Falling Creek Elementary School, CCPS noted more specific and increased costs.

Table 11

Cost analysis of Falling Creek Elementary School's year round schooling initiative

Project Manager cost	\$33,197
12-month Assistant Principal Contract (1 month extension)	\$8,375
12-month contract for Registrar (1 month extension)	\$4,302
20 Teachers (Intersession contract)	\$136,177
3 Instructional Aides (Intersession contract)	\$9,804
Transportation	\$45,737
Total Estimated Cost	\$237,592

Note. Information from Chesterfield County Public Schools school board work session presentation on January 29, 2019

A comparison of the three cost projections shows that HCPS is prepared to implement its program at a lower operating cost. With teacher contracts containing five built in days to support intersession instruction, and administrative positions already on 12-month contracts, the average cost per each of the five HCPS schools is approximately \$152,500 as compared to the \$237,592 seen in implementation at a single elementary school in neighboring Chesterfield County. These built in costs for HCPS reduce the amount of long term funding needed and increases the chance of financial sustainability. Further, the reduction of start up costs after consistent implementation of

the balanced calendar, such as meetings to develop the balanced calendar and a separate balanced calendar coordinator function, could save approximately \$150,000 per year. This reduction from initial cost projections would leave Hopewell City Public Schools with a yearly operational cost of approximately \$612,500. The reduction from initial costs, in combination with the embedded costs from already implemented HCPS contract features, position Hopewell, better able than systems in the JLARC study, to support long term sustainability of the balanced calendar.

Potential Funding Sources

State funding is the largest source of funding for the Hopewell City Public Schools' operational budget. Additional yearly funds come from the City of Hopewell, federal allocations, other funds such as interest, and a rollover fund, noted as the "beginning balance," from the previous year's budget. Rollover funds in the amount of approximately \$1.5 million dollars for FY19, FY20, and FY21 indicate HCPS has utilized state flexibility granted by the Appropriation Act, as noted in VDOE Superintendent Memo #158-18 (Lane, 2018), to roll over state directed aid in their public education funds. This provides the division the ability to use resources gained through conservative use of yearly state appropriations. A similar flexibility in carrying over local funds exists in HCPS. If HCPS is able to continue this expenditure pattern, and if approval of the carryover funding continues, the carryover balance remains a viable source for future balanced calendar operations as the anticipated yearly cost is only 1% of the total operating budget for the school system and only half of the typical yearly carryover total.

Table 12

Funding allocations for the FY21 Hopewell City Public Schools Budget

State Funds	\$33,661,350
Other Funds	\$58,200
City Funds	\$13,378,990
Federal Funds	\$5,067,288
Beginning Balance	\$1,848,123
Total Operational Funds	\$54,013,951

Note. Information from the FY21 Proposed budget for Hopewell City Public Schools

While HCPS has built in financial structures to help sustain the funding for the balanced calendar, most year round school initiatives require innovative funding solutions and a generation of interest from stakeholders. Considering ways to support the increased cost are necessary for both Hopewell City Public Schools as well as other school systems looking to implement a balanced calendar initiative. In Hopewell City, the yearly increase in spending is most likely to be enabled through new funding through the Hopewell City Council. Whether this occurs through rising property tax collections, reassessments of property values, or a dedicated tax increase, citizen support will be crucial to long term financial sustainability.

Recommendations for Future Research

While this study was focused on sustainability, as a result of delays associated with the COVID-19 pandemic it was conducted in the year before the balanced calendar and its intersessions began. In the first year of implementation there will be a tremendous amount of data generated

regarding student academic and engagement progress that will be invaluable in evaluating the success of intersession instruction. Further, new data will also show how initial successes and failures may impact sustainability. Future research that gathers data and creates recommendations for modifications to balanced calendar processes will be vital in assessing sustainability issues that arise once the calendar has been fully implemented.

Because Hopewell is so unique in choosing division-wide implementation of a single-track balanced calendar, future research-based evaluations of the sustainability of Hopewell's division-wide approach may be the first significant implementation case study of a division-wide year-round school initiative.

An additional area of research exists in the policy realm. As is highlighted in our cost analysis, the connection between the work of schools and the work of elected officials is one that must be taken into account when considering long term sustainability of a public program. Specifically, it is clear that further research could help identify the means by which Hopewell Schools can influence political actors like those on the Hopewell City Council who set the tax levies that provide the funds from which the Hopewell City School Board crafts their budget.

An additional area of research that is related specifically to the balanced calendar but around which much broader conclusions could be drawn relates to Hopewell's emphasis on leveraging teacher passions in designing intersession instruction. The extent to which teacher intersession development around hobbies and academic subjects about which they are personally passionate contributes to deeper learning within Hopewell's balanced calendar initiative should be monitored internally and by any future external program evaluators. If the school system proves effective in doing so, that is a conclusion that could have significant implications for curriculum development.

Conclusion

It is clear that the work Hopewell City Public Schools has done from 2017 through the spring of 2021 has not only been extensive but has aligned for securing the full-throated support of internal stakeholders. Without this work, any initiative this ambitious would be dead on arrival. The key players have also been incredibly consistent in aligning their work with their division's deeper learning framework. With this foundation in place, it was clear that the work of our team should focus on building long term sustainability through effective external communication and instructional leadership. Each component of our work, from our literature review to our selection of survey methods and subsequent recommendations, has been developed with a focus toward sustaining an initiative that sits on a foundation of innovation and deeper learning that can create a unique and engaging academic experience for students, faculty, and the Hopewell community.

With targeted communication to educate the Hopewell community as to both the structure of the balanced calendar and the ways in which it will contribute to both academic achievement and the development of life and career skills, HCPS will build support for the initiative through the simple act of increasing understanding. Additionally, by using the same communication mechanisms, HCPS should highlight the successes of the initiative in driving these positive changes, improving the business landscape, and the general quality of life throughout Hopewell. We firmly believe that it is critically important to pair this type of effective and targeted communication with an innovative approach to curriculum design, supervision, observation, and evaluation. By exercising coherent instructional leadership that is wholly aligned to its deeper learning goals for students and faculty, HCPS will signal that intersession instruction is as critical as instruction during the traditional school year and will create a system for intersession instruction that is as innovative as it is sustainable.

