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## Designing an Evaluation Plan for Hopewell City Public Schools Balanced Calendar

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**Designing an Evaluation Plan for Hopewell City Public Schools' Balanced Calendar**

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Virginia Commonwealth University

Capstone Project in Partial Completion of Requirements for the Educational Doctorate

Dr. Kimberly M. Bridges

Spring 2022

## **Acknowledgments and Dedications**

Our team would like to thank our Capstone committee chair Dr. Kimberly Bridges. Thank you for your leadership, coaching, and feedback throughout our capstone process. We would also like to thank our committee members, Mr. Michael F. Bolling, Dr. Michael S. Flanigan, and Dr. Lacey Seaton. Your valued feedback supported us throughout our research process and allowed us to create a quality product for our partner. We also celebrate with our capstone teammates. Together we have grown as leaders, researchers, writers, presenters, and team members.

Finally, we would like to thank our partners, Hopewell City Public Schools, Dr. Melody Hackney, and Mr. Byron Davis. Thank you for trusting us to join in your bold innovation.

### **Joy Blosser**

I would like to thank my family for their unwavering support throughout the last three years in the VCU Ed.D. Leadership program. To my husband, Ryan, thank you for your encouragement, love, patience, and feedback as you proofread many of my papers. I definitely would not be where I am today without your support and encouragement to always pursue more than I ever dreamed of for myself. To my children, Kai Marley and Tamayo, thank you for your amazing patience during my many long meetings and endless hours working on assignments in the evenings and over weekends. You two are truly the best kids I could have ever hoped for. My wish is that you both will always pursue your dreams! Finally, I want to thank my mom and dad. This effort is for you both. Thank you for instilling in me the value of education. Your hard work, encouragement, and parenting, provided me the grit, tenacity, and support I needed to accomplish this goal.

### **Ellen Burnett**

Thank you to my family and friends, near and far, for your constant moral support. Mom, Dad, Jay, Jen, Abigail and Maggie: I appreciate your support and love. The knowledge that words of encouragement were only a phone call away brought much peace. Your support has not wavered despite the many challenges each of you has faced in these last three years. Frank, Emily, and Denelle: I could not have navigated this season of life without each of you. You have supported me through the really hard things we aren't meant to face alone. For that, and I am forever grateful. Claire, Lauren, Tom, and Jen: Your guidance in this leg of my journey has been a life saver. I hope I can return your kindness and pass it along.

### **Jeffrey Elmore**

First and foremost, I must thank my wife Ginger for her endless support, encouragement and patience through this journey. So much has happened and changed over the past three years and we've grown through it all. I'd be remiss not to mention our two dogs, Turbo and Sadie. They have indeed been emotional support partners. Treats galore! I wish my parents and Ginger's could be here to celebrate this accomplishment, but I know they have been with us throughout the adventure. To my sister Jennifer, thanks for all the morning phone calls. Finally, to all of my friends in the cycling and automotive communities, I'm coming back, I promise!

**Michael Smith**

I would like to dedicate my dissertation work to my family and many friends. My deepest gratitude is given to my wife, Jessica Smith, who saw me through my doctoral journey's brightest and darkest moments. She was my muse, my shoulder to cry on, my editor, and my built-in support system. When I could no longer walk, she carried me. I would also like to thank my children, Remy and Skylar Smith, for always keeping things light with smiles, hugs, and giggles. Many thanks go to my parents, Tom Smith and Suzanne Myers-Kmicek, who stood by me with unconditional love, as did my in-laws and stepparents. I also dedicate this dissertation to my friends and Governor's School family, who supported me. I always appreciated their insight and advice, especially Dr. Robert Lowerre and Dr. Lisa Williams. I am delighted to share this accomplishment with so many fantastic people that cheered me on throughout my doctoral research.

**Margot Zahner**

My deepest thanks to my family for all your support on this doctoral journey. To Maaxo, *sos mi amor, mi cómplice y todo*. Thank you for being my partner in adventure, inspiration and love. My dear Zach and Silas, you are Life's greatest gifts to me. I am ever grateful for your encouragement and the opportunity to learn alongside you. Mom and Dad, you model the joy of learning and growing every day. Thank you for teaching us to persevere and seek excellence, the importance of doing work that matters, and the power of faith. To my siblings and in-laws, many thanks for sharing your expertise, humor and love. My heartfelt gratitude also goes to my dear friends, colleagues and students who have buoyed me throughout this doctoral process. Finally, I offer gratitude to the Creator, who makes all things possible.

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## **Designing an Evaluation Plan for Hopewell City Public Schools Balanced Calendar**

### **CHAPTER I: Introduction**

Hopewell City Public Schools (HCPS) has set sail on a daring journey. Under the innovative leadership of Superintendent Dr. Melody Hackney, the K-12 division of approximately 4,300 students began the 2021-2022 academic year with a new year-round academic calendar. HCPS has been planning this division-wide shift for years. By redistributing the 180 days of instruction and adding enrichment weeks throughout the year, HCPS aims toward a new horizon. Eschewing the traditional agricultural calendar and remedial academic practices standard in high-poverty divisions, HCPS aims to increase student engagement and achievement while increasing teacher engagement. HCPS's goal for the balanced calendar with enrichment-focused intersessions is as simple as ambitious: *All children will be well in Hopewell.*

#### **Impetus for Change: Community & Division Challenges**

Located at the confluence of the James and Appomattox Rivers, 21 miles southeast of Virginia's capital of Richmond, the city of Hopewell has weathered cycles of booms and busts. Once a major strategic port and manufacturing hub, the city currently has a higher unemployment rate and lower median income than surrounding areas ("Economy in Hopewell, Virginia," n.d.; U.S. Census Bureau, 2021). Nationally, higher rates of racial segregation and concentrated poverty in schools often correlate with lower standardized test scores and lower educational opportunities than in more racially integrated and more affluent divisions (Educational Opportunity Project at Stanford University, 2021; Meckler, 2019). HCPS's results from Virginia's accountability system, measured by Standards of Learning (SOL) assessments, mirror this national trend. In HCPS, where 84% of students are economically disadvantaged and 75% identify as students of color, SOL standardized test scores, graduation rates, and attendance

rates lag below state averages (Virginia Association of School Superintendents [VASS], 2021; Virginia Department of Education [VDOE], n.d.).

According to VASS, when Dr. Hackney assumed the helm of HCPS, she inherited a division with low academic expectations, negative student attitudes toward school, stagnant SOL assessment scores, and only one fully accredited school (VASS, 2021). When she began her tenure as the interim superintendent in 2015, just one of the HCPS schools was accredited (Llovio, 2015); it had been five years since the division had achieved full accreditation for all of its schools (Gibson, 2018). In 2017, the division's five comprehensive K-12 schools failed to earn state accreditation. In that year, two Hopewell schools, Dupont Elementary School and Carter G. Woodson Middle School, received the designation *Partially Accredited: Reconstituted School* by the Virginia Department of Education. Partial accreditation indicates that these schools had not met the criteria for full accreditation for four consecutive years. Also, in 2017, a third HCPS elementary school, Harry E. James Elementary School, was denied accreditation altogether (Gibson, 2018). The division was required to implement corrective measures, including school governance restructuring, to improve student academic performance (Gibson, 2018). In 2018, the VDOE changed the metrics for school accreditation, which benefited HCPS. Under the VDOE's new accreditation system, some HCPS schools which had been unable to achieve the mark under the former evaluation system gained accreditation (Gibson, 2018). However, the situation was a significant challenge for the small division.

With an urgency to address these flagging metrics and the threat of increased state sanctions, Superintendent Hackney led the division in exploring ways to improve student outcomes. In 2019, after a years-long process involving participation by teachers, parents, community, and school division leaders, and with generous planning and implementation grants

from the VDOE, the Hopewell City Public Schools governing board made the bold decision to embrace a division-wide transition to a balanced calendar for 2020-2021 (Hopewell City School Board, 2019). Unfortunately, the COVID-19 pandemic delayed the initiative's start for a year.

HCPS opened its school doors for the 2021-2022 academic year to great fanfare on July 26, 2021, earlier than any traditional academic calendar division in the state. Virginia Governor Ralph Northam, first lady Pamela Northam, and numerous state education leaders traveled to Hopewell on an inaugural day to celebrate the opening of the first division-wide year-round calendar in the Commonwealth of Virginia (Atkinson, 2021b). At the opening ceremony, Governor Northam lauded the division's efforts, especially following a year of significant academic interruption due to COVID-19.

Everybody can agree that this has been a very challenging year for Virginia, especially our students...to have this opportunity for them to not only make up for lost time but to really get ahead and move into the future in a positive way, it's a great day for Hopewell (Atkinson, 2021b).

### **Assessing Achievement of Ambitious Goals**

In their year-round school grant application to the VDOE (Hackney, 2019-2022), HCPS stated that in the first year of the balanced calendar, they would decrease student SOL failures by 10%, decrease chronic absenteeism by 10%, and increase school climate scores by 10% (Baber et al., 2021). These summative evaluation metrics strive to capture student academic performance, motivation, and affective school experience. With these ambitious metrics, additional formative and summative metrics will be needed to capture the full impact of the balanced calendar over time. As Dr. Hackney stated in her interview with reporters before this pioneering school year:

I don't know that after the first year we'll have the kind of measurable outcomes that people used in assessing our success. But I'll tell you, *we're going to figure out how to measure student voice, student engagement, parents...some of those non-traditional things that really matter* [emphasis added] (Atkinson, 2021a).

With this statement, Dr. Hackney publicly established the need to find non-traditional and complementary ways of measuring the impact of the balanced calendar. Our capstone team is prepared to assist the division in creating an evaluation plan to enable HCPS to do just that.

### **Capstone Team's Engagement**

Mr. Byron Davis, Supervisor of Balanced Calendar Implementation and Director of Communications for HCPS, first solicited support from a Doctorate of Leadership (Ed.D.) Capstone team at Virginia Commonwealth University (VCU) before the anticipated first year of the balanced calendar. Mr. Davis requested the Capstone 2021 team's support with best-practice research for implementing the balanced calendar (HCPS, 2020). Although implementation of the balanced calendar was delayed for a year due to COVID-19, Capstone 2021 researched the history and logistics of balanced calendars. Capstone 2021's work included meeting with community stakeholders and offering recommendations for communicating and implementing the initiative in HCPS.

Before the start of the 2021-2022 school year, Mr. Davis requested assistance from a second VCU doctoral team, Capstone 2022, to help analyze the impact of the balanced calendar. Working closely with HCPS, our team, Capstone 2022, conducted a review of the existent scholarly and practitioner literature, reviewed division documents, and interacted closely with stakeholders through interviews and focus groups to create a comprehensive evaluation plan for HCPS's balanced calendar. This report details the work of Capstone 2022.

The introduction to this report includes the background research that led to HCPS's balanced calendar innovation and details the anticipated impacts of this change. Next, the introduction explores the headwinds experienced by HCPS during their adoption of this innovation amid a global pandemic. The introduction concludes with a description of our team's process to arrive at the focus for our response to HCPS's Request for Assistance (RFA): designing a comprehensive evaluation plan for the HCPS balanced calendar (HCPS, 2021a).

### **Hopewell City Public Schools' Journey to Division-Wide Year-Round Calendar**

Five years ago, when Dr. Hackney began leadership of the struggling school division, she focused the division's work on "what was being taught and how; keeping what was working and eliminating what was not; and creating success by providing students with new opportunities and experiences" (VASS, 2021). In addition, increasing enriching educational opportunities for all students through *deeper learning* (Mehta & Fine, 2019) has been a consistent area of focus for Dr. Hackney and the HCPS school board, as described in the HCPS Strategic Plan, 2017-2022. Throughout the half decade of her HCPS leadership, the division has increased opportunities for deeper learning by engaging students in authentic, real-world experiences (VASS, 2021).

The division's second area of emphasis has been building shared leadership and ownership for improvement (VASS, 2021). Early in her tenure, Dr. Hackney called together teacher-led teams to identify areas of needed growth and innovation in the division. One teacher-led focus group identified summer learning loss as a critical concern and offered a year-round calendar as a solution. HCPS began exploring the year-round calendar in the 2017-2018 academic year with support from a \$50,000 VDOE planning grant. After diligent planning and design work, in 2019, the division was awarded a \$1.5 million grant to implement a year-round calendar, which it calls a balanced calendar, over three years, originally slated to begin in the

2020-2021 school year. In 2020-2021, the division received a second \$1.5 million start-up grant (Atkinson, 2019; Bolling personal communication, October 2021, Hackney, 2019-2022).

### **Why a Balanced Calendar?**

Nationally, the popularity of this non-traditional calendar has waxed and waned over time. While the first year-round calendar of modern education was adopted in 1968, predecessors with extended schedules are documented back to 1904 (McGlynn, 2002). The reform was most popular in the United States after the 1983 publication of *A Nation at Risk*, with popularity tapering off with economic contractions related to the 2008 recession (Skinner, 2014).

In Virginia, year-round calendars reached their zenith in 2009, when 31 individual schools, primarily in larger urban divisions, utilized this novel distribution of school days (Joint Legislative Audit and Review Commission [JLARC], 2012). However, the year-round calendar lost favor in Virginia in the succeeding decade. By 2015, only 11 Virginia schools still utilized the model, and not one locality had adopted the model for the entire division (M. Williams, 2015). Schools and divisions that have abandoned the practice of year-round schools cite increased costs, difficulty with completing infrastructure improvements when schools are in use throughout the year, and challenges in operating schools with divergent calendars within a single division (Hanover Research, 2013). However, the pendulum of education reform may again be swinging in favor of year-round schooling, especially in the wake of the COVID-19 educational crisis.

In Virginia, a resurgence of interest in the year-round calendar has been propelled by the Virginia General Assembly (GA) and the VDOE. In 2012, the GA requested a JLARC report, *Review of Year-Round Schools*. The report found that year-round schools have a significant positive impact on those students furthest from opportunities in traditional public schools

(JLARC, 2012). Proponents of the balanced calendar state that the redistribution of days can help eliminate the experience of learning loss, often referred to as *summer slide*, that occurs with extended summer breaks (National Association for Year-Round Education, 2015). The benefit of year-round schooling has been most pronounced for economically disadvantaged students (Cooper et al., 2003; Dessoiff, 2011; JLARC, 2012).

Beginning in 2014, the VDOE, under the direction of the GA, has offered annual \$50,000 planning grants and implementation grants of up to \$400,000 per school per year for divisions interested in exploring extended learning time, including the year-round calendar innovation. In announcing another cycle of grants in May of 2020, Governor Northam stated, “Extended school year programs offer more engagement, more quality instruction, and more opportunities to succeed for students who require additional or individualized attention to meet the Commonwealth’s expectations for student performance” (Dulles Regional Chamber of Commerce, 2020).

### ***Balanced Calendar: Desired Impact on Students and Academic Achievement***

HCPS believes their balanced calendar, with its intersession model, will positively impact student learning and engagement. The HCPS balanced calendar plan is modeled after the most common single-track year-round school schedule, a “45-15” program. This means that students attend traditional school classes for 45 days and have two or three weeks between academic quarters. During the breaks, HCPS will run two weeks of intersession enrichment programming as 5- or 10-day courses. The intersession courses, designed and taught by HCPS teachers, provide opportunities for deeper learning for all students. During these courses, students delve into an area of interest, develop new skills, and learn in hands-on and creative ways. Through redistributing the days of the academic year, and by providing all students the opportunity to

participate in six additional weeks of enrichment-based instruction during intersession breaks, HCPS believes there will be positive “impacts on deficits in literacy [and] school accreditation” (HCPS, 2021a, p.1).

**Increased Instructional Time More Impactful for Some Students.** Although the research on the benefit of increased instructional time is inconclusive for students in the aggregate, several studies have found that increased instructional time for students, through models that extend the school day or provide programs during school breaks, has a positive impact on achievement for traditionally underserved students (Almus & Dogan, 2016; Jez & Wassmer, 2015; JLARC, 2012; McMillen, 2001; Yesil-Dagli, 2019).

In their regression analysis from a data set of 310 California elementary schools, Jez and Wassmer (2015) found that increased instructional time had a statistically significant and positive impact on academic achievement for disadvantaged students. Their study focused on the effect that differences in total instructional time across those elementary schools had on standardized test performance. They concluded that 15 or more minutes of school a day (an additional week of instruction) correlated to an increase in the average overall academic achievement of about 1% and 1.5% for disadvantaged students. Similarly, Almus and Dogan (2016) found that summer school had an overall positive impact on students’ reading achievement in their mixed-methods study of 534 students in third through eighth grades. Students enrolled in this program participated in an additional five weeks of instruction, and their reading scores increased significantly on a post-test STAR reading assessment.

In 2012, JLARC found that Virginia student achievement improved at similar rates for the aggregate student in year-round schools as those in schools with a traditional calendar. However, the researchers discovered that Black, Latinx, English Learners, and economically

disadvantaged students in year-round schools improved their SOL test scores at a faster rate than their peers in schools following a traditional calendar (JLARC, 2012). This increase was attributed to the additional instructional time that was provided to students in year-round schools during intersessions. These findings are supported by two additional studies which found that increased instructional time had a positive impact on lower-achieving and economically disadvantaged students (McMillen, 2001; Yesil-Dagli, 2019). HCPS staff plan to provide “enhanced recruiting” efforts for Black, Latinx, and economically disadvantaged students to encourage them to attend the intersession courses (Hackney, 2019-2022).

**Importance of Instructional Quality.** Despite the good news about extended time leading to improved outcomes for those students least served in public schools, further research noted that simply increasing the amount of instructional time is not enough to ensure academic gains. Several studies have found that *how* the additional instructional time is used determines academic benefits (Checkoway et al., 2013; Hodges et al., 2017; Jez & Wassmer, 2015; JLARC, 2012; Yesil-Dagli, 2019). Researchers have concluded what most teachers can say with confidence: the quality of instruction is at least as important as how much instructional time students receive (Jez & Wassmer, 2015). As Long (2014) states, “simply increasing the length of the school year without focusing on the uses of time during the school day does not seem to increase achievement” (p. 381). As HCPS moves forward with the additional instructional time offered through intersessions, the research findings about the importance of quality instruction will be important to consider.

### ***Balanced Calendar: Desired Impact on Teachers***

In addition to benefiting students, HCPS believes the balanced calendar will help meet needs of their teaching faculty. In HCPS's VDOE grant application (Hackney, 2019-2022) and

the RFA to Capstone 2021 (HCPS, 2020), HCPS stated that one desired outcome of the balanced calendar is improved experiences for educators who may experience burnout in the traditional school calendar. Teacher burnout and attrition are a national concern, especially for school divisions with a high percentage of low-income students (Scott et al., 2019). This concern has been exacerbated by the multiple challenges and stresses of teaching during the COVID-19 pandemic. Teacher reports of their probability of leaving the profession within five years grew from 24% on average in March 2020 to 30% on average in March 2021 (Zamoro et al., 2021).

HCPS believes that offering distributed breaks from instruction throughout the year and providing opportunities for teachers to design instruction in areas of their passions will contribute to higher teacher engagement and retention for their division. Although teachers are only required to teach a minimum of one intersession course per year, they also have the opportunity to earn extra income by teaching additional intersession courses (B. Davis, personal communication, June 17, 2021). This design element addresses another often-cited concern of teachers: the lack of adequate remuneration.

Although the literature is limited on the impact of year-round calendars on educators, it supports HCPS's reasoning. A recent doctoral study interviewed Virginia teachers in a rural division utilizing a year-round calendar in some of its schools (Isom, 2020). Educators in the survey generally indicated positive feelings about how the year-round calendar in their division led to more balanced professional and personal lives. Further, teachers perceived that the balanced calendar led to better learning outcomes and greater engagement with school for their students (Isom, 2020).

## **HCPS's Plan to Develop Engaging and Enriching Intersessions**

HCPS leaders believe that the *secret sauce* of their balanced calendar is their enrichment-focused intersessions. HCPS intentionally designed intersession courses to focus on enrichment for all rather than on academic acceleration, intervention, or remediation. “We would like every student to be afforded the opportunity to attend intersession courses of their choice and interest” (HCPS, 2021a). Intersession courses do not have prerequisites for participation and are not aligned to the SOL curriculum taught during the academic year (HCPS, 2021b). Further, as a boon to busy families, unlike extracurricular activities outside of the school day, intersession courses will run on the same daily schedule as the traditional school day. During intersession, transportation and food services continue as usual for participating students. When attending intersession courses, students’ and families’ daily schedules and resources remain consistent during regular academic quarters and intersessions (B. Davis, personal communication, June 17, 2021).

HCPS's commitment to removing barriers for intersession participation aligns with the findings of Hodges et al. (2017): Academic achievement gaps can be decreased by providing experiences to students that are both challenging and engaging, and enrichment programs can improve student academic and social outcomes by preparing students for college and career choices, providing real-world apprenticeship opportunities, and building stronger self-concepts. By embracing an enrichment-focused design, HCPS is paddling upstream against the long-held practice of endless cycles of remediation, especially for students of color from high-poverty schools (Lambert & Sasonne, 2020; Love, 2019; TNTP, 2021). HCPS administrators seem to agree that with remediation, “students miss more and more grade-appropriate content in favor of

a review of content from previous grades and become increasingly less likely to ever make it back to grade-level mastery” (TNTP, 2021, p. 4).

### **Impact of COVID-19 on the Balanced Calendar Initiative**

With research-supported design elements, sufficient multi-year funding, and visionary leadership, HCPS was prepared to set sail on its balanced calendar journey in the fall of 2020. However, the global pandemic created a tidal wave of disruption to HCPS plans. Despite extensive planning, articulated desired impacts for stakeholders, and the development of a new calendar with intersessions, external factors intervened to delay the start of the balanced calendar initiative. The most significant obstacle to HCPS's voyage toward the balanced calendar has unquestionably been the COVID-19 pandemic. When the HCPS School Board approved the initiative in May of 2019, it was slated to begin in the 2020-2021 academic year. On March 13, 2020, just months prior to the anticipated July 2020 launch of the balanced calendar, Governor Northam declared a state of emergency and closed public schools in Virginia for two weeks. This closure was soon extended through the remainder of the 2019-2020 school year.