While these recommendations are tailored specifically to Hopewell Public Schools' Balanced Calendar initiative, we feel that the lessons learned and recommendations may help in other contexts. Specifically, these recommendations help inform the increasingly broad population of school divisions across the Commonwealth of Virginia and the rest of the United States that, in light of the COVID-19 pandemic, are considering year-round school for closing achievement gaps, promoting deeper learning, and pursuing a litany of other goals. Any division considering a change to their standard operating procedures as major as a year-round school initiative must do so considering the planning processes that will secure the initial support of internal stakeholders like faculty and staff along with a broad cross section of external stakeholders. To that end, when paired with an accurate understanding of the specific community context, these recommendations are broadly applicable and will prove effective in promoting programmatic sustainability.

It has truly been a privilege to gain a proverbial front-row seat for the implementation of an innovative and radical education reform. The fact that it all occurred during a once-in-a-century pandemic proved personally inspiring and academically fascinating; factors enabled entirely by working with a client that was fully committed to both transparency and accessibility. Our project began as an evaluation of a fully implemented program and rapidly morphed into an examination of the work Hopewell has done and how that work and future efforts will inform sustainability. Our recommendations around instructional leadership and communication are at the foundation of this continued sustainability and innovative work.

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Appendix A

Request for Assistance Response



**Working Title: Sustaining a Balanced
Calendar in Hopewell City Public Schools**

CLIENT: Supervisor of Balanced Calendar Implementation, Hopewell City Public Schools

RESPONSE TO REQUEST FOR ASSISTANCE

CLIENT NAME:

Hopewell City Public Schools

CAPSTONE TEAM:

Ms. Elizabeth S. Baber, Mr. Brandon S. Petrosky, Mr. Taylor M. Snow, Mr. Cleveland Walton III

DATE:

August 7, 2020

1. Key Participants**Client:** Hopewell City Public Schools**Contact Persons:**

Byron Davis

Karen Bowen

Capstone Project Team Members:

Dr. Kimberly Bridges, Capstone Chair

Ms. Elizabeth Baber, Doctoral Candidate

Mr. Brandon Petrosky, Doctoral Candidate

Mr. Taylor Snow, Doctoral Candidate

Mr. Cleveland Walton, Doctoral Candidate

2. Purpose of the Study:

The purpose of this study is to assist Hopewell City Public Schools **in sustaining community support** for the balanced calendar initiative by providing research-grounded guidance for

- the successful delivery of relevant and meaningful intersessions that foster student academic success;
- alignment with community goals;
- communicating progress and successes with stakeholders.

3. Research Questions

Research Question 1: What are characteristics of successful and sustained balanced calendar initiatives?

- Which characteristics may be beneficial to the success of the HCPS BC implementation and sustainability?
- What can be learned from schools or school systems that unsuccessfully implemented and/or did not sustain single track year round schools with intersessions?
 - Why did these schools or school systems revert to traditional school calendars?
- What resource needs are associated with sustained balanced calendar initiatives?

- How will HCPS work to ensure teacher engagement around their balanced calendar initiative ?

Research Question 2: How can the Hopewell community most benefit from their schools’ Balanced Calendar initiative?

- How will the City of Hopewell judge/perceive/ascertain success of Balanced Calendar?
 - What does the Hopewell community want from its schools beyond traditional academic achievement?
 - What issues does the community hope the Balanced Calendar will impact?

Research Question 3: How can HCPS communicate their progress in ways that increase support for the balanced calendar initiative?

- How can Hopewell City Public Schools communicate the success of the Balanced Calendar Initiative to Hopewell residents?
 - How can HCPS communicate the ways in which their balanced calendar initiative is successful in promoting deeper learning goals?
 - How can success as identified in the grant application be communicated most effectively?
- How can Hopewell City Public Schools market their successes to other educational agencies?

4. Data Collection Methods Correlated to Research Questions

	Survey / Questionnaire	Focus Groups	Interviews	Lit Review
Research Questions				
<u>Research Question 1:</u> What are characteristics of successful and sustained balanced calendar initiatives? Which characteristics may be beneficial to the success of the HCPS balanced calendar implementation and sustainability?				x
<u>Research Question 1:</u> What are characteristics of successful and sustained balanced calendar initiatives? What can be learned from school systems that unsuccessfully implemented and/or did not sustain year round schools?				x

<p><u>Research Question 1:</u> What are characteristics of successful and sustained balanced calendar initiatives?</p> <p>Why do school systems revert to traditional school calendars?</p>				X
<p><u>Research Question 1:</u> What are characteristics of successful and sustained balanced calendar initiatives?</p> <p>What resource needs are associated with sustained balanced calendar initiatives?</p>				X
<p><u>Research Question 1:</u> What are characteristics of successful and sustained balanced calendar initiatives?</p> <p>How will HCPS work to ensure teacher engagement around their balanced calendar initiative ?</p>			X	X
<p><u>Research Question 2:</u> How can the city of Hopewell most benefit from their schools' Balanced Calendar initiative?</p> <p>What does the City of Hopewell want from its schools?</p>	X	X		
<p><u>Research Question 2:</u> How can the city of Hopewell most benefit from their schools' Balanced Calendar initiative?</p> <p>What issues does the community hope the Balanced Calendar will impact?</p>		X	X	
<p><u>Research Question 2:</u> How can the city of Hopewell most benefit from their schools' Balanced Calendar initiative?</p> <p>How will the City of Hopewell judge/perceive/ascertain success of Balanced Calendar?</p>	X	X		
<p><u>Research Question 3:</u> How can HCPS communicate their progress in ways</p>			X	