HCPS responded by offering remote learning for March through June of 2020. As late as April of 2020, HCPS remained committed to reopening for in-person learning on the scheduled first day of July 27, 2020, under the balanced calendar (Atkinson, 2020a). However, in June 2020, the school board made the difficult decision to postpone implementation of the balanced calendar initiative until the 2021-2022 academic year (Baber et al., 2021). For the majority of the 2020-2021 academic year, HCPS continued with distance learning, shifting in March 2021 to in-person instruction with social distancing and universal masking (Milby, 2020). At the end of the 2020-2021 academic year, despite some parents' calls to follow a traditional calendar and wait

for a more ‘normal year,’ HCPS proceeded with full implementation of the balanced calendar (Baber et al., 2021), starting the 2021-2022 academic year on July 26, 2021.

### ***Ongoing Pandemic Impact in the 2021-2022 School Year***

Indeed, starting the balanced calendar innovation while a pandemic continued to plague the world was difficult. As HCPS opened in July 2021, they moved swiftly into the eye of the dynamic and debilitating COVID-19 storm. Unfortunately for the HCPS team, their bold innovation, which was years in the making, collided with the highly contagious Delta variant. As the first division to open in Virginia, they were the first to navigate the turbulent waters that all divisions would encounter weeks and months later. HCPS was the bellwether of what school districts could expect operating in-person during a pandemic.

One week before opening, HCPS declared that all students and staff would be required to wear masks to return to the classroom. At the time, the Governor and health officials left the decision to require the wearing of masks to divisions. The HCPS School Board faced fierce opposition to the mask mandate at their June 2021 meeting as some parents cursed the board, made offensive gestures, and accused the board of child abuse (NBC12 Newsroom, 2021). As HCPS was finishing the third week of school – more than two weeks before all schools would open – masks were mandated in Virginia’s K-12 schools (Natanson, 2021).

Despite their precautions, HCPS had 15 confirmed cases of COVID-19 among its students and staff within a week of opening; most of the cases were suspected to be from community spread (Bolster, 2021). On August 20, 2021, Hopewell was forced to cancel all classes for a day because of staffing shortages related to five confirmed staff cases of COVID-19, quarantines, and routine sick leave requests (Bondurant, 2021). Demand for virtual school increased, requiring reallocation of resources from in-person learning to virtual (Bolster, 2021).

### ***COVID's Challenge to Evaluating the HCPS Balanced Calendar***

The external influence of COVID-19 continued to pose serious challenges to HCPS's ability to effectively implement the first year of their balanced calendar initiative. HCPS's goals for the balanced calendar as outlined in the VDOE grant application would be ambitious for the division under normal circumstances, but during a global pandemic, they may prove unachievable. One may wonder how the division will achieve a 10% increase in attendance, a 10% decrease in SOL testing failure rates, and higher ratings on school climate surveys during the third year of the pandemic? Even establishing a baseline for comparison with the 2021-2022 data will be challenging. The influence of health concerns and crises associated with COVID-19 should not be underestimated when evaluating the first year of the balanced calendar initiative in HCPS.

### **Additional and Related Challenges to Implementation: Communication and Trust**

The impact of COVID-19 on HCPS's balanced calendar initiative was explored by Capstone 2021 during the 2020-2021 academic year. Through a process of document review, surveys, and focus groups, the previous team uncovered a number of additional and related challenges for HCPS. In focus groups and surveys conducted by Capstone 2021, HCPS parents and community partners highlighted a perceived lack of communication from the division. Stakeholders reported that communication was done well in the early phases of research and development of the balanced calendar but that this communication eroded once the pandemic caused the shutdown of HCPS in March of 2020 (Bondurant, 2021). Exacerbating this perceived lack of communication were the repeated delays of the start of a balanced calendar and the intersession program (Baber et al., 2021).

Survey respondents also indicated a limited understanding of the balanced calendar, with 39% of HCPS parent survey respondents disagreeing to some degree with the statement, “I understand the balanced calendar.” (Baber et al., 2021, p. 73). Capstone 2021 also found that the survey respondents in the parent population were split nearly evenly in their support of the balanced calendar: they found survey respondents were 1/3 positive, 1/3 neutral, and 1/3 negative. The team also found a significant relationship between those parents who reported that they did not understand the balanced calendar and those that did not support the initiative (Baber et al., 2021).

Capstone 2021 found that business partners and parents had a strong desire for a more normal year after the struggles of the 2020-2021 academic year. In the summer of 2021, American businesses focused on problems in supply chains, labor shortages, and rising inflation (Horsley, 2021). For HCPS, these types of concerns may have contributed to less-than anticipated local business support of the balanced calendar innovation. Mr. Davis confirmed in August 2021 that although business and community partners were interested in participating, teachers had already completed planning for their courses and there were no community or business-led intersessions planned for the first round of courses in October 2021 (B. Davis, personal communication, June 17, 2021).

Despite the desire for a normal school year in 2021-2022, the maiden voyage of the balanced calendar started as anything but normal. When the Delta variant hit Hopewell, the state, and the nation in August 2021, school and community connections of communication and trust became further frayed by debates on mandatory masking, vaccination status, and staffing shortages (Bondurant, 2021; NBC12 Newsroom, 2021). Community expectations came into sharp conflict with the realities of launching a major education initiative during a pandemic. It is

yet to be seen whether the implementation delay of 2020-2021 and the new challenges that continued to arise in 2021-2022 will have lasting impacts on the trusting relationship between HCPS and the Hopewell community.

Although HCPS faced significant external threats and internal challenges to the success of the balanced calendar, the leadership of HCPS projected optimism as they undertook this potentially perilous journey. Three months before the balanced calendar maiden voyage began, Dr. Hackney declared in a press conference, “What I care about is students being engaged and having fun and loving learning. The rest happens, it's going to happen automatically” (Atkinson, 2021a). Dr. Hackney’s sincere care for her students and commitment to providing students opportunities for educational enrichment is crystal clear.

### **Defining A Problem of Practice**

The Capstone 2022 team was prepared to assist HCPS as they sailed toward their ambitious goals for increased student learning and engagement. In the HCPS RFA (2021) to the Capstone 2022 team, Mr. Davis requested that Capstone 2022 “study the process, effects, and outcomes” of the HCPS balanced calendar and “provide a conclusive report” on the “findings and recommendations for continued and future success” (p. 2). After our team received the RFA, we began a months-long process of analyzing and defining an actionable problem of practice for our Capstone 2022 team. We carefully reviewed the RFA submitted by Mr. Davis on behalf of HCPS, the HCPS VDOE grant application, the Capstone 2021 documents, as well as hundreds of pages of documents shared by HCPS. Through this document review, we came to appreciate the complexity of the balanced calendar initiative. Key dates in the Capstone 2022 process are summarized in Appendix A.

Our team determined that the RFA’s request for “a conclusive report” (2021, p. 2) was not feasible within the timeline of our Capstone 2022 work. Further, authoring “a conclusive report” (2021, p. 2) seemed inadvisable in the first year of an initiative. Programs often note an implementation dip, when outcomes decrease “as one encounters an innovation that requires new skills and new understandings” (Fullan, 2001, p. 42). The influence of the global pandemic had already impacted the initiative through calls from families for increased virtual learning opportunities and a staffing shortage. Our team was puzzled over how to provide a useful investigation for the division in the time allotted for our capstone.

In addition, our team heard from Mr. Davis a sincere desire that the HCPS balanced calendar would become a model for practice in the Commonwealth and the United States. In personal communication and in the press, Mr. Davis described the balanced calendar as groundbreaking work that he anticipates will have far-reaching influence. As Mr. Davis talks, one imagines the balanced calendar with intersessions as a lighthouse illuminating a way forward for improvement for other divisions in the state and the nation. Mr. Davis said, “We’re really excited to share our work with the intersessions and balanced calendar. I think we can help a lot of divisions and people will be coming to see what we are doing here” (Byron Davis, personal communication, August 16, 2021).

As we spent the summer reviewing HCPS documents, HCPS web pages, and the previous capstone team’s work, we wondered together:

- What levers does HCPS believe will be activated through the balanced calendar and intersessions that will lead to increased student engagement and achievement?
- How will the external environment of this most challenging year impact this innovation?

- How will teachers and administrators interact with the new calendar and new intersession teaching responsibilities in the first year?
- What are the mechanisms for moving the deeper learning work planned for intersessions into the core academic instruction?
- Will enrichment opportunities for all students raise standardized test scores?
- What measures beyond test scores can help HCPS tell the story of the balanced calendar and intersessions to the community?
- How will the division communicate the initiative's successes to build parent and community support, even in these most trying times?

### **Using Improvement Science Tools**

Capstone 2022 used several improvement science tools to arrive at an actionable problem of practice for our work (Bryk et al., 2015; Perry et al., 2020). We first sought to gain an understanding of the underlying causes of the problem HCPS was proposing to solve through intersessions and the balanced calendar initiative. Our first tool was a *funnel analysis* (see Appendix B), also referred to as a “Conceptual Framework for Narrowing a Problem of Practice” (Perry et al., 2020).

A funnel analysis starts with the overarching problem, which we identified as students’ academic achievement and opportunity gaps. Through the balanced calendar, HCPS seeks to address what some have characterized as a *wicked problem*: raising student academic achievement and engagement. A *wicked problem* is one that is complex, multifaceted, and difficult to solve, in contrast to a *tame problem* that has sufficient protocols or scientific advances to solve (Rittel & Webber, 1973). The balanced calendar initiative started in a year whose global environment is characterized by significant degrees of volatility, complexity,

uncertainty, and ambiguity. Next, we attempted to narrow the focus to our understanding of HCPS's *wicked problem*. We determined that one of the wicked problems facing HCPS is students' lack of access to educational opportunities because of widespread poverty in the community. We further narrowed the scope to the local school division problems, which we identified as attendance issues, teacher burnout, lack of enrichment opportunities for students, and lack of engagement by students. Finally, we narrowed our scope to arrive at our first iteration of a focus for our capstone project: measuring the impact and success of intersession courses using multiple metrics beyond standardized test scores.

### ***The 5 Whys Protocol***

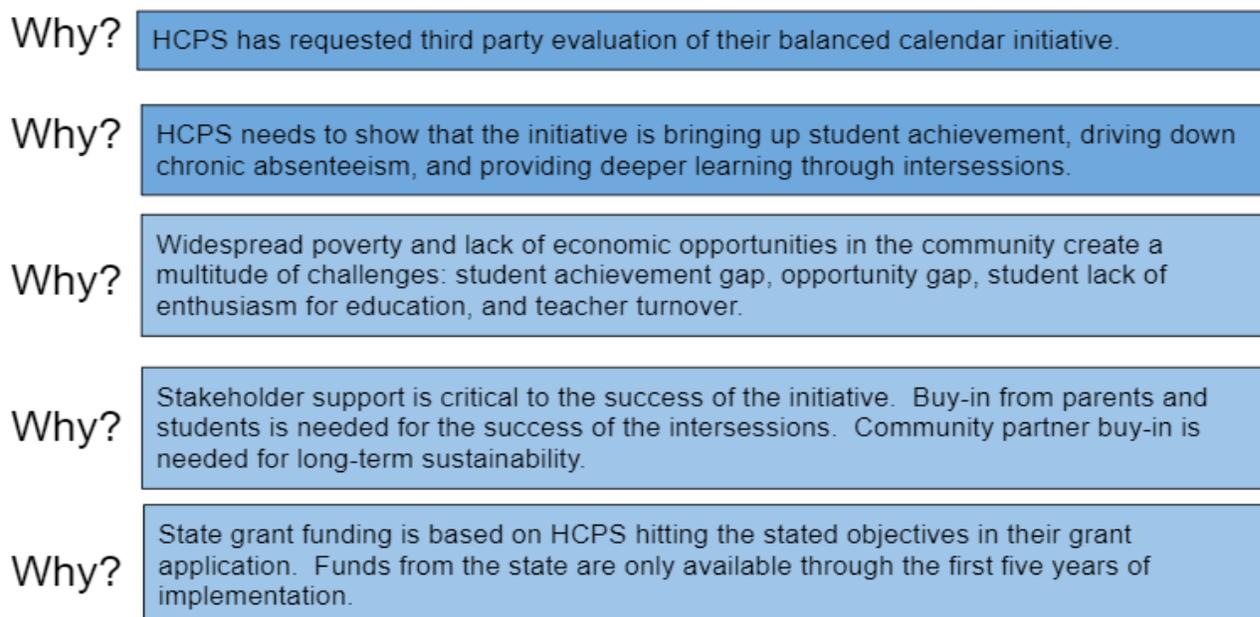
The next improvement science tool our team used was The 5 Whys protocol, a root cause analysis tool developed by Japanese industrialist and founder of Toyota motors, Sakichi Toyoda (Ohno, 2006). This iterative technique is designed to explore the cause-and-effect relationships underlying a specific problem by repeatedly asking “Why?”. The tool is used to arrive at an actionable problem of practice. When one can no longer ask “Why?”, one arrives at the focus of one’s work. Our team created several of these 5 Whys models. In our first iteration of our 5 Whys analysis (see Appendix C), we listed many of the same issues captured in the Funnel Analysis Diagram. Our last two lines of this 1.0 version of our 5 Whys were, “HCPS wants the balanced calendar to grow and improve to positively impact more students and families in the district.” Which we followed with our final focus question: How can HCPS structure and improve intersession courses so that all the children of HCPS can be well?

As our team reflected on this 1.0 version of our 5 Whys analysis, we realized that our narrow focus on evaluating intersessions would not achieve the goal requested by our partner in the RFA (2021) to “study the process, effects, and outcomes” of the HCPS balanced calendar and

“provide a conclusive report” on the “findings and recommendations for continued and future success” (p. 2). We repeated the 5 Whys process several times to arrive at a broader understanding of our partner’s needs. This broadened understanding led us to an actionable problem of practice for our Capstone 2022 team. Our thinking is represented in Figure 1, created in July of 2021.

### Figure 1

*Using the 5 Whys Protocol to Understand the Problem of Practice 4.0*



*Note:* This is the fourth 5 Why protocol produced by the Capstone 2022 team. It demonstrates an evolution of the team’s thinking.

In the fourth iteration of the 5 Whys protocol, we recognized the external authorizing environment of public support and VDOE funding needed to ensure the success of the balanced calendar initiative. With this acknowledgment, we broadened the focus of our problem of practice. We shifted from thinking about the evaluation of intersession courses to a more holistic approach of evaluating the balanced calendar initiative. We began the 4.0 version of the 5 Whys

analysis focused on HCPS's request for third-party evaluation of the balanced calendar initiative overall. As shown in Figure 1, our 5 Whys 4.0 analysis expanded our understanding of HCPS's pressure to demonstrate the success of the initiative. Specifically, in order to secure continued funding, whether from the state or the community, the division needs to demonstrate success. Further, to achieve their ambitious goals for the balanced calendar, the division needs to use evaluation to learn through this process of implementation. Evaluation data will help the division continuously improve its balanced calendar practices. Through these improvement science processes, Capstone 2022 determined our focus would be to provide HCPS with a comprehensive evaluation plan for the balanced calendar initiative to help address these varied needs.

### ***Theory of Change***

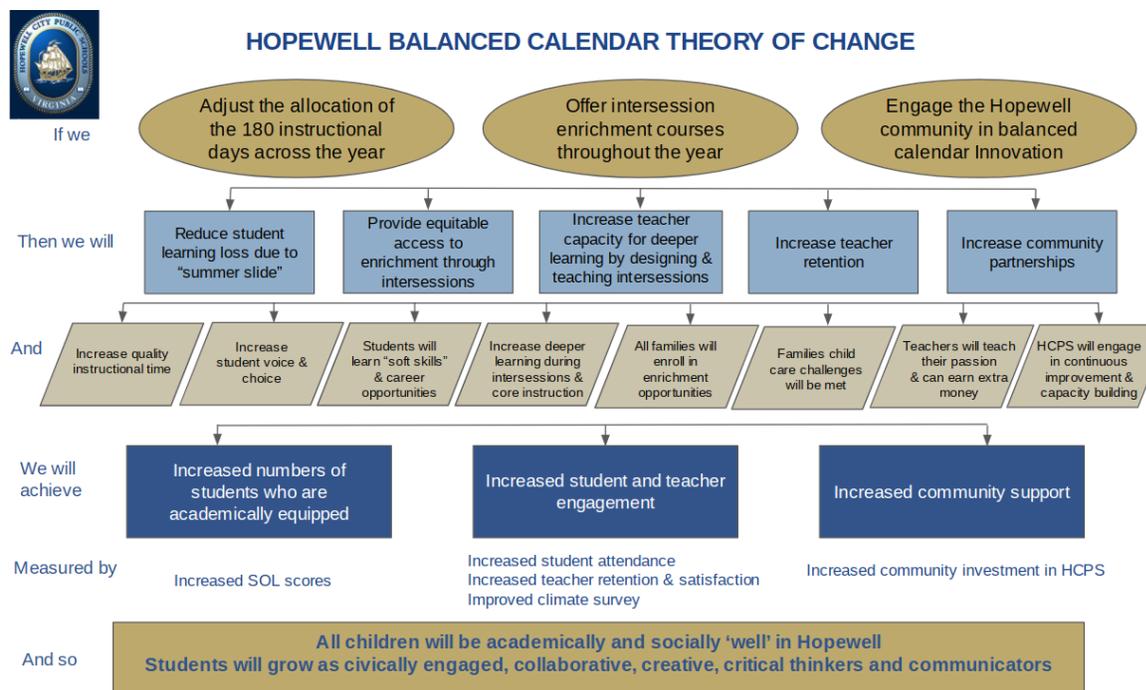
As we began to research evaluation plans, we used another vital improvement science tool used by organizations to design robust systems for evaluation: a theory of change (TOC). The research base for crafting a TOC is described in more detail in our literature review. In brief, a TOC is a diagram or if-then statement that explains *how* and *why* a change initiative will arrive at its anticipated goals. As we wrote to our partner to explain our process, “In improvement science, a TOC is a roadmap or flowchart of an organization’s expected outcomes in a change process. It helps to show the resources, relationships, and assumptions of an initiative” (M. Smith, personal communication, August 12, 2021).

Through the summer, our team collaborated to create a diagram of an HCPS balanced calendar TOC. We wanted to articulate in a single visual the diverse factors HCPS believes will contribute to positive outcomes through the balanced calendar initiative. We also endeavored to capture and reveal some of the implied assumptions in the HCPS balanced calendar plan. In late

July, Capstone 2022 met for a day-long retreat to collaboratively create our first iteration of HCPS TOC 1.0 (see Appendix D).

For the remainder of July 2021, we continued to revise this TOC 1.0 diagram as we consulted HCPS balanced calendar planning documents, HCPS public statements including their webpages, and Capstone 2021 documents. We consulted with our partner and read about the balanced calendar initiative in the press. The review of these documents revealed the evolution of the ideas and programming for the balanced calendar initiative. In the words of Mr. Davis, the development of the balanced calendar initiative has been “an organic and ongoing process” (B. Davis, personal communication, September 2, 2021).

After several revisions, our team requested a meeting to share the 2.0 version of the HCPS Balanced Calendar TOC. The document we shared with our partner in mid-August, 2021, is featured in Figure 2.

**Figure 2***HCPS Balanced Calendar Theory of Change 2.0*

Our partner reacted positively to the presentation of the TOC 2.0 and offered a few revisions. His revisions included incorporating an evaluation of the social-emotional impact of the balanced calendar. In a later communication, our partner shared that he had presented Capstone 2022's TOC 2.0 to Dr. Hackney and also incorporated the TOC into an HCPS School Board presentation (Davis, 2021).

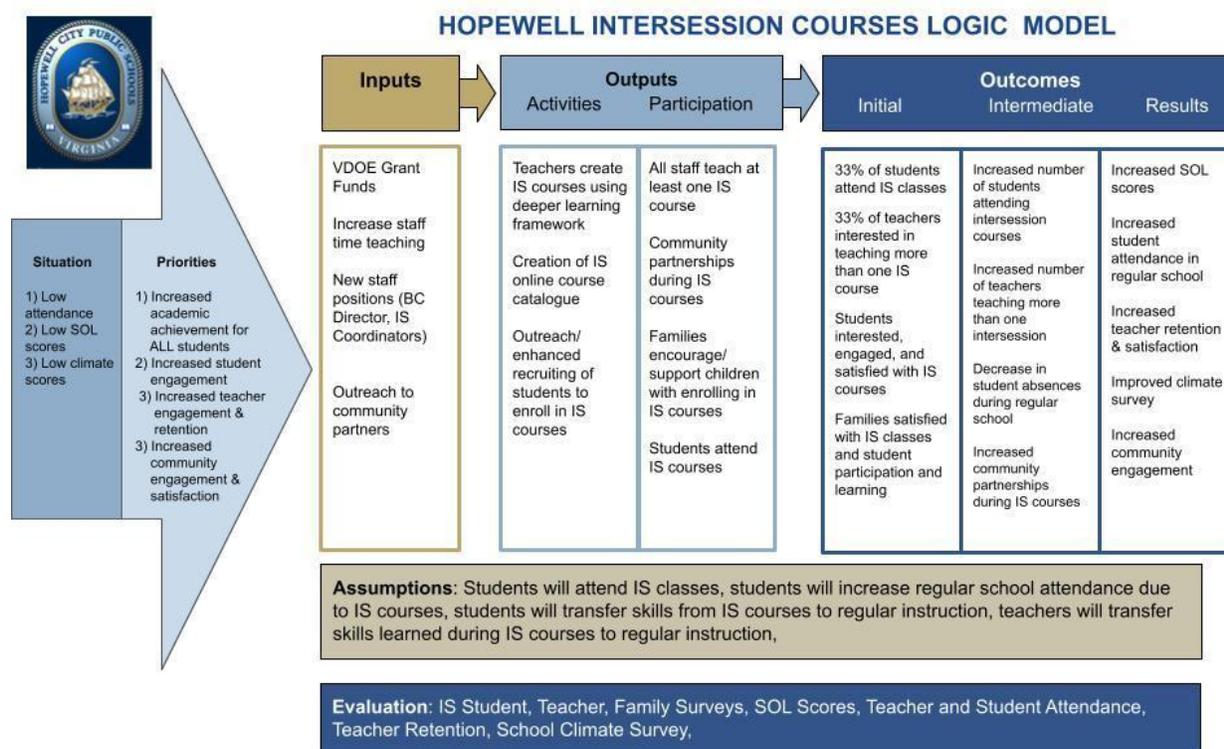
***Logic Model***

Related to, but more specific than a TOC, a logic model is another tool used to represent change mechanisms. As explained in more depth in our literature review chapter, a logic model depicts specific actions, inputs, and measurable outcomes of a specific program. In addition to drafting several versions of a TOC for the HCPS balanced calendar, our team also drafted a few logic models specific to HCPS intersessions. We wanted to explore the inputs and outputs of the

intersession courses, a unique aspect of the HCPS balanced calendar. We were also interested in visualizing how the impact of the intersession courses could be evaluated at three stages: initial implementation, intermediate stage, and final results. Figure 3 shows the logic model we presented to our partner in early September. (See Appendix F for the HCPS Balanced Calendar Logic Model 2.0)

**Figure 3**

*HCPS Intersession Logic Model 1.0*



Through the development of the TOC and logic model, and through several conversations with our partner, by late August, Capstone 2022 more clearly understood the roadmap HCPS envisioned for the balanced calendar initiative. As described in our methods chapter, our team continued to solicit feedback on the TOC and logic model from multiple stakeholders through interviews and focus groups. These data informed our evaluation plan for HCPS.

## **Prototyping Data Dashboards**

Concurrent to our work drafting a TOC for HCPS, our team explored the potential of interactive data dashboards to share evaluation results for the balanced calendar. Capstone 2022 wondered if a data dashboard could be an effective method to share evaluation data about the balanced calendar with internal stakeholders including teachers, administrators, and intersession coordinators, as well as with external stakeholders including Hopewell community members, potential funders, and area leaders.

From June through August, Capstone 2022 created two prototype data dashboards for the balanced calendar initiative of HCPS. Using Google Data Studio, the team created Prototype 1, a dashboard focused on intersessions using mock qualitative and quantitative data, and Prototype 2, a dashboard featuring data from standardized testing metrics intersecting with Career and Technical Education data and longitudinal data from postsecondary reports (see Appendix G). Figure 4 features the first page of Prototype 1, the six-page intersession-focused interactive data dashboard.

Figure 4

*Prototype 1: Intersession Interactive Data Dashboard*

*Note:* Image features the first page of one prototype data dashboard created by the Capstone 2022 team.

As we created the Prototype 1 and Prototype 2 dashboards, the team gained an understanding of the kinds of data that can be incorporated into this interactive medium. We also realized the importance of a strong and aligned design when surveying multiple audiences. For example, in Prototype 1, questions to parents and intersession participants were similar, but not precisely aligned; thus, the reporting of results was less parallel than we would have preferred. This was important learning as we consider creating an evaluation plan for HCPS. Furthermore, we recognized the importance of having adequate access to technology for the audience of a data

dashboard, including high-speed internet and a large screen device. Finally, we recognized that the dashboard would need to be shared in the language of the end-user.

When Capstone 2022 shared these prototype dashboards with our partner in early September, he stated he was “blown away” by the dashboard prototypes (Davis, 2021, personal communication, September 2, 2021). He indicated an interest in learning how to utilize Google Data Studio and a strong desire to learn more about the potential of these instruments to share evaluation results of the balanced calendar with internal and external stakeholders.

### **Crafting an Evaluation Plan**

Through our team’s iterative problem analysis work and multiple conversations with our partner, our team ultimately proposed that we design a comprehensive evaluation plan of the balanced calendar initiative for HCPS. We believe that by designing a comprehensive evaluation plan, we will support HCPS in collecting the data necessary to ensure continual improvement of their balanced calendar initiative and to build stakeholder support for the long-term success of the initiative. To that end, we determined a scope of work to address three primary questions.

### ***Research Questions***

Three research questions guided further work:

1. What are the essential components of a quality comprehensive evaluation plan for the HCPS balanced calendar initiative?
2. How can the balanced calendar evaluation plan drive improvement within the division?
3. How can HCPS use the evaluation plan to strengthen support for the balanced calendar initiative in the larger community?

In the following chapters, we provide an overview of the work to support the development of a comprehensive evaluation plan. In the next chapter, we share findings from

HCPS original source documents and the existing research and practitioner literature about designing and conducting effective program evaluations. Our third chapter explains the methods we used to conduct our analysis to determine the components and use of an evaluation plan for the HCPS balanced calendar. In the fourth chapter we share the findings from our research. In the fifth chapter, we offer recommendations for the HCPS balanced calendar evaluation plan. Appendix L includes the evaluation plan designed based on this effort. We hope that the process and products of the Capstone 2022 HCPS balanced calendar capstone, including a comprehensive evaluation plan, will prove to be a beneficial compass to HCPS as they venture further into waters unknown.

## **CHAPTER II: Literature Review Program Evaluation**

From its problem and context analysis, the Capstone 2022 team turned its focus towards a review of the literature on program evaluation. Our research inquiries included types of evaluation, components of program evaluation, best practices for aligning a TOC with a program evaluation, and challenges to program evaluation. Through our review of the scholarly literature, we determined the components necessary for HCPS to monitor and evaluate their balanced calendar initiative.

### **Why Evaluate?**

The purpose of an evaluation is to collect and analyze data or information about an initiative in order to make conclusions about its effectiveness, impact, and outcomes (Martin, 2015; Mirambeau et al., 2013; Nassar-McMillan & Conley, 2011; W. K. Kellogg Foundation, 2017). Evaluations seek to demonstrate the degree to which an initiative is working as intended and achieving the established goals and objectives (Martin, 2015). The process of evaluation also promotes learning, as it supports the identification of a program's strengths, weaknesses, and opportunities for growth (Martin, 2015; Nassar-McMillan & Conley, 2011; W. K. Kellogg Foundation, 2017).

An evaluation plan should outline the goals and purpose of evaluation, define pertinent evaluation questions, and identify information or data that will be captured. Additionally, the evaluation plan will help stakeholders understand the program's purpose, goals, and objectives; align program activities with intended outcomes; and develop a timeline prioritizing what to evaluate and when various evaluation steps should occur (Martin, 2015; Mirambeau et al., 2013).

### **How to Evaluate?**

Through review of current scholarly and practitioner literature, three models emerged that

offered the most complete information about how to develop and conduct an evaluation plan. These models are the United States Department of Education (USDOE, 2014) *Embedded Evaluation Model*, the United States Department of Health and Human Services (USDHHS, 1999) *Framework for Program Evaluation in Public Health*, and the W. K. Kellogg Foundation (2017) *Evaluation Process that Reflects Evaluative Thinking*. These models contain significant similarities including: ensuring stakeholder engagement, defining or describing the initiative or program through the use of a theory of change and/or logic model, developing and implementing the evaluation plan, and using the results to inform and improve the initiative. Each model also has unique components. Table 1 illustrates the similarities and differences among these three models.

**Table 1***Comparison of Three Evaluation Models*

United States Department of Education (2014) Embedded Evaluation Model	United States Department of Health and Human Services (1999) Framework for Program Evaluation in Public Health	W.K. Kellogg Foundation (2017) Evaluation Process That Reflects Evaluative Thinking
Step 1: Define the initiative or program with stakeholder input (Theory of change and logic model)	Step 1: Engage Stakeholders	Stage A: Prepare for conducting an evaluation (Determining the type and approach to the evaluation, and the evaluation methodology)
Step 2: Plan - Develop the evaluation questions, indicators, and identify the evaluation methods	Step 2: Describe the program (Logic model)	Stage B: Determine stakeholders and how and when to engage them
Step 3: Implement - Determine how the data should be collected, organized, and analyzed to answer each evaluation question	Step 3: Focus the evaluation design (purpose, evaluation questions and methods)	Stage C: Identify assumptions and determine what will be different (Theory of change and logic model)
Step 4: Interpret the results to determine if the initiative or program accomplished its goals	Step 4: Gather credible evidence (Identify data collection methods that will convey a well-rounded picture of the program)	Stage D: Develop an evaluation plan (Logic model, measurement framework, etc.)
Step 5: Inform & Refine - Use the results to improve the initiative or program	Step 5: Justify conclusions (on the basis of evidence which includes standards, analysis and synthesis, interpretation, judgment, and recommendations)	Stage E: Collect and analyze data
	Step 6: Ensure use and share lessons learned (Evaluation findings are used towards appropriate action and disseminated appropriately)	Stage F: Communicate results and understand what happened (Interpret findings and facilitate learning)

Capstone 2022 conducted a comparative analysis of these three evaluation models. We agreed on the components to include in a comprehensive evaluation plan. Table 2 provides an overview of these steps in our synthesized evaluation plan.

**Table 2**

*Synthesized Evaluation Plan Steps*

Step 1: Engage Stakeholders	Engage stakeholders throughout the process ensures an informed and iterative evaluation.
Step 2: Develop a Theory of Change and Logic Model	Develop a theory of change and logic model ensures clarity of the initiative and informs the design of the evaluation plan.
Step 3: Determine the Type of Evaluation	Determine the type of evaluation and data collection methods that will be used to collect the data in order to analyze and interpret the results of the evaluation.
Step 4: Generate Evaluation Questions	Articulate questions stakeholders believe the evaluation should answer.
Step 5: Identify Data Collection Methods	Identify data collection methods such as surveys, interviews or focus groups, observations, and tests or assessments used to measure each indicator and target.
Step 6: Analyze and Interpret the Results	Analyze and reflect on the data to determine what is working and/or not working, the progress towards the short-term, intermediate and long-term outcomes in order to improve the initiative.
Step 7: Engage in Improvement Cycles	Discuss evaluation results to inform the evaluation plan and begin the next cycle.

***Step 1: Engage Stakeholders***

Involving stakeholders from a diverse range of backgrounds ensures that multiple perspectives will be included throughout the evaluation process (Little, 2014; Mirambeau, et al.

2013; USDOE, 2014; USDHHS, 1999; W. K. Kellogg Foundation, 2017). The W. K. Kellogg Foundation (2017) explains that stakeholders are more likely to support the evaluation and respond to the results if they are involved in the evaluation process from the beginning stages. Additionally, when stakeholders are involved in the evaluation process from the beginning, they develop a vested interest in the success of the initiative, leading to improvements in whole-group decision making. Little (2014) stresses the importance of making sure the right stakeholders are involved in the evaluation process. When identifying stakeholders, it is important to consider individuals who have content knowledge of the initiative, who represent diverse perspectives and experiences, who are affected by the program (in the case of HCPS: administrators, teachers, students, families, etc.), and those who are responsible for decisions about the initiative's implementation and evaluation (Mirambeau et al. 2013; USDOE, 2014; USDHHS, 1999; W. K. Kellogg Foundation, 2017). Once the stakeholders are identified, they can help inform the other steps of the evaluation process.

### ***Step 2: Understand the Initiative***

To create a successful evaluation plan, clarity about the initiative and what it is trying to accomplish is critical (USDOE, 2014; USDHHS, 1999; W. K. Kellogg Foundation, 2017). The literature highlighted the importance of understanding the problem a new initiative is trying to address. This can be done through a variety of means such as a Fishbone Diagram, the 5 Whys, or a Driver Diagram (Bryk et al., 2015). These techniques are then used to identify an actionable problem of practice. These tools help the program evaluator accurately understand the root cause of systemic problems.

Stakeholder-engaged assessments allow an organization to assess the readiness of faculty and staff to address the problem of practice and help to create buy-in among stakeholders

(Courtney, 2020; Shakman et al., 2020; Yurkokofsky et al., 2020). Root cause analysis tools and stakeholder input provide the information necessary to develop a TOC for the initiative, which is a recommended practice during this stage of the evaluation process (Little, 2014; W. K. Kellogg Foundation, 2017; USDOE, 2014; USDHHS, 1999).

**Theory of Change.** A TOC is a narrative or visual representation of the theories for *how* and *why* an initiative works. The term, first published by Carol Weiss (1995) draws on three decades of research on theory-based evaluation. In theory-based evaluation, practitioners make their assumptions explicit through collaboratively constructing a flow chart or diagram of goals, assumptions, and measurements of a change initiative. Theories of change help organizers gain consensus about what they are trying to do and why. These conversations, often difficult and uncomfortable, help practitioners reach shared understandings. They also offer evaluators insight into the “leaps of faith” that program designers may be inadvertently building into their programs (Weiss, 1995, p. 72).

Creating a TOC is both a practical and essential part of a successful social transformation effort because it systematically articulates underlying assumptions of an organization's initiatives, demonstrating both *how* and *why* certain activities should bring about specific outcomes to ensure success (Brown, 2020; Clark & Anderson, 2004; Fullan, 2006; The Annie E. Casey Foundation, 2004; USDOE, 2019; W. K. Kellogg Foundation, 2017). The TOC guides the implementation and evaluation process by ensuring alignment to the intended outcomes. A clearly articulated TOC also ensures the steps are explicit to get from the action to the desired effect of that action. Organizations undertaking complex change can take many roads, but it is critical to select the paths most likely to get the organization to the desired destination.

*Using a Theory of Change to Build an Evaluation Plan.* Articulating a theory of change is especially important for building an evaluation of complex initiatives, such as the balanced calendar innovation at HCPS. By creating a TOC, “one understands immediately just how many and varied are the processes that may lead to an intervention’s success or failure” (Pawson, 2003, p. 483). Building an evaluation plan based on the TOC allows the evaluator and the program participants to clearly understand the complexity of factors influencing outcomes. A TOC is essential to designing effective evaluations of educational initiatives in order to “understand how an intervention works, consider who it will affect, and identify relevant outcomes” (USDOE, 2019, p. 1).

An evaluation plan based on a well-articulated TOC explicitly demonstrates whether the steps of intervention occurred as planned. However, the TOC is not just focused on inputs and outcomes, but more importantly on understanding the steps along the way. As Brown states, “Outcome assessment alone is inadequate for determining and replicating effective social-change strategies” (2020, p. 46).

In addition to making the steps to achieving outcomes visible, the TOC may also uncover the context of the intervention in evaluation (Blamey & MacKenzie, 2007). Theory-based evaluations “acknowledge that particular contexts can enhance or detract from program effectiveness and that such contexts may include factors that are within or outside the control of program implementers” (Blamey & MacKenzie, 2007, p. 441). A well-articulated TOC can make the underlying contextual factors influencing an initiative clear to stakeholders involved in implementation.

By highlighting the import and impact of these systemic factors into the foreground of a change initiative, a TOC-based evaluation can more accurately depict the mechanisms and

influences for change. The TOC not only facilitates understanding of the change initiative but it also is a powerful tool that can be used to communicate the design and program results to stakeholders (USDOE, 2014).

***Challenges of Theory of Change Evaluations.*** Building a TOC evaluation can be challenging as it is a collective and iterative process that requires significant time and investment by stakeholders (Blamey & MacKenzie, 2007). Productive iterative processes, central to the development of a TOC, require robust stakeholder input. Stakeholders must have the opportunity to articulate their understanding of what steps or actions must take place for goals to be met, as well as assumptions identified and addressed, and why (Clark & Anderson, 2004; Blamey & MacKenzie, 2007).

In an educational context, evaluations based on a TOC present some unique challenges. Michael Fullan (2006), suggests that a TOC that ignores hard questions about changing the culture of the school and division environment will always be incomplete. Fullan challenges educators to ask “How do we change cultures?” (2006, p. 4) when creating TOC models, or, he warns, they will face failure. Fullan further states that a TOC that does not address how the proposed innovation will impact classroom practice, the core work of an academic institution, will fail to deliver long-lasting results. Fullan (2006) offers the example of well-funded school change initiatives in Milwaukee, Chicago, and Seattle that ultimately failed to take hold because they did not have classroom-level practice tied to their TOC.

In *Reduce Change to Increase Improvement*, Robinson (2018) offers a counterpoint to change advocates. She suggests that rather than assume change will bring improvement in education, “We should do the opposite—that is, believe that change will not deliver improvement *unless there are structures and processes in place for ensuring that all involved*

[emphasis added] can learn how to turn the change into the intended improvement" (p. 5). Her emphasis on providing structural and procedural support in order for change initiatives to succeed is valuable to consider for the HCPS team implementing the balanced calendar.

Robinson (2018) describes the essential action of involving teachers in the process of developing change initiatives and in including teachers in the evaluation of change initiatives. Robinson (2018) states that initiatives with weak teacher and stakeholder buy-in result in teachers either complying with, but not embracing, the initiative or resisting the initiative altogether. On the other hand, when teachers have input through a dialogical process, both the teachers and leaders arrive at an agreed-upon course of action. When organizations successfully engage stakeholders in the process of creating a TOC and establishing an agreed-upon course of action, this work can be used to inform the development of a logic model.

**Logic Model.** Logic models and theories of change are linked, but they serve different purposes. Where a TOC seeks to link outcomes and activities, explaining how and why a desired change can be expected, a logic model uses a graphic to illustrate a program's components (Clark & Anderson, 2004). A logic model is developed from a TOC and is used to illustrate the relationships among the program resources, activities, outputs, and outcomes, including short-term, intermediate, and long-term outcomes of the initiative (Lawton et al., 2014; Little, 2014; Martin, 2015; W. K. Kellogg Foundation, 2017). The purpose of a logic model is to visually represent how the resources and activities planned will achieve the goals of the program or initiative (Little, 2014; Pennsylvania Coalition Against Rape [PCAR], 2018).

Logic models generally consist of the following components: inputs; outputs, including activities and participation; and outcomes/impacts (Lawton, 2014; Little, 2014; Martin, 2015; PCAR, 2018). The inputs are the investments needed to accomplish the program or initiative's

activities. These may include human, financial, and community resources as well as facilities and equipment. The outputs are the activities or what the program will do with the resources. It also includes participation, which refers to the population the activities will impact (PCAR, 2018). Finally, the outcomes or impacts are the short-term, intermediate, and long-term changes that will result from the implementation of the activities.

Both the TOC and logic model guide the implementation and evaluation process by ensuring the evaluation is aligned to the intended outcomes. In addition, the logic model supports stakeholders as they determine the type of evaluation to implement to measure their desired outcomes.

### ***Step 3: Determine the Type of Evaluations***

The type of evaluation must be aligned with the purpose of the program (W. K. Kellogg, 2017). When evaluation types are misaligned to a program's purpose, or timed inaccurately, the results may be misleading or counterproductive.

Although researchers use various terms to describe the different types of evaluation, there are essentially three main types: formative evaluation, performance monitoring, and summative evaluation (Martin, 2015; Nassar-McMillan & Conley, 2011; W. K. Kellogg Foundation, 2017). Each of these types has a unique purpose and timing throughout the implementation of the initiative.

The goal of a formative evaluation is to examine whether the initiative is being implemented as planned so the results can be used to inform adjustments necessary to improve the initiative. Formative assessments are administered during the early stages of the initiative (Martin, 2015; Nassar-McMillan & Conley, 2011; W. K. Kellogg Foundation, 2017). The overarching purpose of performance monitoring is to ensure accountability of the program

activities; it occurs during the initiative’s implementation (W. K. Kellogg Foundation, 2017). Summative evaluation examines whether the initiative is achieving the desired outcomes and objectives. Summative evaluations are completed after the initiative has been implemented for a period of time (Martin, 2015; Nassar-McMillan & Conley, 2011; W. K. Kellogg Foundation, 2017). Table 3 provides a comparison of each type of evaluation based on its purpose and timing.

**Table 3**

*Comparison of the Three Types of Evaluation*

Type of Evaluation	Purpose of Evaluation	Timing
Formative Evaluation	<ul style="list-style-type: none"> <li>• Examine whether the initiative is being implemented as planned</li> <li>• Identify strengths and weaknesses</li> </ul>	During the early stages of implementation
Performance Monitoring	<ul style="list-style-type: none"> <li>• Ensure accountability of the program activities</li> <li>• Monitor the progress towards the program’s goals</li> <li>• Provide information regarding potential problems</li> </ul>	Anytime throughout the initiative or program’s implementation
Summative Evaluation	<ul style="list-style-type: none"> <li>• Examines whether the initiative is achieving the desired outcomes and objectives</li> <li>• Assesses if the initiative is sustainable.</li> </ul>	When intermediate and long-term outcomes are expected, usually after the initiative has been implemented for a period of time.

*Note:* Adapted from “The Step-by-Step Guide to Evaluation: How to Become Savvy Evaluation Consumers” by W. K. Kellogg Foundation, 2017, p. 27 (<https://www.wkkf.org/resource-directory/resources/2017/11/the-step-by-step-guide-to-evaluation--how-to-become-savvy-evaluation-consumers>). Copyright 2017 by the W. K. Kellogg Foundation.

A comprehensive evaluation plan synthesizes each of the evaluation types into a single plan. Once the plan is completed, the next step is to generate the questions that the evaluation(s) will answer and create an evaluation matrix (W. K. Kellogg Foundation, 2017; USDOE, 2014).

#### ***Step 4: Generate Evaluation Questions***

The process of creating evaluation questions should encourage stakeholders to articulate what they believe the evaluation should answer (USDHHS, 1999). Evaluation questions should align to the type(s) of evaluation selected in the previous evaluation stage. Organizations should begin with questions that monitor the implementation of the initiative's activities and strategies (USDOE, 2014; W. K. Kellogg Foundation, 2017). The TOCs and logic models should guide stakeholders to create evaluation questions aligned to the activities and strategies. Questions that might be asked at this stage are:

- Has the strategy, initiative, or program been implemented as planned, and if not, why?
- What has worked or not worked and why?
- What needs to be improved and how? (W. K. Kellogg Foundation, 2017, p. 27).

The answers to these formative evaluation questions help to determine if the initiative is on track towards achieving long-term goals. The answers also provide an opportunity early in the initiative's implementation to identify issues or problems with the initiative in order to make adjustments before they become "critical impediments" to the success of the initiative (USDOE, 2014, p. 27).

After creating questions that evaluate the initiative's ability to be successful, the next set of questions should address the degree to which it is on track towards meeting short-term and intermediate objectives. Again, the TOC and logic model should inform evaluation questions for this stage. Stakeholders should begin with short-term objectives and then work towards

intermediate objectives. Evaluation questions may address more than one objective; some objectives may have more than one evaluation question (USDOE, 2014). However, each short and intermediate objective should have at least one evaluation question which investigates the extent to which the initiative is on track to achieve the desired outcomes or long-term goals (USDOE, 2014; W. K. Kellogg Foundation, 2017).