<p>that increase support for the balanced calendar initiative?</p> <p>How can Hopewell City Public Schools communicate the success of the Balanced Calendar Initiative to Hopewell residents?</p>				
<p><u>Research Question 3:</u> How can HCPS communicate their progress in ways that increase support for the balanced calendar initiative?</p> <p>How can HCPS communicate the ways in which their balanced calendar initiative is successful in promoting deeper learning goals?</p>		X		X
<p><u>Research Question 3:</u> How can HCPS communicate their progress in ways that increase support for the balanced calendar initiative?</p> <p>How can success as identified in the grant application be communicated most effectively?</p>	X	X		X
<p><u>Research Question 3:</u> How can Hopewell Schools demonstrate and communicate successful implementation of the Balanced Calendar?</p> <p>How can Hopewell City Public Schools market their successes to other educational agencies?</p>		X	X	X

5. Resources Requested

- Internal Documents pertaining to the development of the HCPS Balanced Calendar
 - Board meeting minutes related to BC not yet uploaded to school board site
 - Possibly financial documents related to BC if necessary
- Access to staff for focus groups and interviews
- Access to community and staff email lists for digital surveys

- Access to community partner contact information (non profit and business) for focus groups, interviews, and surveys
- Access to students for focus groups (pending IRB approval)
- Access to HCPS Deeper Learning materials (training materials, internal documents, professional learning calendar)

6. Tasks and Responsibilities

- Literature review
- Develop Surveys
 - Parent
 - Teacher
 - Community
- Administer surveys
- Establish focus groups
 - Business partner
 - Teacher
 - Parent
- Develop focus group questions
- Conduct focus groups
- Establish interview list
- Develop interview questions
- Conduct Interviews

Appendix B
Request for Assistance



VCU

School of Education

Client Request for a Capstone Study (RFA)
Department of Educational Leadership, Doctor of Education Program

Our department is seeking robust problems of practice that are capable of being completed within a calendar year (starting in May and finishing by April of the following year).

Our 3rd year Doctor of Education (EdD) students complete group *Capstones* for their Doctor of Education degrees. Capstones address real problems of practice for clients (like your organization). Our students fulfill their degree requirements by completing work to address these problems of practice. These projects are mutually agreed-upon by you (client), a faculty member (Capstone Chair), and a student team of 2-4 members.

Over the years, our Capstone work has fulfilled many different needs for K-12, higher education, and community organizations. Here are examples of some of our Capstone titles:

- Increasing Doctoral Student Completion Rates within a College (for a four-year university)
- Teacher and Leadership Recruitment in a Fiscally Distressed Urban District (for a public school district)
- The Intersection of Diversity, Inclusion, and Audience Building in Performing Arts (for a community organization)
- Developing A Sustainable Model for Impactful Academic Advising (for a community college)
- Impact of Computer Science Implementation in K-5 Schools (for a nonprofit organization)

Students produce both a client-focused executive summary which contains key information and recommendations and a scholarly document which they defend as part of their university degree requirements.

Please note that there is no guarantee of selection as a Capstone; many factors contribute to the department's decision as to which projects selected.

Timeline of the process

- | | |
|------------------|--|
| January 31, 2020 | RFA submission deadline for projects to be completed by April, 2021. |
| March-April 2020 | Capstone chairs and students matched to selected projects; clients informed. |

May-August 2020	Client meetings to agree on the scope of work and the parameters/specifics of the study and sign an agreement; students begin work.
September 2020	Students present their research plan to their faculty committee for approval.
Oct. 2020-Feb. 2021	Students interact with client organization to collect, interpret, and analyze data.
	End of March 2021 Students craft recommendations, create an executive summary document, and formally present results to the client.
	Mid-April 2021 Students defend scholarly document to faculty committee as part of graduation requirement.

Your RFA (submitted on your organization's letterhead) should contain the information listed on the following application. Please be as detailed as possible to help us better gauge if we can serve your needs. Feel free to contact me directly with any questions about your application.

Submit your request no later than **January 30, 2020**, for consideration in the 2020-2021 research cycle.

Completed RFAs may be emailed in WORD or pdf format to

Kim Bridges, E.D.L.D.
 Co-Coordinator
 Doctor of Education Program
 (K-12 learning community)
 Department of Educational Leadership
 Virginia Commonwealth University
bridgeskm@vcu.edu

Tomika Ferguson, Ph.D.
 Co-Coordinator,
 Doctor of Education Program
 (Higher education learning community)
 Department of Educational Leadership
 Virginia Commonwealth University
tlferguson2@vcu.edu

Client Request for a Capstone Study (RFA)
Submitted to VCU's Department of Educational Leadership

Date: 1/21/2020

Client (organization): Hopewell City Public Schools

Contact Person(s): Byron Davis

Contact phone and email: 804-541-6400, bdavis@hopewell.k12.va.us

Sections of the Proposal:

Please answer in narrative form. Specific details will help us evaluate the project. Use as much space as necessary; most applications are several pages in length.

1. **Statement of the Problem:** What is the problem of practice that you wish the team to address? *Problems of practice are recognized as persistent and specific issues that impede the work of practitioners. These problems can hinder organizational responses to external challenges, create uncertainty within organizational decision-making, or reduce leadership effectiveness. These problems may require a response informed by both theory and practice (Carnegie Project for the Education Doctorate).*

Hopewell City Public Schools believes the agrarian school calendar no longer serves its original purpose, and a better calendar should be utilized to combat the specific problems of practice of 1) staff and student burnout, and 2) summer slide. We believe that addressing summer slide by creating additional creative instructional opportunities will allow us in turn to positively impact deficits in literacy, school accreditation, soft skills/professional skills, and equity. Many students in Hopewell experience poverty and are not afforded the same variety of experience and support as their peers. Additionally, we believe creative opportunities for non-traditional instruction that embed soft skills/professional skills through deeper learning will increase engagement and excitement for teaching and learning in both teachers and students.

The Hopewell City Public School system is the first district in Virginia to move entirely as a full district to this model of a calendar. Our hope is that the capstone team will be able to study the process, effects, and outcomes of this groundbreaking work and will be able to provide a conclusive report on their findings as well as recommendations for continued and future success.

2. **Background:** What is the specific context that led to this problem of practice? Provide the context of the organization and brief overview of the circumstances that led up to the issuing of the RFA.