The final set of evaluation questions should focus on the initiative's long-term goals. Summative evaluation questions investigate if the initiative has achieved the desired outcomes and determine what factors made it effective or ineffective (USDOE, 2014; W. K. Kellogg Foundation, 2017). Evaluation questions at this stage should include:

- To what extent was the initiative successful?
- For whom and under what conditions does the initiative work best? (USDOE, 2014).

After drafting the evaluation questions for each stage of the evaluation (formative, performance monitoring, and summative) stakeholders may need to prioritize the evaluation questions based on available resources and the feasibility with which they can be answered. The next step in designing the evaluation process is to determine types of data to collect to answer each evaluation question.

#### ***Step 5: Identify Data Collection Methods***

Before deciding which data to collect it is best to create indicators. Indicators are general statements created from the evaluation questions that allow organizations to measure the progress of their initiative (USDOE, 2014; W. K. Kellogg Foundation, 2017). After indicators are developed, targets are created which provide a more specific and measurable marker of the progress towards the desired outcomes (USDOE, 2014). Targets specify exactly “how much

progress should be made and by when in order to determine to what extent goals and objectives have been met” (USDOE, 2014, p. 31).

The indicators and targets, along with the evaluation questions, will help determine the most appropriate data collection methods to use to measure each indicator and target. When selecting data collection methods, consider which methods will help answer the evaluation questions and provide the most reliable and valid data (USDOE, 2014; USDHHS, 1999; W. K. Kellogg Foundation, 2017). According to the US Department of Education (2014), “Reliability is the consistency with which the instrument assesses whatever it is assessing” while “validity is how well an instrument measures what it claims to measure” (p. 44-45).

Some common evaluation methods include surveys, interviews or focus groups, observations, and tests or assessments. Surveys are often used to collect information from a large number of people. When designing survey instruments, evaluators must ensure a quality survey instrument by following “specific procedures for designing surveys in which one can have confidence in the results” (Dillman, et al., 2014, p. 3). Instead of designing original surveys, some evaluators choose to use previously administered surveys with existing comparison data sets, which give the evaluator confidence that potential survey problems have already been addressed (USDOE, 2014). It is important to note that the same instrument can be valid for one population, such as monolingual English speakers, but not valid for another population, such as English language learners (USDOE, 2014).

Interviews and focus groups are generally used to collect information from a small group of people. Observations are used to collect information about participants’ behavior or interactions. Assessments and tests can be used to collect pre- and post-data to assess a program or initiative’s progress and results (Creswell & Poth, 2018; Kristiansen & Grønkjær, 2018;

USDOE, 2014). When a program is intended to improve academic performance or learning outcomes, it may be useful to use existing division or state level assessments to measure the change in student learning outcomes.

Once the evaluation questions, indicators, targets, and methods of data collection have been determined it is important to organize this information into a format that allows all stakeholders to get a clear picture of how to conduct the evaluation (USDOE, 2014; W. K. Kellogg Foundation, 2017). This can be accomplished with an evaluation framework or matrix.

**Using an Evaluation Framework.** An evaluation framework provides a structure to organize the components of the evaluation plan into an accessible format. The creation of the framework also provides another opportunity for stakeholders to actively participate in the evaluation plan, enhancing their overall understanding of the initiative. The evaluation framework represents the outcomes from the TOC and logic model, evaluation questions, indicators, targets, data collection methods, data sources, and data collection frequency (USDOE, 2014; W. K. Kellogg Foundation, 2017). Data is collected from a range of sources (Mirambeau, et al. 2013; W. K. Kellogg Foundation, 2017). Examples of data sources include clearinghouses; such as national, state, or local databases; and people; such as program participants, parents of program participants, or program administrators. Lastly, the data collection frequency determines how often data will be collected. Data could be collected on a monthly, quarterly, or yearly basis, or collection could be based on a specific number of occurrences scheduled throughout the initiative's implementation (W. K. Kellogg Foundation, 2017). Figure 5 provides an example evaluation framework template that includes each component.

**Figure 5***Evaluation Framework Template*

<b>Outcomes</b>	<b>Evaluation Question(s)</b>	<b>Indicators</b>	<b>Targets</b>	<b>Data Collection Methods</b>	<b>Data Sources</b>	<b>Data Collection Frequency</b>

*Note:* Adapted from “Evaluation Matters: Getting the Information You Need From Your Evaluation. A guide for educators to build evaluation into program planning and decision making using a theory-driven, embedded approach to evaluation.” by USDOE, 2014, p. 33 (<https://www2.ed.gov/about/offices/list/oese/sst/evaluationmatters.pdf>) and “The Step-by-Step Guide to Evaluation: How to Become Savvy Evaluation Consumers” by W. K. Kellogg Foundation, 2017, p. 27 (<https://www.wkkf.org/resource-directory/resources/2017/11/the-step-by-step-guide-to-evaluation--how-to-become-savvy-evaluation-consumers>). Copyright 2017 by the W. K. Kellogg Foundation.

Once the evaluation framework is complete, the team will be ready to collect and analyze data.

***Step 6: Analyze and Interpret Evaluation Results***

It is important to analyze data from evaluation results throughout the initiative’s implementation. For example, in the early implementation stages of the change initiative, stakeholders should examine the data to determine if the strategies and activities are being implemented as they were outlined in the TOC and logic model. This data is used to “reflect on what is working, what is not working, and discuss lessons learned from early implementation” (Little, 2014, p. 126). The lessons gleaned from early implementation results are used to refine the TOC and logic model. Organizations also should monitor their initiative to determine if the

services and activities they are implementing are reaching the intended target populations (Little, 2014). Monitoring involves collecting information on the outputs listed in the logic model.

A clearly articulated process for ongoing review, reflection, and adaptation is a critical component of an evaluation plan. If overlooked, misalignment can occur between what the initiative set out to do and what it is measuring (Little, 2014). During later stages of the evaluation plan, stakeholders analyze evidence related to the initiative's impact on the desired short-term, intermediate, and long-term outcomes. The results of the data collected during this stage can be used to determine the sustainability of the initiative as well as drive the continuous cycle of improvement (Little, 2014).

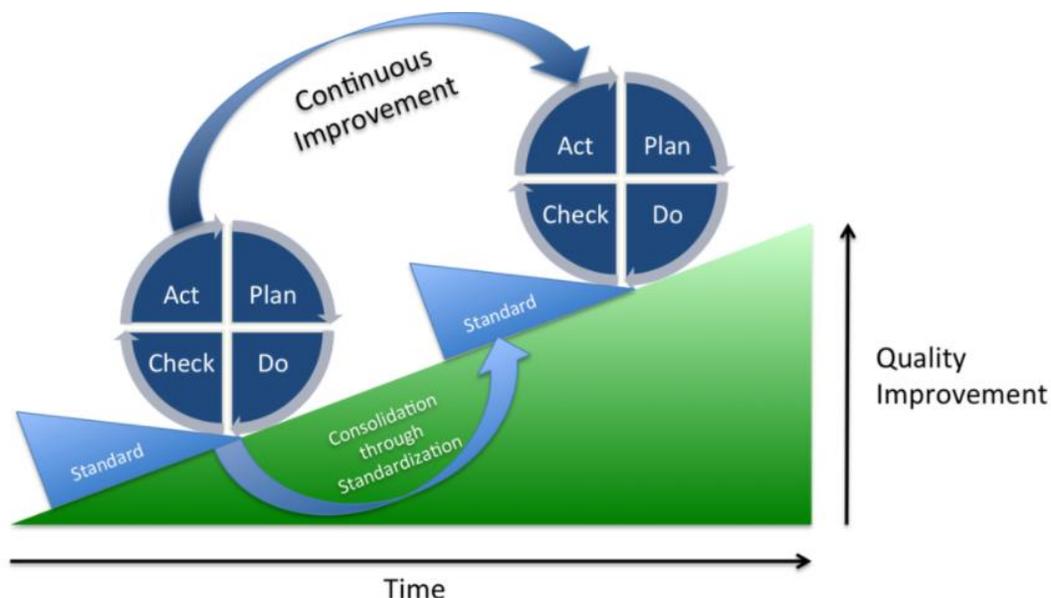
#### ***Step 7: Engage in Improvement Cycles***

Improvement cycles describe how continuous improvement effectively supports short- and long-term goals. They also help to ensure that stakeholders possess a deep understanding of how and why data is collected and analyzed by connecting data and analysis to the next steps. Following analysis of the data, results are discussed to inform the evaluation plan and create new improvement cycles. This can then ensure that the data yielded aligns with the goals of the organization and the strategies being implemented (Arnold, 2011; Courtney, 2020; Foord & Haar, 2012).

There are two common approaches to improvement cycles. The most frequently cited is the *Deming Cycle*, more commonly known as Plan-Do-Check-Act (PDCA). In PDCA, program organizers experiment in creating and implementing initiatives, data is gathered, and adjustments are made (Shakman et al., 2020; Tichnor-Wagner et al., 2017). Figure 6 shows a visual representation of the *Deming Cycle*.

**Figure 6**

*Visual representation of the Deming Cycle*



Note: Graphic from Shakman et al. (2020). PDCA in Quality Improvement over Time.

PDCA cycles for academic instruction typically rely on teams of teachers with common planning time meeting regularly to discuss teaching resources, strategies, and methods. These work-groups are commonly referred to as Professional Learning Communities (PLCs). PLCs are a strategic locus of continuous improvement in schools because they assist in the onboarding of new teachers, create group accountability, and offer new ideas to veteran teachers (Arnold, 2011; Courtney, 2020). Building-level administration often provides oversight and then funnels information to the central office. Occasionally, these cycles are initiated top-down, but PDCA is typically carried out bottom-up.

The second approach to improvement cycles is the *Kaizen Model*. The *Kaizen Model* focuses on small, incremental improvements that are combined together, creating progress towards an overall goal. Data analysis is then used to simplify and stabilize the process of an initiative. Once a challenge is dealt with, personnel moves on to the next problem without pause

(Arnold, 2011; Shakman et al., 2020). Again this is usually supervised by lead teachers or building level administration, with reports to be provided to the division level. *Kaizen Models* almost always occur at the grassroots level. The literature reveals that only through reciprocal relationships can an organization truly engage in sustainable continuous improvement (Courtney, 2020; Foord & Haar, 2012; Kanold, 2006).

### **Communicating Evaluation Results**

High-quality evaluation is not complete or sustainable unless it is communicated effectively to the organization's stakeholders and the community. Well-executed evaluation plans lose impact when communication of the ongoing and resulting data from the program initiative is not prioritized (Rickinson, 2017). Although findings of an evaluation plan may be relevant and actionable for audiences beyond educators themselves, this work is often only accessible to people with membership in specialized education organizations or subscriptions to field-specific publications (Willinsky, 2013). When evaluation findings are not communicated effectively, successful initiatives in educational improvement often go unnoticed, are misunderstood, or misrepresented (Cottingham, 2020; Mirambeau et al., 2013; Rickinson, 2017; Willinsky, 2013; W. K. Kellogg, 2017; Yurkokofsky et al., 2020).

Publications such as Chapter 48 in the *SAGE Handbook of Educational Research* (Rickinson, 2017) and the W. K. Kellogg Foundation's *The Step-by-Step Guide to Evaluation: How to Become Savvy Evaluation Consumers* (2017) detail several well-established principles for effective communication of evaluation findings. First and foremost, the communication plan needs to be an integral component of the overall evaluation plan, and not an "end-on add-on" external to the evaluation itself. Rickinson (2016) adds that considering how to share the findings or progress of an evaluation with various consumers should be done throughout the evaluation

process. He emphasized the importance of the evaluation team experimenting with various communication methods during the process, laying the groundwork for a purposeful, effective communication stage as the evaluation's final component.

### *Audiences or User Types*

Those conducting the evaluation must recognize their audiences and consider how different consumers will utilize the findings (Cottingham, 2020; Mirambeau et al., 2013; Rickinson, 2016; W. K. Kellogg, 2017). Typically, there are three audience types: instrumental users, conceptual users, and strategic users (Rickinson, 2016). Instrumental users are those who will apply research findings in a concrete manner. In educational settings, examples of instrumental users are teachers and other school staff, who may adjust their practice based on the evaluation findings or administrators who use the findings to inform educational programming. Conceptual users are those who may not have a direct application of the findings but could adjust their perspectives and deepen their understanding about educational actions based on the new information. This group includes families of students and others who support educational activities, such as community members. Strategic users are those who leverage an evaluation's findings to influence policy or political action. Politicians, state officials, and local school board members are all strategic users (Rickinson, 2016). Each group represents differing needs and approaches regarding how research findings or evaluation outcomes should be communicated. Table 4 provides a comparison of the three different user groups.

**Table 4***Comparison of the 3 Different User Groups*

	Instrumental Users	Conceptual Users	Strategic Users
Interests	Apply findings Concrete uses Measurable outcomes Practical alignment Insiders	Indirect application/ interest Outsiders	Power and influence Optics Policy decisions
Examples	Teachers Administrators Instructional Support Staff	Families of Students Communities	Politicians School Board Members

*Note:* Adapted from Rickinson, M. (2016) ‘Communicating research findings’, In: D. Wyse, E.

Smith, L. E. Suter and N. Selwyn (Eds) *The BERA/Sage Handbook Of Educational Research*.

London: Sage, p. 9,

([https://www.researchgate.net/publication/301678653\\_Communicating\\_Research\\_Findings](https://www.researchgate.net/publication/301678653_Communicating_Research_Findings)).

Effective communication plans take the needs of these different audiences into consideration and describe how a study’s findings can best be communicated for each group. While instrumental and strategic users can be expected to have some familiarity with the context, purpose, and detail in an educational program’s evaluation plan, the evaluation team cannot assume the same for families and the public. When planning the communication component for conceptual users, the evaluation team must consider indicators of authentic family engagement, the presence of poverty and related barriers, home circumstances, and school context (Posey-Maddox & Haley-Lock, 2016). The Policy Analysis for California Education (PACE) suggests three principles that must be in place for educators to effectively communicate with families and the public (Cottingham, 2020):

1. Make data easily accessible so that parents and other stakeholders can engage with the information-sharing process.
2. Structure data sharing so parents start with a broad view that can then be focused to better understand information relevant to their child(ren).
3. Include parents in consistent and transparent data-sharing conversations to build relational trust, improve data literacy, and utilize parents' abilities to share and process information with peers. (p. 2)

Adherence to these principles will help to avoid unnecessary confusion as parents seek to engage with evaluation data connected to their children's scholastic experience.

### ***Engagement***

Communication of evaluation data should not be viewed as a simple transfer of information from the evaluator to the consumer. Instead, communication needs to be treated as an active learning process engaging all parties (Nadj et al., 2020; Rickinson, 2016; W. K. Kellogg Foundation, 2017). For instrumental users such as teachers and education professionals, active engagement with findings or outcomes evolves into professional learning activities that will impact classroom practice (Cordingley, 2004). Active engagement may include the use of technology tools such as web-based interactive data dashboards.

**Interactive Data Dashboards.** Interactive dashboards, as opposed to static dashboards, allow users to engage with information by applying filters or "drilling down" to data relevant to their specific needs and interests regarding the research (Nadj et al., 2020). This functionality has been recognized as effective scaffolding for conceptual users such as families and the general public (Cottingham, 2020). By prioritizing general data to be shared, divisions and schools enable conceptual users to dive deeper into both the data and the story it tells. Data manipulation

via a dashboard requires critical thinking and decision-making absent in static settings. This level of human involvement has been shown to better support users' understanding of complex data as opposed to merely viewing static displays (Nadj et al., 2020). In turn, because users of interactive dashboards experience higher levels of data comprehension, they also possess greater situational awareness about their environments. This enhanced awareness can lead to improved decision-making and task performance among people in all user groups (Nadj et al., 2020). When parents and teachers can make more informed decisions, students' learning experiences will be improved.

***Designing Data Dashboards.*** To be most effective, communication surrounding evaluation should follow research-based design practices. These practices address both the graphic elements within the dashboard and the language authors use to communicate the message.

Details such as the design, layout, and functionality of data presentations have a significant effect on an audience's ability to actively engage with the data story. Graphic displays should avoid clutter, employ elements appropriate to their purpose, and maintain consistency in the design theme (Williams, 2015; W. K. Kellogg Foundation, 2017). One approach to achieving an effective design theme is through a Human-Centered Design approach (HCD). HCD is based on theories of learning cognition, taking into consideration how a message aligns with cognitive load, attention span, human perception, and the audience's data literacy (Ahn et al., 2019). "Effective data visualization leads to clear conversations that support efficient decision making" (Evergreen, 2020, p. 9). The functionality available within the dashboard should reflect both the context of the research and the interests of targeted user groups (Ahn et al., 2019). For example, a teacher should easily distinguish between filters designed to provide teacher-centered

information and those designed for other types of user groups. For parents, Cottingham (2020) suggests that scaffolds be in place to help navigate the dashboard's functionality. These scaffolds describe how parents can move from overall program data to the data most applicable to their own children. At the most basic design level, effective data dashboard communication begins with adherence to color contrast, repetition of shapes, alignment of content, and proximity among related objects as described by Robin Williams in the *Non-Designer's Design Book*, 4<sup>th</sup> ed. (2015).

Finally, the language and mechanics used to communicate the evaluation data should reflect purposeful considerations and choices. Messages need to maintain focus and be written using clear, understandable language. This diction should be appropriate to the targeted user groups. Technical terms may be incorporated when necessary, but they should be applied in a manner consistent with the research itself (American Psychological Association [APA], 2020). As well, attention to APA conventions of grammar and mechanics will maintain a standard of professionalism throughout all written communications.

By synthesizing key components of, and considerations for, evaluation plans, Capstone 2022 determined the steps it would use in its evaluation plan for HCPS. Next, the team determined the areas of inquiry for stakeholder input that could help shape that plan.

## CHAPTER III: Methods

In this chapter, we share our research methodology for collecting data to inform the development of an evaluation plan for the HCPS balanced calendar initiative. Our mixed-methods research approach, *concurrent triangulation design* (Anderson, 2021a; Anderson, 2021b; Creswell, 2014), involved an iterative and parallel process of analyzing both qualitative and quantitative data. Our team conducted qualitative data analysis of interviews and focus groups, and engaged in a secondary analysis of survey data collected by the Capstone 2021 team. In addition, we conducted a document analysis through a thorough review of documents related to the HCPS balanced calendar initiative. Although we analyzed the qualitative and quantitative data separately, we used results from both streams of research to inform our final interpretation and recommendations for the evaluation plan of the HCPS balanced calendar.

Our research focused on the following three questions:

1. What are the essential components of a comprehensive evaluation plan for the HCPS balanced calendar initiative?
2. How can the balanced calendar evaluation plan drive improvement within the division?
3. How can HCPS use the evaluation plan to strengthen support for the balanced calendar initiative in the larger community?

### Theoretical Understandings

Our research was informed by realist evaluation which assumes that projects are influenced by the various ways stakeholders respond to them. The realist evaluation framework acknowledges that projects work under certain conditions and are influenced by external inputs. A realist evaluation attempts to answer what aspects of the project work for whom, under what circumstances, and why (Marchal et al., n.d.). As Ray Pawson (2003), co-creator of realist

evaluation theory, explains, “programs are theories incarnate, they can be shaped by the vision of people well beyond those with direct responsibility for its conduct” (p. 478).

In addition, our team employed an equity lens focused on student access and outcomes. There are many definitions of equity; our team used the definition offered in *Navigating EdEquity VA: Virginia’s Roadmap to Equity* (2020) adapted from the National Equity Project. “Equity in education is eliminating the predictability of student outcomes based on race, gender, zip code, ability, socioeconomic status or languages spoken at home” (p.10). Our team’s equity orientation influenced our research design, search for interview and focus group participants, and data analysis. The goal of our capstone organizational improvement project is to support a reform effort undertaken by HCPS in the name of equitable outcomes for all their students. Our commitment to equity in our process, as well as our product, influenced who our team talked to, the questions we chose to ask, and how we engaged in the co-construction of models with stakeholders.

An essential step in our context-rich evaluation plan design was understanding how stakeholders respond to the balanced calendar initiative and what stakeholders perceive to be essential elements in a quality evaluation plan. As part of our research design and research stance, we intentionally drew data from multiple stakeholders and engaged in cycles of model building, sharing the emergent TOC model with stakeholders, gathering feedback, and refining the model.

### **Positionality of the Capstone Team**

The five members of the Capstone 2022 are doctoral students at Virginia Commonwealth University. We are all K-12 educators and administrators employed by public school divisions in the Commonwealth of Virginia. One member of our team, in a former role as a school

administrator, investigated the possibility of implementing a year-round schooling model in the team member's school. However, that team member has moved on to a new position and is no longer engaged in that effort. At this time, no member of the team is currently engaged in a division or school level move toward year-round school. No researcher has a direct relationship with the study participants that represents a conflict of interest or that may create bias in the organizational improvement study. Our team has been trained through the course of their master's and doctoral studies in the skills necessary to carry out the design of this study.

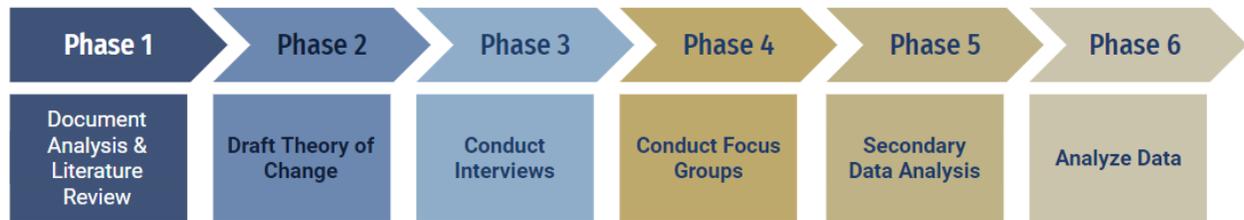
### **Data Sources**

The primary data reported in this study were collected from seven focus groups and five individual semi-structured interviews. Data included individual interviews and focus groups with HCPS central office administrators, school administrators, intersession coordinators, teachers, and families (Creswell, 2014; Kuckartz, 2014; Kuckartz, 2019). In addition, the team conducted a document analysis by reviewing HCPS internal documents related to the balanced calendar (Bowen, 2009; Frey, 2018). Concurrently, the team conducted a secondary analysis of survey data collected by the Capstone 2021 team (Clarke & Cosette, 2000). Through these three streams of research, the team triangulated our data (Anderson, 2021a; Anderson 2021b). In this way, we endeavored to ensure that our evaluation plan recommendations would be grounded in the realities of the community, representing voices of community members and offering appropriate approaches to iterative improvement for the HCPS balanced calendar initiative.

Figure 7 provides an overview of the research phases our team engaged in through the Capstone 2022 process.

**Figure 7**

*Visual representation of the Capstone Analysis Phases*



*Note:* Graphic developed by Capstone 2022 team.

Phases one and two were accomplished from June to September of 2021. Our team moved into phase three in October and completed phase four in January. The final phases of the project were completed from December 2021 to March 2022. Table 5 gives an overview of how each of the first five phases aligns with our research questions. Specific methods are described in detail in the section that follows.

**Table 5***Research Questions Aligned to Methods of Data Collection*

Research Questions	Methods of Data Collection				
	Interview	Focus Group	Secondary Data Analysis	Review of Literature	Review of HCPS Documents
What are the essential components of a quality comprehensive evaluation plan for the HCPS balanced calendar initiative?	Dr. Hackney Mr. Davis School Board Members School Staff Members	Principals Teachers Central Office Staff Intersession Coordinators HCPS families		X	X
How can the balanced calendar evaluation plan drive improvement within the district?	Dr. Hackney Mr. Davis School Board Members School Staff Members	Principals Teachers Central Office Staff Intersession Coordinators HCPS families		X	X
How can HCPS use the evaluation plan to build support for the balanced calendar initiative in the larger community?	Dr. Hackney Mr. Davis School Board Members School Staff Members	Principals Teachers Central Office Staff Intersession Coordinators HCPS families	HCPS Families	X	X

## Data Collection

### Phase I: Document Analysis and Literature Review

#### *Document Analysis*

We began by requesting access to all HCPS documents relevant to the balanced calendar including the files shared with Capstone 2021, and HCPS files created since the previous year. Our partner, Mr. Davis, confirmed the willingness of Dr. Hackney to freely share their working and completed documents (B. Davis, personal communication, June 17, 2021). Concurrently, we reviewed the division's website and social media accounts. We were interested in seeing how the division presented its innovation in these public electronic forums. We were also curious about any feedback from community members about the balanced calendar innovation on the division's social media accounts. Additionally, the members of Capstone 2021 shared their working files and the final products presented to their capstone committee and to HCPS.

The types of artifacts and documents reviewed are summarized in Table 6. Mr. Davis initially shared 76 Google folders pertaining to the balanced calendar initiative. The folders contained 158 documents comprising 36 spreadsheets, 72 documents, 27 PDFs, five images, seven videos, five Google Forms, and six Google Slides presentations. Our review of publicly available information included HCPS's social media presence via Facebook, the division website, the HCPS Intersession Course Catalog, the *Superintendent's Message*, and HCPS School Board documents. News media stories, both current and historical, established a timeline and impetus for the balanced calendar, as well as its evolution from planning to implementation. We also accessed HCPS accreditation information through the Virginia Department of Education's Virginia School Quality Profiles site. After our initial analysis, we continued to check these sources for updates that could impact the balanced calendar implementation.

**Table 6***Sampling of Types of Documents and Artifacts Reviewed*

Types of Documents	Sample Documents
HCPS Internal Documents	Strategic Plan, Grant Applications, Funding
HCPS & VDOE Public Documents	2021-2022 Calendar, Presentations, Balanced Calendar FAQs, Superintendent’s Messages, School Quality Profiles (VDOE)
Balanced Calendar Documents	Intersession Planning Templates, Intersession Course Catalog, Surveys and resultant data, Timelines
Social Media and News	News media stories, updates, and releases, Facebook Page
VCU Related Documents	Client Request for Capstone Study (RFA), Capstone 2021 working documents, Capstone 2021 Report

Documents such as the VDOE grant application solidified our understanding of the HCPS vision for the balanced calendar. Templates for intersession course planning illuminated the iterative process used to ensure each intersession course met HCPS expectations for deeper learning experiences. Expenditure reports, school calendars, and facility management plans demonstrated the logistical complexity of the balanced calendar. A variety of promotional materials including videos, Facebook posts, and web pages illustrated the major themes of the balanced calendar communicated to diverse stakeholders. The online intersession course catalog and registration form detailed the number and diversity of intersession courses. Finally, intersession assessment instruments such as surveys for families, students, teachers, and exhibition evaluation surveys provided an insight into the types of formative assessments HCPS used for the first round of intersession courses. To codify this process, the team created a

spreadsheet of the documents and artifacts significant to our work. The review of these documents was key to helping us define our problem of practice and theory of change.

### ***Literature Review***

While concurrently reviewing HCPS documents, the team turned to existing scholarly literature and developed the first draft of a literature review matrix in July 2021. Team members used several of VCU's databases and a number of external searches to seek out research relative to our understanding of our work.

Education Resources Information Center (ERIC) was the primary search engine utilized. Additional databases consulted included EBSCO, Google Scholar, and the Web of Science. The following combinations of search terms were used: "program evaluation and enrichment programs," "program evaluation and effective components," also "year-round school and academic achievement," "extended learning and student achievement," "extended learning and student outcomes," and "evaluation and communication." Several articles were selected through using "program evaluation and change science." Through this initial review, new learnings surfaced, including the concepts of Theory of Change (TOC) and logic models.

After reviewing our initial findings from the literature, we met again with our partner in August 2021. Mr. Davis was enthusiastic about the direction of our analysis and search, particularly the importance of constructing a TOC and a logic model to develop a comprehensive evaluation of the balanced calendar initiative (B. Davis, personal communication, August 16, 2021).

Based on our partner's feedback, the team conducted an additional search of the literature and refined our literature review matrix. Our second search focused on TOCs, data-based decision making, continuous improvement, improvement science, and communication through

the lens of education. Google Scholar, ERIC, EBSCO, and Proquest were again used to search the terms “theory of change and evaluation and communication,” and “continuous improvement and education,” “theory of change and education development,” “theory of change and logic model,” and “theory of change and program evaluation.”

Our final literature review spreadsheet included 42 peer-reviewed journal articles covering eight research studies, four artifacts from practitioner presentations, six books or chapters, and nine government or think tank reports. Within the literature review matrix, the team annotated each document to include a citation, search engine, type of study, limitations, findings, and implications for our work. Once our second search of the literature was complete, the team began creating our draft TOC based on our understanding of the balanced calendar initiative.

## **Phase II: Theory of Change**

As described in the introduction chapter, our team engaged in an iterative and collaborative process to draft a TOC for HCPS throughout the summer of 2021. Chapter II offers the research basis for constructing a TOC (Little, 2014; USDOE, 2014; USDHHS, 1999; W. K. Kellogg Foundation, 2017). We recognized that to create a successful theory-based evaluation plan for HCPS, we needed a well-defined and agreed-upon TOC.

We first shared our draft TOC with Mr. Davis on August 16, 2021, who then shared it with Dr. Hackney and the HCPS School Board on September 9, 2021.

During our Capstone 2022 investigation, we sought diverse stakeholder input in phase two of our research as we continued to refine the HCPS TOC. We reviewed our draft of the TOC, line by line, with each of the interview participants. In the focus groups, we asked questions guided by the TOC, but did not show the draft to the members of the group.

## **Interview & Focus Group Participants**

Significant data reported in this capstone project were collected from five individual interviews with key organizational leaders. In the Fall of 2021, our team conducted individual interviews with three HCPS personnel and two HCPS School Board members. All data were collected and analyzed in accordance with the regulations for human subjects research as detailed by the Virginia Commonwealth University. Because the project undertaken by the Capstone 2022 team is an organizational improvement study, an institutional review board application was not required.

### **Interview Participants**

We recruited participants employed by HCPS by circulating an invitation to HCPS's central office staff, teachers, administrators, staff, and school board members, through email invitations sent by Mr. Davis and through posts to HCPS social media (Appendix J includes the text of the invitation). Four employees and school board members responded to the interview invitation; all of the respondents were interviewed. The team also decided to interview one HCPS employee that responded to the focus group invitation. This person was asked to interview rather than be part of a focus group based on her background and experiences with HCPS.

### **Staff Focus Group Participants**

The focus groups were conducted at separate times through Zoom. The individuals were selected and interviews were organized based on their roles as stakeholders: teachers, intersession coordinators, central office staff, school administrators, and HCPS families. A total of 16 HCPS employees made up five of the focus groups. Five HCPS families participated in two focus groups. Family representatives were parents and caregivers, not students. Our team aimed for each HCPS focus group to have between three to five participants. All of the focus

groups, except two with two participants, met our goal. These exceptions included only two participants because of last-minute cancellations.

Five focus groups were held with HCPS employees. Twenty-nine people responded to the employee focus group invitation, and 25 of the respondents were invited to participate (86.2%) in the focus groups. Four people were screened out before invitations were distributed: two people were not full-time employees of HCPS, and two people responded after the deadline to participate. Of the 25 respondents invited to participate in the employee focus groups, 16 participated (64% of the total invited). Personnel that participated in either interviews or focus groups included two board members, four central office administrators, three intersession coordinators, three building level administrators, and nine faculty/staff. The building level employees were primarily based at one of the three HCPS elementary schools (11 participants), but also represented the pre-school (two participants), middle school (one participant), the alternative school (one participant), and the high school (one participant).

The visible demographics of our employee interview and focus group participants were 19 female, two male, four African American, and 17 White. The personnel taking part in interviews and focus groups skewed female (90.5%) and White (81%). This follows national trends for the education workforce which is overwhelmingly white and female (National Center for Education Statistics, 2021). These demographics were not reflective however, of HCPS student enrollment nor community composition (VDOE, n.d.; U.S. Census Bureau, 2021). Roughly half of the participants indicated they lived in Hopewell and had strong connections to the community

### **Family Focus Groups Participants**

Focus groups with HCPS families were our third source for qualitative data. To recruit HCPS families for focus groups, an invitation was circulated through email by Mr. Davis. Additionally, the invitation was posted to HCPS social media (see Appendix J). This was done initially in December 2021; only one parent responded. The second attempt to elicit family focus group participants was in January 2022; this invitation was far more successful. Twenty-three people responded to the focus group invitation and all of the respondents were invited to participate. Of those invited to participate in the family focus groups, five participated of the 23 that had responded (21.7%). Unfortunately, 15 of the 23 family focus group respondents replied on the day of the focus groups, limiting their opportunity to participate because of timing. We recognize that some logistical issues resulted in a lower rate of family member participation than the team desired. All of the family focus group participants had a child at one of the HCPS's elementary schools and one participant also had a child at Hopewell High School. The visible demographics of our family focus groups skewed female (80%) and African American (80%).

### **Phase III: Interviews**

The team developed a protocol used with each interview (see Appendix H). A rotating pair of members worked together to conduct each of the interviews. The interviews began with introductions and a statement of the purpose of our work. At the start of each interview, the participants were read a description of the team's commitment to confidentiality and our process for interacting with the interview recordings, should the participant agree to be recorded. Only with the participant's express and repeated permission did the team begin to record the interviews on Zoom and on a smartphone backup recording device. As discussed with the participants, recordings were deleted once the research was completed.

Early interview questions sought to build trust and create an environment conducive to open discussion (Creswell & Poth, 2018). The interviews continued with thirteen open-ended questions that aligned with our research questions. Two interview questions specifically reviewed our draft TOC line by line with four of the five interview participants. Throughout the interview, the facilitator followed up on specific participant responses with probing questions to gain further insight into the responses provided. The ability to ask clarifying and probing questions is one of the benefits of interviews over other qualitative data collection methods (Creswell, 2014). Each interview lasted approximately one hour and was conducted virtually using the Zoom video conferencing platform. The team's process of analysis of both the interview and focus group transcripts is described in detail in Phase VI.

#### **Phase IV: Focus Groups**

In addition to interviews, our team conducted seven focus groups from November to January. The responses from the focus groups helped our team establish a deeper understanding of the points of consensus and divergence among multiple stakeholder groups. Through focus groups, researchers are able to uncover attitudes and perceptions that participants may be reluctant to share in other mediums. The focus group setting may help to reduce participant experience of tension and anxiety by interviewing several people at one time in a more casual environment than an individual interview (Kristiansen & Grønkjær, 2018). Conducting focus groups also allowed our team to observe interactions between participants' ideas and perceptions (Creswell & Poth, 2018). The virtual Zoom platform presented some limitations to spontaneous conversation among group members. To address these limitations, Capstone 2022 team members attempted to solicit individual participation through extending wait time and ensuring everyone had an opportunity to voice their opinions and respond to previous speakers' comments. An

advantage of the virtual format was that it allowed greater ease of participation for some respondents who participated in the focus groups while also supervising domestic responsibilities at home.

The focus group interview was scripted for research consistency. The focus group and individual interview protocols were similar, except that the focus group protocol (see Appendix I) did not include visually reviewing the TOC with the group. After gaining permission to record the proceedings, each focus group with HCPS personnel began with our research team's purpose statement and research questions, followed by a series of eleven questions. Of those eleven questions, six questions were adapted to ask HCPS families. As much as possible, while following the focus group protocol script, the tone of the focus groups was conversational. Focus group participants were encouraged to respond to the opinions and experiences raised by other members. Each focus group session lasted approximately one hour.

The use of focus groups aligns well with the purpose and theoretical understanding of our team's investigation. Each of the research questions requires multiple levels of input from stakeholders. Although the interviews revealed individual understandings, priorities, and goals of the HCPS balanced calendar initiative, the focus groups included the benefit of group interactions in synthesizing community beliefs, norms, and values (Kristiansen & Grønkjær, 2018).

### **Phase V: Secondary Data Analysis**

In the next phase of our research, we conducted a secondary analysis of Capstone 2021's family survey data (see Appendix K). We wondered what insights our team could gain from analyzing the quantitative data collected from over 200 HCPS families during the previous year. Secondary data analysis involves the "use of existing data sets to answer new research questions"

(Clarke & Cossette, 2000, p.2). Our secondary data analysis allowed us to access quantitative responses aligned with our third research question; this deepened our understanding of how HCPS can most effectively communicate to stakeholders about the balanced calendar initiative. Although our team thoroughly reviewed Capstone 2021's description of their findings, per secondary data analysis best practice we returned to the original survey and survey responses to conduct our own analysis of the survey data (Clarke & Cossette, 2000; Rogers et al., 2006).

We believe that because this data was generated by the previous capstone team, some of the concerns about the use of secondary data analysis were addressed. This data was deemed to be from a reliable internal source. It was collected by a team of VCU doctoral candidates who were exposed to similar coursework, curricular demands, and dissertation preparation work that we have experienced as doctoral students. Next, both Capstone 2021 and Capstone 2022 worked with the same faculty committee chair. Also, Capstone 2021 collected their survey data from the same school division involving the same target population upon which our research question focuses. Our third research question, "How can HCPS use the evaluation plan to strengthen support for the balanced calendar initiative in the larger community?" and Capstone 2021's third research question, "How can HCPS communicate their progress in ways that increase support for the balanced calendar initiative?" share similar purposes, which ignited our curiosity to re-analyze and reinterpret the data set collected by the Capstone 2021 team.

Capstone 2021 administered a survey to determine how the "HCPS parent community defines success for the balanced calendar initiative and determine which means of communication are most desirable for addressing change and celebrating successes" (Baber et al., 2021, p. 70). Their data was collected from December 2020 to January 2021. Submissions were received from 620 family respondents (242 in full and 378 in part). The survey consisted of

12 individual prompts that included four demographic questions, four five-point Likert scale questions with multiple sub-prompts, two multiple-answer prompts, an open-ended prompt, and a request for the participant's email address. The survey was designed to take approximately seven minutes. The team used QuestionPro to manage data collected by the survey.

The initial survey was distributed via direct text messages to HCPS parents using the division's existing platform, Remind.com. However, data collected during this initial distribution indicated that email and Facebook were also favorable communication methods, and thus were added in the second distribution. Due to challenges in the functionality of the original survey, only 50% of participants who opened the survey completed it (Baber et al., 2021). Following changes made to the survey's functionality to improve accessibility, the completion rate in the second iteration rose to 100% of participants that opened the survey. The report indicated that survey respondents were evenly distributed among the division's five schools despite student enrollment being much higher across the elementary schools (Baber et al., 2021).

Our team reviewed the raw data, re-sorted and classified it, and analyzed percentages in response to the Likert scale questions. For the two free-response questions in the Capstone 2021 survey, we began with an open coding process, similar to our analysis of the qualitative data described in phase VI. After completing an open code of all responses, we then compared those results to the thematic coding of our qualitative data from focus groups and interviews. Through this iterative process, we gleaned further understandings about family communication preferences.

### **Phase VI: Qualitative Data Analysis**

Capstone 2022 concluded gathering qualitative interview and focus group data by January 2022. All interviews and focus groups were digitally recorded and transcribed using

Zoom transcription software. The Zoom transcripts were then transferred to word processing documents and individual team members reviewed the transcript while watching the video of the interview to ensure the transcript was transcribed to verbatim quality. After achieving verbatim quality, the individual transcripts were uploaded to Google Sheets with a separate tab for each transcript. The shared spreadsheet document allowed the team to work collaboratively finding codes and themes from the transcript data set.

The team engaged in the qualitative thematic analysis of the texts by seeking to find “core consistencies and meanings” across the twelve verbatim transcripts (Patton, 2002, p.453). This inductive approach allows themes to emerge from the data rather than beginning with themes prior to examining the data (Schram, 2006). Our team also used the research questions themselves to focus the categorization of our codes. Thus, our thematic analysis was both inductive and deductive (Kuckartz, 2019).

Next, to begin establishing our shared codes, each member of our team added a summary note in a separate column to capture the main idea expressed in each row of text in the spreadsheet. After all members had completed their initial notation, we met together to look across the rows of the spreadsheet to determine whether the members of the team had offered similar interpretations of the text. When there were differences among team members in the interpretation of the response, we discussed our interpretation to arrive at a shared consensus (Kuckartz, 2019). After unpacking the meaning and reaching a resolution, we wrote a consensus statement summarizing the main idea of each row. Table 7 shows an example of a single row section of the interview with our independently created summaries in columns 2-6, and our consensus memo in the final column.

**Table 7***Coding Process Example*

<b>Quotation</b>	<b>Summary 1</b>	<b>Summary 2</b>	<b>Summary 3</b>	<b>Summary 4</b>	<b>Summary 5</b>	<b>Consensus Memo</b>
The goals of the balanced calendar that immediately pops into my mind is the fact that we know as we were under the old type calendar that oftentimes our children during the summer months would lose some of the learning that they had gained the year before. With the balanced calendar, we are there for these children throughout an entire year, along with intersessions and that strengthens that continued learning process. That's the most important thing for me.	Balanced calendar fights summer learning loss: Priority to 'be there' for students	Critical pieces - we are there for the children	Goal of balanced calendar - Student Achievement (strengthen continued learning - reduce loss of learning during summer)	Focus not on academics	Reason for Balanced calendar	Reason for Balanced Calendar: Achievement  Reason for Balanced Calendar: Reduce Summer Learning Loss

Note: One idea expressed by an interview participant is featured in the first column. The team's summaries are in the middle five columns and our consensus memos are in the final column.

Our consensus memos, derived from individual team members' code responses and team discussion, formed the basis of our first iteration of a code dictionary. The code dictionary enabled the team to have shared definitions and to ensure consistency in the analysis of future transcripts.

In spite of the team's effort to differentiate respondents' thoughts on separate rows, there were several examples where participants combined multiple ideas in a single response. By necessity, these were captured in a single line on the spreadsheet. Therefore, in some excerpts, single lines of text received multiple codes from the team. For example, the response to the question "What results of the balanced calendar do you think are the most important to share with the community?" was analyzed by the team to include five codes:

RESPONSE They say, (16) a picture speaks volumes over just a word. So sharing (17) some of the things we have captured in these sessions, Sharing where we are, (41) as far as SOL results, academic results, (13, 15) having forums and keeping the community abreast of where we are in the process.

As we analyzed transcripts, we divided responses to separate rows in the spreadsheets where possible, but left answers such as the example above in a single line to accurately capture the respondent's ideas and sentiments.

After we completed coding a single transcript as a team of five, we worked in pairs to test interrater-reliability with these memos or codes for three additional transcripts. This stage of textural analysis led us to further refine our code dictionary as we recognized larger themes or buckets of responses emerging from the diverse transcripts.

In the second phase of analysis, our entire list of 61 consensus memos was organized into themes. Our team considered the list of memos collectively and analyzed the list for redundancies and irrelevancies. In this phase of analysis, we used the lens of our three research questions to help organize our codes and to better understand emergent themes. The second iteration of our coding dictionary was completed at the beginning of December. In this second code dictionary, we assigned a numeric value to each of the codes in a specific category. For

example, all responses about the general area “communication” were grouped in the 10s category and specific methods of communication were each assigned a number such as (11) Word of mouth, (12) Social media, (13) In-person-meetings, (14) Print-based, and so on.

Again, working in rotating pairs, our team revisited previously analyzed transcripts and updated our analysis of the individual transcripts using the updated numeric codes. Each team member offered their interpretation on a single column of all the rows of text. Once each partner had completed their coding, the pair met to analyze the assigned codes and determine agreement.

Once final coding for each of the interviews and focus groups was complete, the team discussed the qualitative data set for trends and emerging themes. This preliminary analysis revealed a number of patterns the team later distilled into findings and recommendations for the HCPS balanced calendar evaluation plan, which are shared in the fourth and fifth chapters.

### **Limitations**

There are a number of limitations to our research methods which fall into three categories: qualitative methods limitations, secondary data analysis limitations, and limitations within our document review.

#### **Qualitative Research Limitations**

The limitations related to our qualitative data are typical for a qualitative study. These include limitations arising from our participants and our data analysis. Another limitation comes from the impact of the COVID-19 pandemic on our overall environment. Additional limitations included the team itself, operationalizing an equity lens, and seeking student voice.