Beginning during the summer of 2017, a number of teacher focus groups were formed and convened with the express purpose of conducting research and providing input and suggestions related to specific topics. The topics themselves were suggested by teachers. One of these focus groups delved into the topic of “year-round schools”. The primary problem of practice that was being considered was “summer slide”,

which refers to learning loss that occurs when students do not continue to learn and practice skills and concepts. Through this and subsequent research additional problems were identified that year-round schools have the potential to solve. Upon completion of their research and through their report, the teacher focus group suggested that Hopewell schools consider moving from a traditional calendar to a year-round calendar. This was not entirely unfamiliar territory. Many years prior, the school district had considered a similar move for a few of the schools, but due to the controversial nature of the change, the move was ultimately stymied by resisters. In response to the teacher focus group's suggestion, a grant application to research the feasibility of such a move was written and submitted to the Virginia Department of Education. The grant was approved, and new committees of administrators were formed to research and consider the possibilities. Research was conducted for a year and a half and involved review of articles, literature, and programs. The review of programs occurred both virtually and through visits. Per the VDOE research grant, at the conclusion of its grant cycle, grantees must make a statement to the VDOE regarding whether they do or do not intend to apply for an implementation grant. Hopewell City Public Schools, with permission from the school board, concluded to apply for an implementation grant and to move to a year-round model, which they referred to as a balanced calendar to avoid misconceptions. The application and approval from the local school board was for all Hopewell schools to move to a balanced calendar. The school board approved the calendar and the VDOE approved the implementation grant. The 2019-2020 school year is being used as a preparation year with a goal of smooth and successful implementation of the balanced calendar for the 2020-2021 school year.

- 3. Resources and Support Available:** What assistance will be available to the Capstone team? For example, the scope of the project may require access to data sets, documents, employees during working hours, email lists, or other research items. How will the client support the research endeavor?

We want this research and associated recommendations to be conducted, and we recognize a thorough study cannot be conducted without the proper information. Everything that is at our disposal will be at the capstone team's disposal via the Supervisor of Balanced Calendar Implementation (presently Byron Davis).

- 4. Expected Products and Timeline:** Will the suggested timeline above be feasible? Do you have any additional requests?

Our hope is that the capstone team will be able to study the process, effects, and outcomes of this groundbreaking work and will be able to provide a conclusive report on their findings as well as recommendations for continued and future success. We recognize that, as the first district to conduct this work in this way, others will look to us to better understand possibilities. The state superintendent recommended that we coordinate such a study. We believe this study will help Virginia, the United States, and even some in other countries that are trying to understand the advantages and disadvantages to moving to a balanced calendar (year-round) model. We recognize that mastery for any new program does take time and that the first step can provide the greatest learning curve, and we are interested in a multi-year study. We acknowledge that the existing program of study has a goal of being in one year increments, and if approved, we would request that there be additional years of study after the first year

Appendix C

Review of HCPS Internal Google Documents

Folder Name	# of subfolders	# of documents	Themes
Final	5	53	Intersession
Work in Progress	13	86	How to Documents
Presentations	4	31	Communication
Research	13	140	Initial Research
Total	35	310	

Appendix D
Grant Application

VIRGINIA DEPARTMENT OF EDUCATION

**FY 2020 Application for a *Start-up Grant* for an Extended School Year or
Year-Round School Program for School Divisions or Individual Schools**

A. GENERAL INFORMATION

School Division: Hopewell City Public Schools

Division Superintendent: Dr. Melody D. Hackney

Date of Submission: June 14, 2019

Division Contact: Dr. Jay McClain, Assistant Superintendent of Instruction

Telephone: 804-541-6400

Email: jmclain@hopewell.k12.va.us

Amount of Funding Requested: \$1,500,000.00

All applicants must read the Instructions for Application for a Start-up Grant for School Divisions Pursuing the Development of an Extended School Year or Year-Round School Program for School Divisions or Individual Schools before completing this application. Each applicant must comply with the instructions, which are available on the [Department's Website](#).

NOTE: This is an annual application process.

The completed PDF version of the application and related materials must be emailed to Kim Powell, Grants and Reports Manager at kim.powell@doe.virginia.gov by **5 p.m. on Friday, June 14, 2019**. The Department may reject proposals that are incomplete or late.

Please contact Dr. Meg Foley, Virtual Learning Specialist, by email at meg.foley@doe.virginia.gov or by phone at 804-786-0877 if you have any questions about the application process.

B. ASSURANCES AND SIGNATURES

By signing and submitting this application, the applicant assures that it will adhere to state and federal laws and regulations governing public schools, including the *Virginia Standards of Quality*, the *Virginia Standards of Learning*, and the Virginia Board of Education's *Regulations Establishing Standards for Accrediting Public Schools in Virginia*.

The applicant assures that all elements of the proposed school(s), including, but not limited to the school facility and location and school year calendars, will comport with all state and federal laws and regulations.

The applicant certifies that to the best of his/her knowledge the information in the application is correct, that the applicant has addressed all application elements as required in the Application for a Start-up Grant for Extended School Year or Year-Round School for School Divisions or Individual Schools, and that the applicant understands and will comply with the assurances.

The applicant assures that the applicant school division plans to implement intensive preparations to commence during the 2019-2020 school year, including the initial phase of calendar adjustment early next summer, with the full implementation during the 2020-2021 school year.

Signature of School Division Superintendent:

Date:

6/13/19



Signature of Chairman of School Board:

Date:

6/12/2019



C. NAMES AND PHYSICAL LOCATIONS OF PARTICIPATING SCHOOL(S)

Names of the schools participating in this grant request: Dupont Elementary, 300 S. 18th Avenue, Hopewell, VA 23860; Harry E. James Elementary, 1807 Arlington Road, Hopewell, VA 23860; Patrick Copeland Elementary, 400 Westhill Drive, Hopewell, VA 23860; Carter G. Woodson Middle School, 1000 Winston Churchill Drive; and Hopewell High School, 400 South Mesa Drive. The additional sites impacted by the move to a balanced calendar are Woodlawn Learning Center and New Hope Academy. They will participate together with the eligible schools but not directly as an eligible school.