There are a number of limitations to consider regarding our participants. First, those participants we spoke with did so voluntarily, so our data comes from a self-selected group of people who were most interested in sharing their opinions. This may result in some skewing of

perceptions, positive or negative, in the researchers' understanding of general views about the balanced calendar initiative. Second, we only spoke with a limited number of administrators, staff, and parents. The nature of their responses should only be considered as representing their opinion and not representative of a class of people such as employees. These perspectives are accurate to a narrow group with small sample size. Each participant's response is a snapshot from an individual who carries a unique perspective, understanding, bias, and context. Often, the information provided by our participants was either anecdotal or an analogy. There may have been incidents where our participant's responses were contradictory. Also, either because the discussions were conducted virtually or for other reasons, there may have been occasions when our team misunderstood a participant's response. Lastly, not all questions and prompts were posed to all interviewees and focus groups due to time limitations.

As with the participants, each member of our team also brings unique perspectives, understandings, biases, and context. Furthermore, as doctoral students, our qualitative research skills continue to develop.

Additionally, although the team undertook this project with an equity lens, we could have operationalized this better. Our solicitations for interview or focus group participants was limited to electronic communication through Mr. Davis. Although this had a wide reach through division email listservs, Facebook, and Instagram, relying solely on electronic platforms undoubtedly failed to reach certain audiences. Our participants were predominantly, white, female, English speaking, and generally middle class. The team discussed doing direct mailings, posting fliers, reaching out through local community leaders, attending basketball games, or even conducting a focus group in Spanish. None of these steps were realized due to constraints of the ongoing pandemic and time limitations of capstone field work.

Perhaps our largest limitation was not including student voice in our study. Because of additional protections on minors for participating in academic surveys and interviews, our team found that student inclusion was not feasible with the timeline of our capstone year. Including student voice in an evaluation of the balanced calendar plays a prominent role in our recommendations described in Chapter 5.

### **Secondary Data Analysis Limitations**

Our team conducted a secondary analysis of survey results collected by the Capstone 2021 team. As noted in the original research, there were several limitations to this data set. The subset of the parent population surveyed was not representative of the parent population in general. The respondents demonstrated access to and a willingness to interact with electronic surveys, English language skills, and a desire to support researchers. These are not characteristics of all HCPS families. In addition, all of the family respondents to the survey stated that they had elementary-aged children. Thus, families with children only in grades 6th-12th were not included in the survey responses. This omission in the respondent demographic could be significant as middle and high school students may be key stakeholders to engage in intersessions. Dr. Hackney stated that the intersessions are intended to particularly engage students who may be at risk of disengagement, a phenomenon that increases with the age of students.

In addition, the format of the survey made it easier to respond from a personal computer rather than a smartphone. Thus, even family members with digital literacy and language skills who did not have a computer may have been precluded from easily participating in the survey. In addition, there were questions on the survey that lacked clarity; this may have influenced the completion rate as well as the comprehensiveness of the responses.

Finally, the survey results were collected during the height of the first wave of the COVID-19 pandemic, when HCPS was operating virtually. Thus, family interaction with schools was of a fundamentally different nature than when schools operated in-person with face-to-face instruction.

### **Document Review Limitations**

Our document review process began in late spring of 2021. Capstone 2021 shared their research, client presentation, and related documents. In early summer, Mr. Davis granted our team access to HCPS documents related to the balanced calendar. This trove of documents provided our team with ample opportunity to explore the evolution of the planning process for the balanced calendar initiative. There were some limitations to our document review.

Although Mr. Davis and the Capstone 2021 shared all the documents they believed to be related to the balanced calendar, there were likely some documents that were inadvertently excluded. Therefore, our collection of documents could be incomplete. For example, we did not have access to the division Title I, II, or III plans which may have informed our understanding of the impact of the balanced calendar in school and division improvement efforts. There may have been documents we should have requested, but did not know to request. With so many documents shared, it is possible that our team may have missed reviewing or not given appropriate attention to some crucial documents.

All of the documents shared were through Google Drive and Google Docs. There are two issues with this system that may have impacted our findings. First, the nested filing system and naming conventions within Google Drive and Google Docs may have hidden some documents from easy review. Second, because Google Docs are “live” documents, we may have reviewed a

document and drawn conclusions about that document, only to have the document revised or changed later without our team realizing we should review the document again.

With these limitations in mind, the team continued our work building an evaluation plan for HCPS balanced calendar through our multi-strand research work. Based upon our interviews, focus groups, document analysis, and secondary document analysis, the team began to see emerging themes that informed our findings and discussion. These are explored fully in chapter four of our organizational improvement study.

## **CHAPTER IV: Findings and Discussion**

In this chapter, we interweave findings from our mixed-methods research, which included qualitative research, secondary analysis of quantitative survey data, and document analysis. Our research process allowed us to hear high-level themes from participants as well as gain awareness of the more granular needs of stakeholders to inform the design of a comprehensive evaluation plan for the HCPS balanced calendar.

This information shapes the answers to our three research questions:

1. What are the essential components of a comprehensive evaluation plan for the HCPS balanced calendar initiative?
2. How can the balanced calendar evaluation plan drive improvement within the division?
3. How can HCPS use the evaluation plan to strengthen support for the balanced calendar initiative in the larger community?

### **What are the Essential Components of a Comprehensive Evaluation Plan for the HCPS Balanced Calendar?**

We began our focus groups and interviews seeking participants' opinions about the goals of the balanced calendar. We wondered whether the goals and measurements stated in the 2019 HCPS year-round school grant application (Hackney, 2019-2022), the Capstone RFA (2021), and other HCPS documents would align with the perceptions of the stakeholders we interviewed. We found that stakeholders identified similar goals as those stated in the reviewed documents. When asked about the goals of the balanced calendar, nearly every participant's response included two broad themes: improving students' learning experiences and improving teachers' work experience. Table 8 summarizes the goals for the balanced calendar identified by our respondents.

**Table 8***Goals for the Balanced Calendar and Stakeholders Who Endorsed These Goals*

Goals Identified for the Balanced Calendar	Groups who Endorsed these Goals
Increase student engagement	Board member, superintendent, administrators, teachers, parents, document analysis, secondary survey analysis
Increase academic achievement as measured on SOL assessments	Board members, superintendent
Increase academic achievement as determined by multiple measures	Board members, superintendent, administrators, teachers, parents, document analysis
Increase student well-being and learning through distributed breaks	Board members, superintendent, administrators, teachers, parents, document analysis
Increase teacher instructional skills and quality of instruction at HCPS	Board members, superintendent, administrators, teachers, document analysis
Improve teacher engagement and work experience	Board members, superintendent, administrators, teachers, document analysis

**Goal: Increase Student Engagement through Enrichment**

The most frequently endorsed goal of the balanced calendar was to provide students with opportunities for enrichment through intersession courses. Participants highlighted rich learning experiences available during the intersessions and also the need for the HCPS students to engage in the kinds of experiences often less available to students with fewer economic resources. One teacher offered, “the goal [of the balanced calendar] is to provide our students with experiences that they may not normally experience.” Another teacher echoed that sentiment, “Our kids are just so underexposed to the world, outside of Hopewell. [Intersessions] expand their horizons in

ways they just weren't going to get naturally.” A board member commented, “I am excited to know that our children are being exposed [during intersessions] to those critical things in life that they need to know. They have an opportunity for cultural learning, for economic learning, for hands-on experiences.” Dr. Hackney stated that the goal of the intersession courses was to “design instructional experiences that are unique, hands-on, experiential, and...project and problem-based to motivate kids to a different level of learning and experience.” A parent participant attested to the way her son experienced intersession as a highly engaging learning opportunity, reinforcing the perspective of the board member, school staff, and superintendent:

Those intersessions help out a great deal because he's still learning. It's more creative and fun...because they get to pick different [classes] like swimming, sports. They get to do different things, but at the same time, they're still getting some type of learning incorporated, overall it really keeps their minds and academics balanced.

Across interviews and focus groups, nearly every respondent affirmed the value of providing enriching opportunities for all students as an overarching goal of the HCPS balanced calendar.

### ***Develop a Love for Learning***

In addition to providing enrichment, intersessions were also endorsed as a way to develop a love for learning for all students, especially disengaged students. An administrator stated that intersessions, “give students the opportunity to understand that learning can be fun, it can be engaging. That there are so many other ways to learn, besides pencil and paper and books in the classroom.” Illustrating how the intersession courses developed an enthusiasm for learning among participants, one parent described his children’s positive experiences learning to cook during intersession and bringing their new cooking skills home to share with their family. A

board member described the joy and expansive learning opportunities she noted from students when she visited intersession courses:

As I visited classrooms and schools [during intersession], it was absolutely fantastic to see young students in elementary schools working on a project together, learning to be a team, learning how to listen, to talk back and forth, and the teacher walking around and smiling. Really it wasn't about whether or not [the students] knew the answers to the questions, it was far more extensive. . . It's above and beyond learning to be prepared for a test.

Echoing the theme, Dr. Hackney stressed the division's commitment to providing "equitable access to quality enrichment" was foundational to building student engagement and enthusiasm for learning.

The value of the balanced calendar, and especially intersessions, to create engaging learning opportunities that foster a love of learning for all students, was a consistent theme heard throughout our interviews and focus groups. Thus, measuring student engagement in enrichment opportunities should be an essential component of the evaluation plan.

### **Goal: Increase Academic Achievement**

When we asked about the essential components of an evaluation plan, we heard contrasting answers about the goal of academic achievement. Interestingly, when asked specifically about the *goals* of the balanced calendar, just a few participants mentioned increasing student academic achievement as a *direct result* of the balanced calendar initiative. Most participants mentioned analyzing student academic progress when discussing how to *measure the progress* of the balanced calendar, however, only the superintendent, the director of the balanced calendar, and one school board member specifically mentioned raising academic

achievement as measured by the SOLs as *a goal* of the balanced calendar. For example, Mr. Davis offered, “We also have a goal that it [balanced calendar] will increase or improve our overall academic performance, specifically in the area of our SOLs.” Dr. Hackney described the academic achievement as a goal of the initiative. When reviewing the TOC line that addressed the goals of the balanced calendar, a board member stated “I would add ‘to increase SOL scores’ (as a goal). I think those achievement tests will be a critical issue.” In a later portion of our interview, Dr. Hackney added, “Obviously, the State [VDOE] has not invested the amount of money they've invested for us to just say, ‘kids are happier and [are] having more fun.’”

We found it curious that only the division leaders and board members directly mentioned raising student academic achievement as a goal of the balanced calendar. These leaders know that raising SOL scores is a commitment for the VDOE grant (Hackney, 2019-2022) and that may be the reason they mention this specific measurement and other stakeholders do not. Perhaps the other respondents assumed raising test scores to be an obvious goal; or, perhaps academic achievement, as measured by state tests, was not top of mind to respondents when considering all of the possible goals of the balanced calendar initiative. While achievement, defined as an improvement on standardized test scores, may not be the goal of most stakeholders; student learning is. The evaluation plan will need to include measures of academic achievement that meet state requirements and additional measures of student academic growth that captivate other stakeholders.

### ***Reduce Summer Learning Loss***

Reducing summer learning loss, or *summer slide*, was another frequently cited goal of the balanced calendar in both interviews and focus groups. One school board member represented the views of many teacher and parent respondents when she said, “The students were losing

educational ground and academic ground during those three months [of summer]. It was telling when they came back in August or September. It is like starting all over again, to get them refreshed.”

Teachers affirmed the value of shorter breaks to maintain continuity of learning. This is exemplified by what a high school teacher shared, “By breaking things up and kind of shortening the breaks in between and having more breaks, the thought is you're not going to have to reteach so much at the beginning of the school calendar.” Another parent echoed the sentiment that shorter breaks would increase learning: “going from a two-three months summer break, and then coming back in September, it's rough. So [the balanced calendar allows students] just to retain information a little bit better.” Finally, a parent of a child with special needs stated that organizing the year with shorter and more frequent breaks would help her child be more successful.

My daughter [has] special needs and...she would have a hard time transitioning back after summer and it would almost be like starting over. I was on board for [the balanced calendar] because I knew it wouldn't be such a long break, where she would still remember the routine but wouldn't have to basically start all over. . . She actually liked school, and so I think she had a hard time when she would be off for 12 weeks and then come back and then be expected to go back into the fold.

Participants noted that for a diverse group of students and families, the distribution of school days throughout the year could result in improved academic performance and lessen the impact of lengthy breaks in learning. Although not stated directly, stakeholders may have been suggesting that by reducing summer learning loss, students would therefore demonstrate

increased academic achievement. Thus, the evaluation plan should include measures of learning comparing students who participate in intersessions with those who do not participate.

### ***Provide Additional Learning Time***

Providing additional time for student learning is the final goal participants identified to support student academic growth. One teacher talked about both summer learning loss and adding additional time for learning by stating, “One of the goals was to have them in school longer so that the slip [summer learning loss] doesn't occur, or [is]not as bad.” Another staff member commented on the value of the additional time offered by the intersessions, especially after the pandemic-associated learning loss, “Unless you have a plan to insert extra time, not just 180 days that we normally go, these kids really need to go to true year-round schooling because so many of them have missed gaps in learning.”

Respondents who noted a goal of having increased instructional time did not differentiate between the kinds of instruction occurring during the regular school year and during intersession classes. Nor did these respondents discuss that enrollment in the additional learning time of intersession is voluntary and therefore accessible only to those students and families who opt to enroll. Further, by design, intersession courses are not focused on remediation of grade-level content. Dr. Hackney echoed the focus on additional time and extended it to providing equitable opportunities for students.

I think the obvious goals are more instructional time for students who need more *and different* (emphasis added) in order to be successful with traditional school. So, my overall goal is to provide added meaningful learning experiences for children who need that, and many of whom have not found success with the traditional school calendar and instructional methodology.

### *Divergent Perspectives on Remediation*

Respondents offered divergent perspectives about the role of remediation during intersession courses. Neither of the chief architects of the balanced calendar, Dr. Hackney or Mr. Davis, suggested that remediation would be part of the intersession experience. However, the school board members, and some of the administrators, teachers, and parents mentioned the value of using the additional time for targeted academic remediation and support. One exemplar comment from an administrator was:

We need something to help them [teachers] with their students that are struggling that may want the extra help. I know a lot of the high school students in their survey commented that they would like extra help during those intersession weeks. Instead of just the fun stuff, they would like some of the extra help that they would be able to get from a teacher.

In contrast, a board member stated that including remediation in intersessions would defeat the purpose of the innovation. “The spirit of why we went to a balanced calendar needs to not lose focus. If it becomes a remediation type of thing, it will be another daunting task for our students, instead of being something that they enjoy doing.” As the division continues to evolve in its balanced calendar design, it will be important to monitor whether the design remains true to the goal of enrichment for all students or whether intersession courses begin to slide into the cycles of remediation common in high-poverty school divisions.

### **Goal: Improve Student Well-Being and Relationships by Redistributing Breaks**

The second most affirmed goal of the balanced calendar was to increase student well-being by redistributing learning and breaks throughout the calendar year. Participants spoke of

increased motivation provided through more frequent breaks and the opportunity for students to recharge more often.

### ***Increase Student Well-Being***

One parent described how the distributed breaks in the balanced calendar motivate her child to perform better academically and provide a needed respite from the pressures of school. She said when her children go to school after a break they are, “really excited for the first two months, and then the grades start [to decline], the behaviors start. . . Letting them know that a break is coming up in two weeks, they push through those two weeks and get it done.” The same parent concluded that one important goal of the balanced calendar was to “give everybody the breaks to regroup and time to come back fully charged. The bottom [line] goal is to have these kids educated the way that the parents want and the teachers hope for.”

A teacher stated that the balanced calendar will, “help the students and the teachers retain more of a flow, more of a regularity. . . Just giving some brain breaks throughout the year so we're not going for as long of a time.” Another teacher commented on the positive result of the first intersession break in the fall of 2021 for her students.

I was petrified to come back from intersessions because I thought, ‘These kids are going to forget how to walk in the hallway, and eat their lunch, and they're going to forget adding and subtracting and all of that stuff.’ But actually, when they came back in, you could just look at them and they looked happier to be back in school. They all enjoyed their break. They couldn't wait to tell me what they did over break whether it was intersessions at a different school where they met different friends, or at home.

### *Strengthen Relationships*

A consistent theme throughout the qualitative research, document review, and secondary data analysis was the care Hopewell community members feel toward their students. Participants noted that the distributed breaks of the balanced calendar allow for a more consistent academic presence and improved relations between students and school. One board member highlighted this ethic of care, which motivated her support of the balanced calendar. “With the balanced calendar, we are there for these children throughout an entire year, along with intersessions, and that strengthens and continues the learning process. That's the most important thing for me.” Throughout the interview, this board member suggested that one of the goals of the balanced calendar is to help improve connections between students and the school, thereby improving well-being and learning for students. A school administrator echoed this sentiment when describing how the extra work of the intersessions is worthwhile because the intersessions provide a safe, structured, and life-enriching environment for students.

We know they had meals during the time that they were here with us. Is it extra work?

Yes, to a certain degree. But we're going to be able to produce children that [will] grow up and be good citizens and have options for what they want to do in their lives.

The goal of mitigating negative environmental impacts was shared by several staff members. Thus, the evaluation plan should include measures to determine whether students' sense of well-being and connection is increased through the balanced calendar. Specific measures of whether participation in intersessions has a further positive impact on student well-being will also be valuable to determine whether the balanced calendar is meeting the stakeholder goals for the initiative.

**Goal: Increase Teacher Instructional Skills and the Quality of Instruction**

Mr. Davis stated that while the division aimed to provide students with additional instructional time through intersessions, HCPS also sees intersessions, “as an opportunity to move to some non-traditional instructional styles and thereby move our entire division forward in our craft.” Mr. Davis’ statement echoes Dr. Hackney, who stated that an important goal of the balanced calendar was to, “encourage our teachers to move from traditional teaching to teaching something that they’re passionate about, and taking the pressure off of . . . teaching to the SOLs, the content, and, sadly, the test.” Teachers and administrators affirmed Mr. Davis and Dr. Hackney’s sentiments when they noted that one of the goals of the balanced calendar is to change the styles and focus of instruction from one of test preparation to one of lifelong learning and success for all students through deeper learning experiences.

***Deeper Learning***

Dr. Hackney described how the move toward increased deeper learning practices is strengthened through intersession planning and instruction.

This is our fifth year of a very, very strategic deeper learning journey, of transforming how we teach and how students learn. This is not, ‘do PBL in the intersessions, but go back to drill and kill in each marking period.’ We’re trying to move our district slowly and strategically. And it’s too slow for me, but I also know that slow is what works and is sustainable to creating these types of learning experiences. Our thinking with teachers is that if we give them a two-week environment to just get so insanely, I call it *radically crazy*, with what they do and how they do it, and how they embed the content within these radically crazy experiences, they will, over time, develop more of a comfort level by rethinking their instruction during the regular marking periods, as well.

A teacher picked up on this theme in a faculty focus group when they described the emphasis on experiential, project-based learning when planning intersessions. There is “a push to do things outside of the classroom, to go on field trips, to not just be sitting at desks all day.” Another teacher respondent noted that intersessions could provide a laboratory for practicing deeper learning strategies that could later be implemented in the regular classroom. “There's a push division-wide toward deeper learning, and the intersessions provide a time and a space to have more attention on some of those deeper learning principles.”

A school board member also endorsed the move toward deeper learning within the balanced calendar when describing the goals of the initiative, “This is what Hopewell needs at this time, especially the deeper learning. It’s no longer just learning writing, reading, and arithmetic, but everything that's beyond that’s pertinent to life.” Although the term “deeper learning” was not mentioned in the parent focus groups, parents did endorse the value of intersession courses to engage students in active, hands-on learning that prepares them for full and rich lives beyond the classroom. Given the deeper learning connections noted, a longer-term measure of the impact of the balanced calendar may include assessing how the pedagogical hallmarks of deeper learning have transferred from the *explore work* of intersessions into the *core work* of daily academic instruction.

### **Goal: Improve Teacher Engagement and Work Experience**

Respondents offered that a significant goal of the balanced calendar was to improve the teachers’ work experience. The focus on adding quality to teachers’ professional experiences included more joyful teaching opportunities and increased ease through more evenly distributed breaks in the teaching calendar.

### ***Teachers Sharing their Passions and Increasing their Joy***

In many of the interviews and focus groups, respondents' comments reflected one of the balanced calendar's goals to encourage teachers to have fun while teaching their passions. Several teachers commented on the opportunity to "teach their passions" and "show their passions" to students like "knitting or cooking, something like that." A board member commented, "it's an opportunity for teachers to thrive in things other than just their subject matter. So many [teachers] have other skills: gardening, cooking, baking, fishing, golf." Affirming the theme in his interview, Mr. Davis stated that the intersession course instruction should be, "fun for students and fun for teachers." These statements endorse HCPS's unique strategic plan (HCPS, 2017) which lists *fun* and *joy* as goals for teacher and student experiences. Dr. Hackney, in her interview, stated that among her goals for the balanced calendar, teacher well-being is high on the list. Dr. Hackney stated that a main goal for her is to

...keep my teachers healthy and motivated and excited about getting out of that box. And helping them find and design, not just these wonderful experiences for the kids, but for themselves. I've told them this from the get-go, your joy will be impacted if we get this right. Your satisfaction, your love of this calling, the reason you got into this work, . . . will return, if we do this right.

Measuring teacher engagement through their affective experiences of designing and facilitating intersession courses will need to be another component of the evaluation plan.

### ***Teachers Benefit from Distributed Breaks***

In several focus groups and interviews, respondents noted that one of the stated goals of the balanced calendar was for distributed breaks throughout the year to reduce teacher fatigue and burnout. Teachers offered evidence that this goal was met during the first intersession

saying, “Right when I was starting to feel like, ‘Oh my goodness, I need a break!’ There it was.” Another shared how recharged she felt after the first fall break. “When I got that first fall break I was like, ‘This is great!’ I loved it. It was amazing. I could recharge and...rethink what I'm doing [instructionally] going forward.” An additional teacher stated, “There were so many teachers who, in that last week in September, were like, ‘Oh my gosh, I'm actually getting to go home and take care of my house, and spend time with my parents, and things like that.’” Other teachers mentioned the benefit of never being more than nine weeks from a break. Finally, a parent stated that her understanding of the goal of distributed breaks was to benefit both students and teachers. “For me, I think it's to give the kids more of a break [and] give teachers more time to regroup and come back fully charged. Breaks are important for everyone.” For the evaluation plan, teacher engagement and attrition measures may also capture the impact of these distributed breaks on teacher work experience.

### **What to Measure and How to Measure**

To solicit participants’ input regarding measurements of success and improvement, we asked the following open-ended questions,

- How would you suggest the success of the balanced calendar be measured?
- What data or information do you believe would be beneficial to make improvements to the balanced calendar initiative?

We found that participants’ responses fell under two overarching themes, “what to measure” and “how to measure” the success of the balanced calendar initiative. Table 9 provides an overview of the categories for both of these themes.

**Table 9***Measurement Themes and Categories*

What to Measure	How to Measure
Student Academic Achievement	SOL Scores and Grades
Student Participation & Engagement	Regular School Attendance, Intersession Enrollment, Student Input (Student Friendly Surveys, Interviews/Focus Groups, etc.)
Student Well-being	Discipline Referrals, Climate Surveys
Teacher Engagement	Teacher Input (Surveys, Interviews/Focus Groups, etc.), Teacher Retention
Parent Satisfaction	Parent Input (Surveys, Interviews/Focus Groups, etc.)
Instructional Improvement	Deeper Learning Framework

*Measuring Student Academic Achievement*

Among the measures discussed, student achievement was the most frequently recommended. In fact, many participants stated that it was the most important component to measure. An administrator stated, “definitely [measure] student growth and achievement. I think that as a parent, parents want to know how these things are really positively impacting their children and setting them up for a better future.” This sentiment was repeated by a school board member, “certainly it's important to look at how they're achieving. The achievement side of it and how [students are] learning.” Although Dr. Hackney felt there were other indicators of greater importance to measure, she acknowledged that increased student achievement was a must.

I think it's [the balanced calendar initiative] got to translate to student achievement outcomes, traditional and otherwise. So let me get that out of the way, check that off the list. These kids have got to do better and be more successful in school.

Several participants also suggested that the division should measure student achievement through standardized measures such as Standards of Learning (SOL) test scores. A school board member agreed, saying, “increase SOL scores.” All five of the parents interviewed endorsed using SOL scores to measure student achievement. Most parents thought that the SOL test scores from the 2021-2022 academic year should be compared to the scores from years before the implementation of the balanced calendar. One parent shared that, “testing scores...compare [them] prior to the balanced calendar.” She explained this would be like “pre and post-testing [in order] to see the difference.”

Other participants conveyed that student achievement should not be measured solely through SOL scores but also through student grades. This idea was reflected in school a board member’s response,

I think not just SOL scores...SOL scores do not always reflect the students’ educational, academic grades. Because there are students who are A, B students, but when it comes to SOLs, sometimes they're not scoring as high, just because it's a standardized test.

### ***Measuring Student Engagement***

Both interview and focus group participants also advocated for measuring student engagement and fun. When asked, “What do you believe are the most important components to include in a comprehensive evaluation plan?” Mr. Davis expressed, “I actually think that this whole thing being fun is...most important.” Many participants shared this viewpoint and

explained that student engagement and fun could be measured in multiple ways such as intersession course enrollment, regular school attendance, and student input.

**Intersession Enrollment.** Several participants noted the importance of measuring student participation in intersession courses, positing that if students were enrolling in and attending intersession courses then this would indicate that students were having fun and that the balanced calendar initiative was successful. A school board member stressed the importance of measuring if students “are actually participating [in intersession courses], or are they just staying at home?” An administrator explained, “If the [intersession] activities...[are] done, in a fun, meaningful way for the kids, they're going to want to be there, and they're going to want to show up.” Mr. Davis shared that intersession enrollment was a simple measurement, “are more [students] showing up or fewer?” A staff member expanded on this idea, “I think that...the change in [intersession] enrollment, [if] it goes up or [if] it goes drastically down...would be a good indication of how it is [working].”

**Regular School Attendance.** Other participants suggested that regular school attendance also would be an important metric. Participants believed that more frequent breaks and access to engaging and fun intersession courses would lead to an increase in students' attendance during the regular school year; therefore, measuring attendance during the traditional academic quarters would be a good indicator of success. Dr. Hackney stated that “it's going to translate to attendance because kids want to be there.” Another staff member explained that attendance would be a good measure in order “to see if students' attendance rises because they get these periodic breaks or because [of] the intersession [courses].” A school board member agreed, “I believe attendance will tell us how successful it [the balanced calendar initiative] is.”

**Student Input.** Many participants voiced the importance of learning about the experience from the students' perspective as a method of measuring the balanced calendar. The strongest proponent, Dr. Hackney, stated, "I think the most powerful data is what we get from our kids. Whether that's a survey, whether it's empathy interviews...I think that what kids tell us should drive our adjustments." Parents also affirmed the importance of student input. One parent stated, "I think you would definitely have to ask the students and staff because...students and staff are the people that are actually experiencing this, so getting their opinion is...slightly more important than parents' [opinions]." Another parent repeated this viewpoint stating, "Ask the children. Sometimes as parents, we have a harder time adjusting than they do. I think it's important to ask them how they feel because...some children learn better in this kind of setting."

Several HCPS participants offered ideas for collecting student input. A building administrator suggested empathy interviews as an effective way to capture students' voices and determine whether students are having fun. She explained, "empathy interviews [are] where students talk about...what they did, why they did it, how they did it. Having that voice of the children." A staff member suggested that students should be interviewed before and after intersession courses to truly learn about their experiences. She shared, "The easiest way to find out if something is helping [is to] interview them. Have entry and exit interviews...interview them at the beginning and the end of the intersession."

Other HCPS participants mentioned using surveys to gather student input. Several of these participants noted that the division had already administered surveys to students after the first intersession. A teacher shared, "I do know that we did student surveys at the end of the fall intersession. So definitely I think getting feedback from the students to see whether or not they enjoyed [it]." Although most participants like the idea of using surveys to gather student input, a

few cautioned that the surveys needed to be appropriate for the age group of the students. Two participants mentioned that the surveys sent out after the first intersession were geared towards students who could read and therefore made it very difficult for younger students to complete without the support of a teacher. A teacher explained that the surveys needed to be “scaffolded” for the different grade levels. She expanded on this idea by noting that the survey should include a “happy face, neutral face, [and] frowny face” for the younger students.

### ***Measuring Student Well-Being***

Several participants emphasized the importance of measuring the impact that the distributed breaks of the balanced calendar were having on students’ social, emotional, and mental well-being, as well as their overall behavior. A staff member voiced that it was just as important to determine if students were improving behaviorally and becoming better people as it was to determine if they were growing academically. She explained, “If we looked at behavior, and if the behavior was the only thing that was better, this program would be considered a success in my book.” An administrator agreed that discipline referrals should be a metric that is collected to determine “if we’re having fewer problems with discipline.”

A staff member reiterated that the success of the balanced calendar should not “only be evaluated by academic, standardized testing.” Instead, she suggested that it “also needs to have a measure of climate and culture.” A school board member agreed with this idea and recommended that the division also measure well-being by “gauging the environment. How are the students emotionally, socially, mentally? We should see a change there.” Another staff member affirmed the need to assess the impact on students’ mental health. She explained that HCPS could measure student well-being through video testimonials of students talking about their experiences and how “it’s affecting their mental health [and] how their attitude towards

school might be changing.” Another indicator that could be used to measure the impact on students’ well-being mentioned by both Dr. Hackney and Mr. Davis was the climate survey that the VDOE administers. Mr. Davis stated,

The state already has us measure climate within schools every two years. That's something that we want to try to measure every year so that we can see, are improving or not? Are we declining in terms of our performance with climate?

### ***Measuring Teacher & Staff Engagement and Well-Being***

Teacher engagement was shared by many participants as a measure to evaluate the balanced calendar initiative. Both HCPS staff and parent participants discussed the importance of understanding the impact of the balanced calendar initiative from the teachers’ perspective. A staff member suggested “temperature checks” throughout this first year of implementation and continuing into future years to see if “teachers [are] happier.” Mr. Davis echoed this thought, “Are teachers excited about doing this and wanting to do more of it? Are they excited about trying to repeat...[intersession] courses?” A parent shared that it would be important for “teachers [to] give input as to what they feel would make the things that [aren’t working] work better.”

**Teacher and Staff Input.** One of the most frequently recommended metrics was gathering teacher and staff input. An administrator shared, “I’m assuming there's going to be some touching base with teachers, by way of a survey or focus groups...or empathy interviews or something like that to get input from staff.” A staff member explained, “We need teachers' input...about how intersession went and how the balanced calendar [is going] in regards to their part of it.” She stressed that the division needed teachers’ input in order to determine how to continue to improve their experience.

Several HCPS participants and a school board member mentioned using surveys to gather input from not just teachers but all staff members. A staff member stressed the importance of getting input from all staff members in order to make improvements. She shared, “A lot of times surveys don't include support staff like janitors, cafeteria workers, and even teacher aides. I think it's important that you get their feelings and their thoughts about it, because...it impacts their jobs.” Other participants, who had worked the first intersession, expressed the need to make sure that teachers were not only allowed, but also empowered, to give honest feedback in order to continue to improve the experience for students, staff, and families. A teacher expanded on this idea, “I think that teachers...need to be solicited for, and allowed to give, truly honest and transparent feedback about...things that need to have procedural tweaks.”

**Teacher Retention.** Two administrators expressed that a key indicator of teacher well-being and engagement is the rate of teacher retention. One shared,

Retention rates for staff...do we keep staff? Because we had some [teachers] jump ship [leave HCPS] who did not want to participate in the initial piece. Then we had some that wanted to come here just because they heard that we were going to a balanced calendar.”

Davis reiterated this sentiment,

Do our teachers, do our staff, end up resigning and saying, “It’s not for me. I'm going to go somewhere else.”? And [then] we have [teacher] retention issues, where we're having to worry about hiring more people. Or, are people saying, “Oh, I want to stick around and stay here.”?

Furthermore, when asked about factors that might interfere with the balanced calendar reaching its goals, a school member was concerned that teachers might leave HCPS because their own

children attended schools in different divisions whose schedules clashed with the HCPS school calendar. She stated,

I worried about our staff and our teachers...because a lot of our teachers are not from Hopewell. Their children are attending other school divisions...I watched carefully when we first started...I was watching to see if we had a lot of teachers leaving the school system. We didn't. And I think because they all felt like they were partners in creating this program, same with staff.

Including a metric to monitor teacher retention will be an important aspect of the comprehensive evaluation plan.

### ***Measuring Parent Satisfaction***

Parent input was another metric that staff members, administrators, school board members, and parents expressed was important to measure to determine the success of the balanced calendar initiative. A staff member shared, "Family satisfaction outcomes will matter more." Many staff members and parents mentioned using surveys to determine parents' satisfaction. An administrator shared, "surveying parents...could be a measure to see how successful it [the balanced calendar initiative] is." A school board member expanded on this idea, "parent surveys, maybe halfway through, saying, 'how is your child adapting to this program?'" Several parents also expressed the importance of gathering parent input. A parent stated, "Definitely any kind of survey from parents." Another parent shared, "I'd like to see what works and what doesn't work, and then see if they're [HCPS] open to having parents...give input."

One staff member expressed that she did not believe surveys were the best means of getting parents' feedback. A teacher shared that HCPS staff members needed to have more conversations with parents such as, "Talking to the parents as they were picking up and dropping

off [their children during intersession].” She expanded on this by explaining, “a lot of our parents are illiterate and they can't read. They don't have access at home to the Internet, so these surveys going out through email...parents aren't responding [because] they're not getting it.” Another staff member worried that the division was not getting input from all families. A teacher explained, “I would love to get parent input from all of our different demographic groups.” Stakeholders’ comments support the finding that evaluation plan tools must enable the equitable collection of responses to reflect the diversity of the division.

### ***Measuring Instructional Improvement***

Interestingly, only a few administrators recommended measuring instructional improvement as an indicator that the initiative was successful, or if improvements were needed. These administrators shared a belief that teachers’ regular instruction throughout the school year would start to change as they began to incorporate the types of learning opportunities they are providing students during intersessions into their regular instruction. One administrator explained,

I don't know how you would measure this, but the teachers [who] have a lot of children sign up for their intersession [classes], those teachers teach throughout...the year. We [could] learn something about their instructional strategies that transcended from [their] intersession [course] to [their regular] classrooms.

Another administrator reiterated this idea of measuring the change in instruction that is happening after teachers instruct their intersession class. She shared,

You should see over time, that when teachers realize success is happening during that week, they start to think [about] what [they] can change about their teaching practices during the school year to achieve some of those same successes, on a regular basis.

Other administrators who endorsed measuring instructional improvement did so with a focus on deeper learning. One administrator suggested that the division should measure the progress teachers make implementing deeper learning during both intersession courses and regular instruction to see if, “we’re on the track for deeper learning...[to see] how we’re doing as far as that path is concerned, to see if we’re in line...with that.” This idea of focusing on deeper learning was clearly present in another administrator’s response,

In Hopewell, we have deeper learning frameworks...so, if we begin to see improvement in it [instruction], [if we] begin to see teachers going deeper into those frameworks, and improvement in [their] instruction in terms of its depth, I think that...could somewhat be attributed to what we’re doing with balanced calendar and intersessions.

### ***Aligning Measurements and Goals***

Interview and focus group participants provided in-depth recommendations for how to measure the impact of the balanced calendar initiative in order to determine if it is achieving the established goals, as well as how to highlight areas of improvement that might be necessary throughout its implementation. The key indicators suggested by participants were student achievement, student engagement, student well-being, instructional improvement, as well as teacher and parent satisfaction. A comparison of the goals and measurements identified by our focus group and interview participants is represented in Table 10. There were five areas of agreement between goals and measurements. An area of divergence is *parent satisfaction* which was noted as an area to measure, but not explicitly stated as a goal.

**Table 10***Comparison of Identified Goals and Measurements for the Balanced Calendar*

Identified Desired Goals	Identified Desired Measurements
Increase Student Academic Achievement <ul style="list-style-type: none"> <li>• Raise academic achievement</li> <li>• Reduce summer learning loss</li> <li>• Increase learning time</li> </ul>	Measure Student Academic Achievement <ul style="list-style-type: none"> <li>• SOL scores</li> <li>• Student grades</li> </ul>
Improve Student Learning Experience <ul style="list-style-type: none"> <li>• Increase student engagement through joyful, fun enrichment courses</li> <li>• Develop a love of learning through active learning experiences</li> </ul>	Measure Student Engagement <ul style="list-style-type: none"> <li>• Regular school attendance</li> <li>• Intersession enrollment</li> <li>• Student input/testimonials (student-friendly surveys, interviews, etc.)</li> </ul>
Increase Student Well-being <ul style="list-style-type: none"> <li>• Strengthen relationships within school</li> <li>• Distribute breaks for increased rejuvenation</li> </ul>	Measure Student Well-being <ul style="list-style-type: none"> <li>• Discipline referrals</li> <li>• Climate survey</li> <li>• Student input/testimonials (student-friendly surveys, interviews/focus groups, etc.)</li> </ul>
Increase Teacher Instructional Skills <ul style="list-style-type: none"> <li>• Increase deeper learning pedagogical skills through teaching intersession courses</li> </ul>	Measure Instructional Improvement <ul style="list-style-type: none"> <li>• Deeper learning framework</li> </ul>
Improve Teacher Work Experience <ul style="list-style-type: none"> <li>• Increase teacher joy through passion-driven teaching</li> <li>• Decrease teacher burn-out and attrition</li> </ul>	Measure Teacher Engagement & Well-being <ul style="list-style-type: none"> <li>• Teacher input (surveys, interviews/focus groups, etc.)</li> <li>• Teacher retention</li> </ul>
	Measure Parent Satisfaction <ul style="list-style-type: none"> <li>• Parent input (surveys, interviews/focus groups, etc.)</li> </ul>

Measuring parent satisfaction may be an area for further development in the evaluation plan. Parent satisfaction may relate to increasing community investment in the balanced calendar

innovation, an area identified in the working Theory of Change (TOC). The research team heard *increasing community investment* as either a goal or measurement for the balanced calendar from the superintendent, director of the balanced calendar, and school board members. Family members and other school staff members did not specifically mention increasing community investment as a goal or measurement of the balanced calendar. This divergence in responses, and ways to address community investment in the balanced calendar, is explored in more detail in response to our third research question.

### **Reviewing and Revising the Theory of Change**

As detailed in our problem refinement and literature review, co-developing a Theory of Change with stakeholders is an essential step in designing a theory-based evaluation plan. In four of our five interviews, we reviewed the *Balanced Calendar Theory of Change 2.0* line by line. Interview respondents were universally positive in their reactions, with responses such as, “Love it, love it!” and, “I think it [the TOC] accurately reflects what we are trying to achieve” and, “These are correct.” The review process also prompted some respondents to reflect on positive aspects of the design and implementation of the balanced calendar initiative. One board member described the participatory planning process for the balanced calendar innovation, “A critical piece is [we] engage[d] the Hopewell community. We did not just keep with the school system and parents. There were public meetings where all citizens of Hopewell could come hear about it and ask questions.”

### ***Suggested Revisions to the Theory of Change***

There were two suggested revisions to the TOC from interview respondents. The first recommendation was to add student feedback as a measurement of the initiative’s effectiveness. Dr. Hackney stated, “The value of the experience from the student lens is an important

measurement to me...I would love to see us be a little bit more specific about the importance of measuring the student experience from their lens.” In a related suggestion, Mr. Davis advised “adding a measurement tool...focusing on the social-emotional learning component.” Both of these recommendations were incorporated into the team’s 3.0 version of the Balanced Calendar Theory of Change in both the measurement and goal sections of the TOC. See Appendix E for the most current iteration of the TOC, *Balanced Calendar Theory of Change 3.0*.

### **Timeline for Measuring Success**

When we asked about a reasonable timeline for measuring the success of the balanced calendar initiative, we consistently heard a desire to give the initiative sufficient time to develop. Respondents estimated that this would take at least three to five years. Two main themes emerged from participants' rationale for why it was important to give the initiative time: the need to make adjustments and the impact of COVID-19.

Several participants explained that the division would need time to learn about areas to improve and then make the necessary adjustments. An administrator explained, “The first year we're finding kinks that we didn't even know existed. Then...[in] the 2nd and 3rd year [we have] to address those kinks.” A staff member, who also expressed the need to give the initiative time, shared, “As long as we all stick with it, it's going to get better over time, as we figure out how to do things and become accustomed to doing things differently.” Dr. Hackney also expressed this view, “A reasonable timeline is probably three to five years, just in terms of change leadership and sustainability...It's [a] big change...there's a lot of tweaking we've got to do. There's a lot of learning we've got to do.”

Administrators acknowledged that they knew the first year of implementation was going to be challenging. One administrator noted, “You know when we started this journey, we were

told upfront the first year was going to be the roughest because of the quick turnaround between the traditional calendar and the balanced calendar.” Other administrators in the group agreed. Another administrator went on to describe beliefs regarding improvements for program implementation, “When you're talking about improvement, [you are] trying to either tweak it while you're in the middle of that intersession or plan on how to tweak it for the next intersession because it's an ongoing process.” This constructive approach points to the iterative process of improvement of a new initiative.

### ***Pandemic Disruption***

Participants in interviews and focus groups also expressed the belief that evaluating the initiative would need more time due to the impacts of COVID-19. A school board member stated, “We won't truly see the success of this until we get a handle on the pandemic. We may note some improvement, but I don't think we're going to see the full value...for a couple [of] years.” A staff member echoed this sentiment, “COVID has really negatively impacted...our kids...I think that we have to even out the playing field from an academic basis before we can really see whether or not the balanced calendar is working.” An administrator expressed that it was difficult to recommend a timeline due to the impact of COVID-19. She explained, “It's really hard to...figure out exactly how long it will take to get...at least on track for where we were before all of this [COVID] happened. So I think three to five years...as far as seeing success.”

Each of the parent respondents shared concern about the impact that COVID-19 would have on the evaluation timeline. A majority of these parents agreed that the initiative would need a few years in order to determine if it was successful. A parent explained, “I would...say two to three years...because we're in a pandemic...things are different...and you don't know what next

year holds.” Another parent agreed with a two to three-year timeline, “I would agree with the two to three years or maybe after we...go back to whatever normal was.” A parent reiterated the impact of COVID-19, “keeping in mind that the pandemic has just thrown a monkey wrench into all of it...Realistically, the only way that you could tell if this helps would be to run it for a couple more years minimum.”

Administrators, staff, and parents expressed concern about the pandemic’s negative impact on students and schools, and they all shared the belief that the effect of the balanced calendar will be difficult to measure until the pandemic has dissipated. The majority of interview and focus group participants agreed that measuring the success of the balanced calendar needed to be an ongoing process in order for iterative improvements to be made throughout its implementation. Participants from the different groups agreed that the initiative needed to be given at least three to five years in order to make adjustments before determining if the initiative was successful in meeting the desired outcomes. While the evaluation plan may not be able to fully account for the “pandemic effect” on balanced calendar implementation, it can provide an opportunity to gather information from stakeholders to inform improvements and provide additional context for evaluation results. In addition, the communication about progress for the balanced calendar, discussed further in the section answering our third research question, will need to include messaging that moving forward and making progress is the goal instead of perfection with a full acknowledgment of the challenges of implementation during this time.

### **How Can the Evaluation Plan Drive Improvement within the Division?**

In response to questions on how the balanced calendar evaluation plan can drive improvement, the key theme that emerged was the need for a sense of investment among all stakeholders created by an honest, collective assessment of the strengths and challenges facing

HCPS. Respondents cited a number of strengths that positioned HCPS well to execute the initiative. These strengths included positive leadership, a participatory process of creating the initiative, and widespread collaboration within the division. Challenges to building investment were also cited by multiple respondents. These challenges included the administration’s perceived lack of response to critical feedback, teacher turnover, logistical concerns, and the quality and consistency of instruction during intersessions. Table 11, below, summarizes the strengths and Table 12, on page 124, summarizes areas of concern. Both tables detail implications for the evaluation plan from these findings.