D. TITLE AND PROGRAM DESCRIPTION

HOW WELL ARE THE CHILDREN OF HOPEWELL?

Among the most accomplished and fabled tribes of Africa, no tribe is considered to have warriors more fearsome or more intelligent than the mighty Masai. It is perhaps surprising, then, to learn the traditional greeting that passes between Masai warriors. "Kasserian Ingera," one always says to another. It means, "How are the children?"

This traditional greeting among the Masai acknowledges the high value that the Masai always place on their children's well-being. Even warriors with no children of their own always give the traditional answer: "All the children are well," meaning, of course, that peace and safety prevail, that the priorities of protecting the young, the powerless, are in place, that Masai society has not forgotten its reason for being, its proper functions and responsibilities. "All the children are well" means that life is good. It means that the daily struggles of existence do not preclude proper caring for the young.

I wonder how it might affect our consciousness of our own children's welfare if, in our culture, we took to greeting each other with this daily question: "And how are the children?" I wonder if we heard that question and passed it along to each other a dozen times a day, would it begin to make a difference in the reality of how children are thought of and cared for in our own country?

I wonder, if every adult among us, parent and non-parent alike, felt an equal weight for the daily care and protection of all the children in our community, in our town, in our state, in our country, could we truly say without any hesitation, "The children are well; yes, all the children are well."

What would it be like if the President began every press conference, every public appearance by answering the same question: "And how are the children, Mr. President?" If every Governor of every state had to answer the same question at every press conference: "And how are the children, Governor? Are they well?" Wouldn't it be interesting to hear the answer? What if religious leaders began every worship service by answering the question, "And how are the children?" If teachers began every class by answering the question, "And how are the children?" If every city leader had to

answer the same question at the beginning of every Council meeting: "And how are the children?" If every business leader and corporate executive had to answer the same question at the beginning of every work day: "And how are the children? Are they well?" Wouldn't it be interesting to hear their answers? What would it be like? I wonder... I wonder... And how are the children? Working together, may all our children in Hopewell be well.

~Unknown

Title of the proposed program:

Hopewell's Balanced Calendar 2020: *Expanding Opportunities for HOPE, 'til all the children are WELL.*

General description of the program:

Hopewell's Balanced Calendar 2020 establishes a Balanced Calendar division-wide across all five of its K-12 schools and related programs. As a revolutionary step in the state, Hopewell will become a leader in rethinking the way the student calendar is organized, being the only division to adopt a balanced calendar (the Hopewell version of the year-round schools' model) for the entire division, rather than just for one school.

The Balanced Calendar will generally follow a 45-15 model of 45 instructional days followed by a combination of 15 days of intersessions and breaks. The adjustment of how the 180 instructional days are allocated across the year will provide breaks throughout the year and decrease the number of weeks away from instruction during the summer, thereby reducing the "summer slide." The intersessions will provide opportunities for more focused instruction in literacy and other areas of need, as well as for deeper learning and more engaging instructional enrichment opportunities that "marry" student areas of interest with teacher areas of passion to transform the student learning experience. A primary goal of the program will be to offer a variety of intersession experiences to any and all Hopewell students, each delivered in a one-week intensive "camp" format, that will be centered around high-interest and motivating projects and community partnerships. Imbedded in these experiences include significant opportunities for deeper learning. Required instructional areas of focus in each intersession experience will include: collaboration, reading, writing, critical thinking, problem solving, creativity, research, analysis, and a public presentation of learning.

Rationale for the program:

Hopewell students need and deserve more. While the district has made some gains over the last several years in achievement, students continue to lag behind the state average SOL pass rate by 10 or more points in most subjects. Attendance is also a concern, with the chronic absenteeism rate likely not meeting the new accreditation threshold. In the new VDOE school climate survey, average student responses are below state averages in areas such as engagement and expectations. One elementary school and the middle school continue to struggle to meet state standards in English, and will most likely not meet requirements for accreditation again this year.

Students arrive at Hopewell school doors in kindergarten significantly behind. Fewer than 20% of children entering school know their letters and over 85% are identified through the early screening process of being behind in one or more key developmental areas. The district is perpetually in a “catch up” mode, and has concluded that more time on task for most of its students is the primary way to address this unfortunate reality.

Currently, the percentage of students not reading on grade level by 3rd grade exceeds 50%. Given the extensive research associated with this benchmark, there is tremendous urgency in this local data point. As a result, the middle school has struggled for years with meeting accreditation in English, as the gap in literacy only continues to grow as these students get older. Hopewell is dedicated to changing this but has become resigned to the reality that without more time to help these specific students catch up, the likelihood is not promising. While these challenges typically associated with districts representative of large pockets of generational poverty are not unique to Hopewell, the school system is dedicated to changing both a pervasive attitude of low expectations for its students, as well as their potential for future success moving forward. Educators in this system are convinced the vehicle through which this can be accomplished is the Balanced Calendar.

With this backdrop of challenges, it is also the case that Hopewell is gaining momentum for progress. The district has been at the cutting edge of work with deeper learning, proudly a part of the first cohort of the Virginia is for Learners Network, and has been routinely highlighted for our innovative work this year. Through the process of researching and considering the Balanced Calendar for Hopewell's children, the school community has generally become excited and motivated to find ways to deepen and sustain the progress and momentum already established.

Expected benefits:

Over time, the Balanced Calendar will positively impact students by reducing learning loss (summer slide) through a shortened summer break, and will further positively impact students by providing breaks at key points of the year and high interest

additional learning intersession opportunities. This should be evidenced by a number of student achievement measures, to include all state required assessments.

The Balanced Calendar will also transform the way time and instruction are thought about across the entire school year. Additionally, the breaks will provide teachers with a greater opportunity to be at their best and enhance teacher efficacy, spurring even more success for students. Teachers will be required to take a minimum of one week off during each intersession, guaranteeing at least a small break between each grading period. The benefit of these routine breaks after each marking period cannot be underestimated for Hopewell's teachers. When they are rested, reenergized, relaxed, and rejuvenated, they will be more effective in their classrooms. Hopewell anticipates a tremendous impact on student engagement and the quality of classroom instruction as a result of this change and opportunity for its teachers.

District leaders expect the benefits to be realized in numerous areas, including but not limited to: student achievement, student attendance, school culture survey data, teacher attendance, staff working conditions survey data, teacher morale, teacher retention, community perception of the schools, and more. This is not a small change but a monumental one and it is expected to impact nearly every part of the work.

Hopewell also anticipates additional positive outcomes not simply limited to the schools. Significant conversation and research locally has centered on potential positive impacts with the juvenile crime rate, relationships and partnerships with businesses and community organizations, and other aspects of quality of life for families and for the community as a whole. Hopewell is a small yet typical urban community that, simply put, needs HOPE. If this district can reignite a sense of hope for the city's children, changing the anticipated trajectory for most of its greatest human resource, this project could be absolutely transformational.

Content areas addressed:

While literacy will be a primary focus, every content area will become a part of this progress. This includes not only the core content areas but the arts, Career and Technical Education, Advanced Placement/Dual Enrollment, and aspects of social-emotional learning. Additionally, the Balanced Calendar will provide an opportunity to accelerate the movement of Hopewell City Public Schools toward deeper learning, which will greatly enhance student learning that aligns with the Virginia Profile of a Graduate.

Learning experiences during the intersession opportunities will be "chunked" in one-week camp type experiences. Students will be able to choose which of these experiences they want to attend (a maximum of three potentially per session) based upon their own areas of interest and motivation. Examples of intersession experiences being considered currently include: Career explorations, Community service, College

visits, Music, Drama, Art, STEAM & Athletic Camps, Travel, Projects specific to local problems in the community, Business internships, Workforce development training, Book studies, Camping, Fishing, Water activities/studies on the James River, Construction projects, Career Shadowing, Field Trips, Leadership, Entrepreneurship, Governmental issues, Social-emotional group programming, etc.

Teachers will choose an area of passion they would LOVE to teach their students. These experiences will be cataloged annually for students and families to review and select. A maximum student-to-teacher ratio will be established, generally of 12:1. Imbedded in the project experience will include opportunities for collaboration, reading, writing, critical thinking, problem solving, creativity, research, analysis, and a public presentation of learning.

Hopewell strongly believes that by aligning teacher passions with student high-interest experiences, enthusiasm, engagement, excitement, and achievement will be reignited for many of its disenfranchised and struggling current students.

Length of program:

The adjustment of the calendar will be for the entire year. The first day of the school year will begin in late July, with intersession weeks in the fall (2 weeks), spring (2 weeks), and summer (3 weeks). Thus, there will be a total of 7 intersession weeks, in addition to some time for breaks and teacher professional development built in. Hopewell believes that with the addition of 7 potential extra weeks of quality and meaningful instruction available to any and all of its students, positive outcomes are inevitable.

Dates of program:

The currently proposed dates are for the school year to run from July 24th to June 10th in 2020-2021, with extensive preparation and planning taking place during the 2019-2020 school year.

Time of day program will occur:

The intersessions are generally planned to mirror each school's existing start and stop times of the Hopewell standard school day; however, this is a minimum standard of six hours of instruction. Several creative intersession ideas include travel, overnight experiences, evening performances, etc. As a result, it is expected that the length of day will be flexible and varied. The intersessions are planned to run five days each week.

E. SCHOOL AND STUDENT DEMOGRAPHIC INFORMATION

Describe the selected population and discuss why they were selected. Include the number of students, reporting group(s), and grade level(s).

Hopewell's proposal is unique in that the system plans to go to the Balanced Calendar for the entire district, rather than for just one or several schools within the district. Hopewell intends to include and invite all students to participate in intersessions, while also having enhanced recruiting for those students for whom research suggests the greatest benefits. This specifically includes students who are Black and Hispanic and those who are economically disadvantaged. These students are among those whom the JLARC review identifies as having the greatest benefit of a year-round school. Hopewell will specifically target all students who are reading more than one year below grade level.

Hopewell is setting a goal and programming in its first year of implementation to serve a minimum of one third (1400) of all students, and one-half for the second year of implementation (2200), including representation from Pre-K-12th grade.

The current student membership for Hopewell is 4,372. These students have the following demographic characteristics: 63% Black, 32% White, 2% Hispanic, 2% American Indian, and 1% Asian.

The number of students per grade level is:

Grade	2018-2019
Pre-kindergarten	310
Kindergarten	349
Grade 1	341
Grade 2	304
Grade 3	325
Grade 4	305
Grade 5	347
Grade 6	323
Grade 7	316
Grade 8	292
Grade 9	307

Grade 10	316
Grade 11	280
Grade 12	257
Total Students	4,372

For reporting groups, the 2017-2018 SOL literacy pass rates by percentage were:

Reporting Group	Reading Passed	Writing Passed
Division-Wide	70	58
Black	64	51
White	80	71
Hispanic	75	60
Asian	58	<
American Indian	<	<
Economically Disadvantaged	66	57

Description of the community the school(s) serves:

Hopewell, Virginia is an historically-rooted urban enclave of the tri-cities of the Richmond metropolitan region. A fair number of the city's estimated 22,596 residents have lived in Hopewell since birth. However, transience plays a major part of life in the city, due to its accessible housing for low-income families and military families affiliated with neighboring Fort Lee Army Base. According to Data USA, Hopewell experiences a 21.2% rate of poverty, while the national average is 13.4%.

At its height, Hopewell was a leading manufacturing town, with industrial giant Honeywell standing as the key job base and economic engine for the city. The plant's presence served as the landing destination for the city's education pipeline, as it

employed generations of Hopewell families well into the late 1990s -- when the manufacturing industry became more computer driven and the business world became more global.

Since that time, Hopewell's job base and local city budget have been on a steady decline, with Hopewell enduring some of the state's highest unemployment rates. In March of 2018, unemployment was 5.40% for Hopewell while across the Commonwealth unemployment stood at 3.30%.

Hopewell City Public Schools is a high poverty district currently comprised of 63% Black students, 32% White students, 2% American Indian students, 2% Hispanic students and 1% Asian students. Until recently, the overall district-wide percentage of students eligible for free or reduced lunch was 82%. All students now receive free lunch through the Community Eligibility Provision.

F. GOAL, OBJECTIVES, STRATEGIES, METRICS, AND ASSESSMENT INSTRUMENTS

Use the space below to enter the Goal of the program and up to three Objectives with related strategies, metrics, and assessment instruments. If additional space is needed, please attach an appendix.

Overall goal for the program:

The goal of the program is to transform the overall value of education in Hopewell City Public Schools through Balanced Calendar 2020, including increased achievement and engagement of students, teachers, and the community.

Objective 1:

Within the 2020-2021 school year and subsequent years of the Balanced Calendar, the system will increase student achievement from the prior year by decreasing the failure rate by at least 10% in SOL-tested content areas.

Strategies:

Strategies, as they relate to Objective 1, include:

- Focused instruction in the core content areas during the 7 weeks of intersessions, utilizing data of student needs.
- Deeper learning and PBL-driven instruction during the intersessions to enhance learning.
- Pre-teaching key concepts and standards in the core content areas during the

- Decreasing the summer learning gap and using data that is still “fresh” from the prior year to save time at the beginning of the next school year for targeted instruction.

See the timeline section below for a more detailed list of strategies.

Metric:

HCPS will be measuring the division-level pass rates for each SOL content area, as shown on the VDOE School Quality Profile tool, to meet Objective 1.

Assessment instrument:

SOL tests will be used as the assessment instrument for Objective 1.

Objective 2:

Within the 2020-2021 school year, and subsequent years of the Balanced Calendar, we will increase student attendance from the prior year by decreasing the rate of chronic absenteeism by at least 10%.

Strategies:

Our strategies, as they relate to Objective 2, include:

- During intersessions, pre-teach content with a focus on traditionally challenging areas in order to boost confidence and preparedness of students before learning and being assessed per the regular schedule, and thereby increasing their positive outlook and interest in attending school.

Metric:

The rate of chronic absenteeism for the division, as shown on the VDOE School Quality Profile tool, will be used to determine whether we have met Objective 2.

Assessment instrument:

The chronic absenteeism rate will be used for evaluation and reporting of Objective 2, and pulls from the records collection of our division.

Objective 3:

Within the 2020-2021 school year, and subsequent years of the Balanced Calendar, we will increase the division-level average scores by at least 10% from the prior survey on the VDOE Student School Climate Survey for the areas of academic engagement, emotional engagement, and behavioral engagement.

Strategies:

Our strategies, as they relate to Objective 3, include:

- Deeper learning and PBL-driven instruction during the intersessions to enhance learning and engagement.
- Use of experiential opportunities and field trips during intersessions to add to the overall student experience and valuing of learning.
- Utilizing intersessions as a way to develop greater collaboration and sense of belonging of students to their school and to one another.

G. PROPOSED SCHOOL CALENDAR

On May 16, 2019, the Hopewell City Public Schools Board voted to endorse the concept of the Balanced Calendar, with an understanding that the specific calendar would be brought to them for final approval. The calendar concept they endorsed was for a calendar that would be modeled on the 45-15 approach, with the first day of school occurring approximately the last week of July. They further endorsed that the calendar would include a combination of intersession and break days that focus on deep and authentic learning and enhances academic skills.

The current version of our proposed calendar is attached. HCPS realizes that, before the calendar can be finalized and in place for the 2020-2021 school year, it has to be approved by the Board prior to submitting a waiver to the State Board of Education. HCPS anticipates that the requisite calendar would be presented to our School Board in early fall.

Proposed Calendar is Appendix A.

H. COLLABORATION

Describe the involvement of teachers, parents, the community, organizations, etc., in the development and implementation of the program.

When Superintendent Hackney joined Hopewell City Public Schools in the summer of 2015, one of her first actions was to convene a group of teachers and staff to identify the most pressing needs and opportunities for the school division. In this early conversation, one of the topics that was brought up by teachers was the idea of a different calendar that could afford more opportunities for students across the year.

In the summer of 2016, a group of teachers were convened for a week to study the concept of an extended year calendar for Hopewell. The result was a unanimous recommendation to pursue a 45-15 balanced calendar. Hopewell applied for, and received, a year-round schools planning grant from VDOE that has guided much of the development work of the last couple of years.

During the 2018-2019 school year, Dr. Hackney and a leadership team conducted over 30 community town halls and other meetings. A meeting was also held with Hopewell City Council on July 31, 2018. These meetings were designed to describe and get input and feedback on the concept of the balanced calendar. Simultaneously, there has been an ongoing series of focus groups with teachers to help guide the development of some of the specifics of what the balanced calendar could look like. There have also been meetings with specific stakeholder groups, such as local businesses (as the district considers internship opportunities) and child care providers.

In summary, there has been an incredibly inclusive and exhaustive process of involving students, staff, families, and community members throughout the development of the proposal. This culminated in the approval of the School Board of this proposal on May 16, 2019.

Since the May vote of approval by the School Board, our division continues the work of determining the many next steps to plan and launch the Balanced Calendar. Over 40 staff were part of the initial group planning the next steps, and there is now outreach being planned to families, students, community members, and other staff to join the implementation planning group.

Staff are currently in discussions with two local universities interested in coordinating a research study on this potentially transformational educational experience in Hopewell.

I. TIMELINE OF INITIATIVES AND TASKS

Provide a timeline of the implementation process that includes major initiatives and tasks.

Summer 2019

- Convene the Balanced Calendar coalition (a steering group of teachers and others) to develop a specific work plan with timelines around core areas, including:
 - Communication (with staff, families, and community)
 - Curriculum and assessment adjustments
 - Intersession course planning
 - Cross-district and cross-agency coordination (e.g. athletic schedules, utility work, court services collaboration around new dates, etc.)
 - Facilities and maintenance planning
 - Personnel/Human Resources (e.g. recruitment, evaluation timelines, determining who will teach intersessions, etc.)
- Discuss change in annual contract dates with vendors for software, etc.
- Develop updated proposal of the 2020-2021 calendar to bring to the school board for approval, pending state waiver
- Begin communications blitz to the community to dispel myths and ensure clear communication and understanding of the Balanced Calendar
- Visit other year-round schools with the coalition group
- Identify key stakeholders to add to the coalition group

Fall 2019

- Apply for waiver to the State Board of Education for the adjusted calendar and start date

Appendix E
Hopewell Deeper Learning Framework

Appendix F

Focus Group Participants Coded ID labels

Focus Group Participants	Community Leader Coded ID	Business Partner Coded ID
Community Leader Participant 1	CL1	
Community Leader Participant 2	CL2	
Community Leader Participant 3	CL3	
Community Leader Participant 4	CL4	
Community Leader Participant 5	CL5	
Community Leader Participant 6	CL6	
Business Partner Participant 7		BP1
Business Partner Participant 8		BP2
Business Partner Participant 9		BP3
Business Partner Participant 10		BP4
Business Partner Participant 11		BP5
Business Partner Participant 12		BP6
Business Partner Participant 13		BP7
Business Partner Participant 14		BP8
Business Partner Participant 15		BP9
Business Partner Participant 16		BP10

Appendix G

Focus Group Questions (Community Leaders)

1. What do you want from Hopewell City Public Schools?
2. How can the city of Hopewell most benefit from their schools' Balanced Calendar initiative?
3. What community issues do you hope the balanced calendar will impact?
 - a. Clarifying questions will likely be necessary regarding how they think these issues will be impacted
4. What outcomes from the HCPS balanced calendar initiative would be most beneficial to the City of Hopewell?
 - a. If answers are mostly student achievement... ask clarifying question on deeper learning and "soft skills"
 - b. If answers are mostly soft skills or broad community outcomes... ask clarifying questions on student achievement
5. In your opinion, what will make the HCPS balanced calendar initiative successful?
 - a. Clarifying question on whether it is worth continuing
6. Why did you choose to attend tonight's meeting?

Appendix H

Focus Group Questions (Business Partners)

- 1) As a business leader in Hopewell and as someone who is literally invested in the community, what do you want from Hopewell City Public Schools?
- 2) What skills do you expect a Hopewell City Public Schools student or graduate to have?
 - a) Potential clarifying question on whether or not you think schools are doing this now.
 - b) What specific skills needed to perform for your business do you expect potential employees to possess?
- 3) You may be aware that the HCPS balanced calendar initiative is seeking business and community partners to help provide work-based experiences, engaging student learning experiences, and other resources to ensure the initiative can be operated successfully. What can HCPS do that would make you more likely to invest your resources in the Hopewell Balanced Calendar initiative?
- 4) In your opinion, what will make the Balanced Calendar initiative successful beyond the short term?
- 5) What outcomes from the HCPS balanced calendar initiative would be most beneficial to your business or organization?
- 6) Why did you choose to participate in today's focus group (everyone should answer)

Appendix I

Survey

Hello: Thank you in advance for participating in the Hopewell City Public School Balanced Calendar community engagement survey. In this survey, HCPS parents will be asked to complete a survey that asks questions about the Balanced Calendar, communication, and educational outcomes. It will take approximately 7 minutes to complete the questionnaire. Your participation in this study is completely voluntary. However, it is very important for us to learn your opinions. Your survey responses will be strictly confidential and data from this research will be reported only in the aggregate. Your information will be coded and will remain confidential. If you have questions at any time about the survey or the procedures, you may contact Cleve Walton by email at waltonc2@myvcu.edu. Thank you very much for your time and support. Please start with the survey now by clicking on the Continue button below.

My student(s) attend the following school(s). Select all that apply.

1. Dupont Elementary
2. Harry E. James Elementary
3. Patrick Copeland Elementary
4. Carter G. Woodson Middle
5. Hopewell High

For how many years have you been a resident of Hopewell City?



Do you own a business that operates within Hopewell City?

- 1. Yes
- 2. No

Are you employed by Hopewell City Public Schools?

- 1. Yes
- 2. No

To what extent do you agree or disagree with the following statements?

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
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<p>I support the change to the Balanced Calendar.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p>I understand the Balanced Calendar initiative.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>











How important are the following indicators of school quality to you?

	Not at all important	Slightly important	Moderately important	Very important	Extremely important
Standardized Test Scores	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality of Classroom Instruction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
School Spirit and Morale	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Teacher Quality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Variety of Courses and Programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
School Recognitions and Accolades	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

How important are these aspects of the Balanced Calendar to you?

	Not at all important	Slightly important	Moderately important	Very important	Extremely important
Extra time and support for your student's course work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Academic learning opportunities beyond your student's courses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Workplace and vocational experiences outside of your student's courses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<p>More frequent breaks in the school calendar</p>					
<p>Organized activities for students during school breaks</p>					

What outcomes do you want for your student(s) in the Hopewell City Public School system beyond the traditional academic successes such as grades, test scores, and graduation?

Which communications methods are effective for HCPS to communicate updates regarding the progress of the Balanced Calendar Initiative to you?

1. Email
2. In Person Events
3. Mailed Newsletter
4. Phone Call
5. Social Media
6. Text message
7. Website

Which Social Media Accounts would you want HCPS to use for sharing Balanced Calendar updates?

1. Facebook
2. Instagram
3. Twitter
4. Other

Please rate your interest in hearing about the following outcomes of the Balanced Calendar.

	Very uninterested	Somewhat uninterested	Neutral	Somewhat interested	Very interested
Academic achievement data	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Participation data	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Testimonials from students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Testimonials from teachers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Testimonials from business and community partnerships	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Images and videos of intersessions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Opportunities for parent and community involvement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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To help ensure the validity of our survey results please provide your email address in the space below.

Your email will not be used for any purposes other than verifying that each person responds only once.