**Table 11**

*Strengths and Implications for Balanced Calendar Evaluation Plan*

Strengths to Drive Balanced Calendar Improvement	Implications for the Evaluation Plan
Strong leadership at the central office and building levels	Assess continued positive perception of leadership by stakeholders
Participatory process to build the balanced calendar initiative	Ensure continued participation by diverse stakeholders in the evolution of the balanced calendar initiative
Culture of collaboration	Monitor perceptions of positive collaboration practices and continue project tunings

**Strengths to Build Upon**

Having strong relationships in a small, interconnected community was described as a strength by many of the interviews and focus group participants. One administrator described the implications of this for HCPS stakeholders, “voice in a small community goes a long way.” Strong leadership was also cited as key to supporting these relationships and engaging

stakeholders. A school board member noted, “being a small school division, unlike Chesterfield, unlike...Fairfax...we do a lot of talking with each other. But Dr. Hackney and the assistant superintendent...they're out in the buildings...that's a critical piece.” Participants also valued HCPS's participatory process of designing and building the balanced calendar initiative and designing and building intersession courses. The other school board member affirmed the belief in the need for continued collaboration in HCPS saying, “The way we started is the way we have to continue...to keep the community involved.”

### ***Strong Leadership***

All of our interviewees and several of our focus group participants mentioned the strength of division and building leadership in guiding the change process to implement the balanced calendar initiative. A staff member stated, “Our leadership has done a great job trying to inform parents and educate everybody, businesses, the city itself, city leaders as well. That is a positive direction to go in.” This style of leadership helps to foster a sense of interconnectedness within the HCPS community. An administrator agreed, saying, “Another thing about Hopewell [City Public Schools] that's really good is we already have a very strong leadership team that calls on each other, even if we're not meeting. We're able to call on each other to collaborate.” An administrator observed, “Administrators attend grade-level planning...to get the teachers to collaborate...[Administrators have] some sidebar one-on-one conversations with teachers, when [administrators] sense that they're not working with their colleagues very well, and that they need encouragement.” This was echoed by another administrator, who felt that the balanced calendar initiative would not be sustainable without the current leadership, saying “If we had a change in leadership if both of our superintendents decided to leave the division, not everyone has the same level of commitment as them.” This points to a need to assess teacher and staff perceptions of

leadership support in the evaluation plan to ensure shared commitment. Participants acknowledged that strong leadership was a significant component of HCPS success. They also recognized the importance of the participatory process that HCPS leadership endorsed.

### *Participatory Process*

A strong culture of collaboration and teamwork was another internal strength endorsed by school board members, administrators, teachers, and other staff members alike. Examples of existing collaborative structures included professional learning communities, student study teams, cross-division administrative team collaboration, and, specific to the balanced calendar, the project tuning meetings. Many respondents endorsed the value of this participatory and collaborative division culture. Those in leadership roles felt that the process of implementing the balanced calendar had been highly participatory. A board member remarked that “in preparation to start...all the critical participants from parents to teachers to staff to even some students...came together and gave their opinions of what was needed and what was important...and what goals we should set.” Dr. Hackney also clearly supported the participatory process, stating:

...We need to have conversations, so we started these town hall meetings...We literally could physically feel the energy and the anxiety...We could feel it [level of anxiety] go down when we simply opened the structure to where they could talk to us, we could answer their questions. We added principals or anybody else that needed to be a part of the group.

Mr. Davis observed that collaboration was infused into creating intersession courses because the process was more bottom-up, where teachers are able to come up with their own themes, and their own course ideas.

Although parents did not cite the town-hall meetings, surveys, or widespread communication mentioned by HCPS leadership as examples of collaboration, this participatory process may have contributed to family participants offering a general endorsement of the balanced calendar initiative and of the school system in general. A parent shared their support of the school division by saying, “[the] school is filled with professional educators that are good at doing their job. Sure, I'm a parent, I do not have a degree in being a parent, I do not have a four-year degree in this. They do.” This endorsement was echoed by another parent when asked about concerns about the balanced calendar initiative, “None really. I like it. It’s great.” Given this appreciation, monitoring the trust and support of parents for the balanced calendar will be an important function within the evaluation plan.

### ***Widespread Collaboration***

Another strength mentioned by all of our interview participants, and by most of the participants in employee focus groups, was collaboration. Staff participants highlighted the strength of teams of stakeholders working together to plan intersessions. Project tunings, a method of informal evaluation of project-based learning, was frequently cited by staff participants as an example of collaborative improvement work. One teacher observed, “from the standpoint of intersessions, I will say that we did project tunings...our instructional coaches come together with the person...leading the intersession and we just went through...their plan and we made suggestions or asked clarifying questions.” This focus on project tuning meetings for improving intersession deeper learning, was echoed by intersession administrators. Speaking on her own experience, an administrator shared, “We did project tunings...for both schools...I did have several phone calls, with the principal...whenever she called me, we would have a conversation...[the other principal] was in a lot of my project tuning meetings...same with Mr.

Davis.” Because many of our respondents identified this process as already working well, it could be easily incorporated into the balanced calendar evaluation plan.

### ***A Contrasting Opinion***

Interestingly, a few contrasting opinions were voiced within the faculty focus groups regarding the participatory process in HCPS. Some personnel expressed concern that the intersession approval process was cumbersome and impeded creativity. A teacher said that the initiative had been marketed as the “freedom to do anything. But that morphed into everybody having to teach at least one intersession. Now it's mandatory. It has to go through a 10-step approval process. So...it really took the shine off [of the balanced calendar initiative].” This sentiment was echoed by another teacher who said, “We're not going to get to do [teach] the intersession [course] that we want to do, because it all has to be peer approved. There's how the program [intersession courses] is marketed, and there's how the program actually exists.” These responses from faculty members could point to a breakdown in the strength of the participatory process in HCPS between leadership and some faculty. Another important function of the evaluation plan will be to monitor participatory processes and help to identify when these processes become overly involved, impacting staff motivation for the balanced calendar.

### **Challenges to Address**

Participants in both interviews and focus groups mentioned a number of challenges to building investment in the balanced calendar initiative. These challenges are summarized in Table 12 with implications for the evaluation plan listed for each area of concern. Details of these concerns, supported by our research data, follow the table below.

**Table 12***Areas of Concern and Implications for Balanced Calendar Evaluation Plan*

Areas of Concern for Balanced Calendar Improvement	Implications for the Evaluation Plan
Divergence between proposal and practice of the balanced calendar	Use staff input to guide improvement cycles
Threat of “Over sell and under deliver”	
Perception that teacher and staff feedback is not valued	Demonstrate transparency in responding to staff input to guide improvement cycles
Intersession logistical issues: enrollment, transportation, supplies, storage, building maintenance	Assess improvement of operation issues
Quality and consistency of intersession instruction	Ensure high quality enrichment-focused instruction during intersessions
Assessment tools provided are not aligned with the balanced calendar goals, are not valid or reliable, and difficult to use	Investigate assessment tools for measuring well-being, project assessment, and deeper learning
	Use tools with increased validity and reliability, and greater ease of use by students, staff, and families
Confidentiality concerns with survey data reporting	Assess where individual student evaluation results are stored Ensure student privacy and legality of a student’s permanent education record
Inaccessible communication about the balanced calendar and intersession enrollment	Ensure access to all material related to intersessions are in the preferred written language of all families Use communication and enrollment means preferred by families

These first areas of concern that surfaced in our qualitative analysis were differences between the way the initiative was marketed and how it has been implemented. The second challenge was soliciting and responding to feedback. The latter concern was voiced most strongly by teachers and building-level administrators. The third theme was the widespread challenge that teacher attrition could pose to the initiative. Measuring teacher retention will be important in the evaluation, as the metric may indicate the level of staff support and engagement with the balanced calendar initiative.

### ***Disconnect Between Proposal and Practice***

Faculty and building-level administrators identified a disconnect between how the initiative was originally framed versus how it has developed this year. An administrator commented “We...need to be careful...[that] our recruiting pitch doesn’t over promise and under deliver...We got people on board and... Then we got into practice...[and] it wasn’t the [same] recruiting pitch.” These comments were mirrored by a teacher, “There’s a big difference in how this [balanced calendar initiative] is being marketed and how it’s being implemented. When there is a gap between marketing and reality, anytime expectations are thwarted, people get angry.” Leadership can respond to unproductive beliefs if there are effective mechanisms in the evaluation plan for soliciting and responding to stakeholder feedback.

An impassioned teacher offered these thoughts and suggestions, “The majority of us are firmly behind the premise that we were sold for the balanced calendar. [However] the implementation of both balanced calendar and the way intersessions have been handled has not been what we were sold.” She added specific support to her position, saying, “[Implementation] has been focused on micromanaging teachers...when it needed to be focused on getting the message out to the community. I think that we feel like the onus has been put in the wrong

place.” Other teachers in this focus group expressed agreement with her sincere enthusiasm for the initiative, yet frustration over instructional oversight and desire to have a voice in how the intersession courses were conducted.

Despite concerns and some frustration with the initial iteration of the intersession courses, the teacher and administrative voices we heard were optimistic. Every participant expressed a belief in the purpose of the initiative, saw clear pathways to its success, and shared a desire to put in the work to make the initiative successful. Capturing these voices in the evaluation stages and incorporating their input through improvement cycles has the potential to both drive program improvement and demonstrate to the larger community why the balanced calendar is a step forward for HCPS.

### ***Quality and Consistency of Instruction during Intersessions***

Participants among all groups expressed concern over the varying quality of instruction among the intersession courses, including the impacts of teacher buy-in or enthusiasm, differing levels of instructional skill among teachers, and age-appropriateness of intersession topics. An administrator shared, “One of the things that I really worry about...is...quality assurance. I worry about people cutting corners...People have other priorities or get busy or whatever...if the quality declines...that can sink the ship.” In this statement, we hear that the administrator is concerned not only with the quality of individual courses, but also the threat of multiple low-quality courses on the success of the entire program.

Teachers and building administrators shared similar concerns. One administrator expressed concern about “teachers not teaching the intersessions the way they're supposed to be teaching them.” She offered this evidence,

We had four classrooms that did a baking experience. Two and a half of those classes actually did baking with the kids...those kids came every day. Then you look at the class that wasn't [doing what they were] supposed to be doing [baking], and the kids lost interest and they didn't want to come.

**Lesson Planning.** Many of the teachers' concerns focused on the logistical challenges regarding lesson planning for the intersessions. These concerns illustrate administrative differences between planning for classes during the regular school year and planning for the intersessions. Comments from the teacher focus group revealed their dissatisfaction with how intersession lesson planning was being managed. Some teachers felt micromanaged by the level of detail required by administration, "We're professional adults and we don't need someone checking our homework every week." Others were concerned over the challenge of meeting with colleagues to plan for the intersessions while also completing their regular school year lesson plans, "We were having to meet two days of the week during the planning period, which often stretches two, three, and four days. [This] leaves us with no planning time." Also at issue was the value of meeting face-to-face. One teacher was particularly critical of some face-to-face meetings, "If it's a meeting that could have been an email, [then] it's not a meeting that needed to happen." In considering planning, meetings, and communication, our team decided to investigate these processes through an analysis of HCPS documents.

### ***Responding to Feedback***

Concern regarding response to feedback emerged among most faculty and building-level administrators. These concerns were acknowledged in interviews with division-level staff and school board members. Dr. Hackney explained the importance of responding effectively to faculty feedback while balancing competing demands.

Our most motivated and successful rock stars [teachers] with their intersession experiences said the day is too long. And I hear them, you know I hear them...but the kids need us as long as we can give us to them...We gotta figure that out. If they [teachers] are tired, they don't have enough breaks, they're struggling, [then] it's [the day] too long...that's going to trickle down to our kids.

An apprehension that division leadership may not respond to teacher feedback was shared by one intersession teacher, “We...were the guinea pigs...there are definitely...things that I would like to see adjusted...if our feedback wasn't...listened to, or acknowledged, if things kind [of]...stayed the same...I would be a little bit worried about continuing.” This was echoed by a staff member who stated it was important to “include the support staff to make sure they get their say...For instance, janitors had to rearrange their summer cleaning schedules to match [the intersessions]. The importance of response to feedback was echoed at the high school level as well. A teacher shared, “If we express...those things [critical feedback] we...get caught in a toxic positivity spiral where we're not encouraged to express those things honestly and truthfully...we need a mechanism to do that, and our feedback needs to be taken seriously.”

Parents affirmed the need for response to feedback to inform the improvement of the balanced calendar and intersessions. In focus group discussions, two parents noted it would be important to share input received from staff. Parents advised that sharing what does and does *not* work with regard to the balanced calendar initiative is valuable. It will be important for the evaluation plan to incorporate instruments that not only collect but also encourage candid feedback. Stakeholders will need to perceive that their feedback is accounted for and transparently responded to in the iterative improvement work of the division.

### ***Student and Teacher Feedback Valued***

Responses also highlighted the need for feedback from students, a parent suggested, “getting the students’ feedback [is important], because...we get a lot of...surveys...but if we could get the child[ren’s] response...even allow us to communicate it to them [our children]...so that it is their own words.” This statement underscored a general consensus by participants on the need for student feedback. Dr. Hackney and Mr. Davis strongly stressed the need for student input in their interviews. For example, Dr. Hackney stated, “If we're going to change something...the most powerful data that...is what our kids tell us...the student's experience...I believe that in everything but I'm certainly in these intersession experiences, where they have the choice to participate or not.”

After students, the most important group identified to solicit feedback from was teachers. As one administrator stated, “We don't have all the answers and it's OK...We've got to still use teachers’ input to make something work for all of us...Let's go back and see where we need to tweak for the next one [intersession course].” Inclusion of input mechanisms and communication of student and teacher responses in the evaluation plan will be central to building a sense of investment in the balanced calendar initiative.

### ***Logistical Concerns***

Focus group respondents demonstrated broad support for the initiative, but they also vocalized concern for how logistical challenges impacted program success and eroded enthusiasm for the initiative’s sustainability. The logistical concerns fell into two separate themes: operational issues in the schools and concerns over instructional management. A third overarching theme, logistical challenges stemming from miscues or misunderstandings in information and communication, was often included in the operational and instructional

concerns. In responses, it was sometimes difficult to establish if a particular logistical challenge resulted from a concrete issue or from a gap in communication. These statements provide valuable insight into specific logistical issues that an effective evaluation plan could capture through surveys of personnel and parents, feedback loops, and other continuous improvement measures.

### ***Operational Issues***

Administrators and teachers shared anecdotes about how the shift to the balanced calendar and intersession courses impacted basic operations such as enrollment in intersession courses, transportation, storage and supplies, and building maintenance. Often, comments reflected that items had been overlooked, but the issues were solvable given input from staff.

At the administrative level, Mr. Davis acknowledged the potential for operational challenges, saying “it gets very complicated...you're talking about transportation, finance [and] payroll, developing plans [and] getting instructional materials, the voice and choice that teachers [and] students have.” Staff and teachers echoed how such operational challenges impacted the intersession experience for students and staff. Input on specific revisions to division logistics could be gathered through careful surveying of stakeholders. Two examples of specific issues that arose were enrollment in intersessions and transportation.

**Enrollment and Transportation.** An administrator provided an example of having 100 students enrolled in six classrooms for the first intersession week and fewer than four full classrooms for the second week of intersession courses. Bus routes needed to be changed and combined to accommodate the decrease in enrollment for the second week of intersessions.

A teacher provided a different perspective regarding the overlap between transportation schedules and communication, “The only way I had transportation information was because I'm

friends with the assistant principal, so she just gave me transportation information. But it's not on that registration form at all.” This teacher went on to describe the impact of transportation communication gaps on students, “So you're just expecting these kids to know where to go, what bus [to catch]...you've got some kids [whose] daycare is closed or not picking them up and you just don't know where they're going.”

Another teacher described the effect of combined transportation and communication challenges on young elementary students confused and scared by being in unfamiliar places with adults they did not know. “[These children were] put on a different bus, brought to a different school and [are] freaking out.” She added concerns she heard from parents, “The mothers and fathers were calling me saying, ‘We can't send them back [the next day]. They’re screaming because it's not you [the teacher their children already know].” Another of her comments illustrates the divergence between the intersessions’ overarching purpose, students having fun through enriching learning opportunities, and the actual difficult experience some children had caused by logistical miscues. “That was a little scary for me with the little ones. Kids from my own class that went to other schools didn't have a fun experience for those logistical reasons.” These anecdotes point to areas of friction for the first round of intersessions because of logistical concerns.

**Supplies and Storage.** Educational supplies and their storage were another operational issue mentioned by participants. Participants described a range of challenges including general storage deficits, supply challenges caused by enrollment ambiguity, and a lack of storage for intersession-only items. An administrator stated, “I have things in my building for the spring intersession and...I barely have enough space to store the stuff that we regularly have, but I have to keep up with [supplies] coming in for intersession.” However, her positive, solution-oriented

attitude was evident in her concluding statement, “We have to keep working out a plan, we're making it work!”

The challenge of ordering supplies for an unpredictable number of students was brought up by a number of teachers. One teacher stated, “because all the ordering had to be done last spring, I had supplies for 10 kids and I had [only] two sign up, so I had to completely change my whole plan.” Another teacher shared the opposite problem, “All of a sudden, the first day, we ended up with three or four extra kids. Well, we didn't order supplies [for] those kids.” A third teacher echoed the challenge of supplies and unpredictable enrollment, “I had a bunch of kids that I didn't know and I didn't have supplies for... We had [to] scramble and reconfigure, which made an already crazy situation... more difficult when it didn't need to be.”

Finally, an intersession coordinator described inefficiencies associated with supplies, “...along the lines of the money issues, I had a teacher that ordered all this stuff for [her] intersession and then, when I go to pick up supplies [after the session was complete] every single supply was unopened, nothing was used.” This coordinator was upset about the fiscal irresponsibility and her wasted time. She added, “They need to be using these supplies because that's just wasted money... [She] didn't open any of the cooking supplies, [she] didn't use any of the perishable food items... I think there needs to be more accountability.” Improvements in this area could be garnered through personnel surveys after the first year of the balanced calendar is complete. Small changes could lead to larger success. Reallocation of funds, personnel, and resources will need to take place in building maintenance as well.

**Building Maintenance.** Logistical challenges to building maintenance were mentioned in two separate focus groups. Both comments reflected the need for custodial staff to be involved in planning due to the time and scheduling required to complete maintenance tasks. A participant

noted, “It takes a whole school year now to clean different sectors of the school... you need to have feedback on how this year-round schooling affected their [custodial staff] schedules.” A teacher described how custodians who were used to having the whole summer to work on an empty building, now have to make significant adjustments. “The custodians wanted to block off parts of the hallway...to put wax on the floor or to clean for COVID. Because...some hallways...were cut off, you had to walk around the...school and it’s not a small building.” In surveying personnel, it will be important to be inclusive of support personnel as well as faculty.

In conclusion, comments on operational logistical challenges reflect the newness of the program. Each of the challenges seems to have been addressed to some degree, and staff recognizes areas in which teachers could easily take corrective action. Stakeholders clearly value the opportunity to share their experiences and leaders need to know about them in order to resolve them. Assessing operational issues through means of surveys will be a critical function of the evaluation plan.

### **Concerns about Current Assessments**

Our document analysis revealed two primary areas in need of further development as the balanced calendar moves through its maiden voyage: alignment of assessments and strategic communication with stakeholders. Table 13 summarizes the current instruments used by HCPS to evaluate each measurement of the balanced calendar identified by stakeholders.

**Table 13***Current Tools for Measuring Balanced Calendar Impact*

Measurement	Data Source	Format	Frequency
Student Academic Achievement	SOL Assessment Results (VDOE)	Standardized Content-Based Assessment	Once per Academic Year or Course
Student Well-Being	School Climate Survey Results	Electronic Survey (VDOE)	Once per Two Years
	Student Survey Results (Self): Pre-Assessment	Electronic Survey (HCPS – Qualtrics)	Beginning of each Intersession Course
	Student Survey Results (Self): Post-Assessment	Electronic Survey (HCPS – Qualtrics)	End of each Intersession Course
	Student Survey Results (Peer)	Electronic Survey (HCPS – Qualtrics)	End of each Intersession Course
Instructional Improvement	Deeper Learning Framework (HCPS)	Electronic Feedback based on Rubric	Following each Intersession Course
	Teacher Reflection	Intersession Course Feedback Meeting	Upon Teacher Request after Course
Student Attendance	HCPS Student Information System	Report from VDOE based on HCPS Data	Once per Academic Year
Parent Satisfaction	Parent Intersession Feedback Survey	Electronic Survey (HCPS – Qualtrics)	Following each Intersession Course

*Alignment of the Goals of the Balanced Calendar and Assessment Tools*

As we reviewed the tools used to collect data about the efficacy of the balanced calendar, we noted that there were some measures stated in the 2019 year-round school grant application for which the instruments were well established and already required, such as attendance and

SOL assessment scores. These metrics align with stakeholder input we heard about measures of student well-being and achievement.

However, as noted in Table 13, some of the tools identified were created internally and there may be concerns about their validity or reliability as discussed in Step 5 of the evaluation plan. Examples include the HCPS-created deeper learning framework and social emotional learning (SEL) surveys used to measure student growth toward greater well-being.

Other identified instruments are infrequently or selectively administered such as the Virginia School Survey of Climate and Working Conditions. The grant lists the climate survey as a measurement tool to capture student growth in the stated goal of increased social-emotional competence and well-being. However, the state climate survey is only administered to upper grades, and the tool does not provide a student-specific analysis of social-emotional growth. In addition, the state climate survey sample population may vary from year to year. In 2021 the survey was administered to students and staff in schools with students in Grades 4 to 12. In 2022, the survey will be administered only to students and staff in schools with students in Grades 9 to 12 (Virginia Department of Criminal Justice Services, n.d.). These findings suggest the evaluation plan will need to include additional valid and reliable measures of student well-being and school climate.

### ***Challenge of Measuring Social Emotional Growth***

Mr. Davis shared the intersession student surveys (see Table 13) used to evaluate social emotional learning (SEL). These assessments were given to teachers to distribute to students and emailed to parents. For the first intersession, a single survey using the Qualtrics platform, was used for students in grades K-12. Accessing the SEL survey during the first intersession proved to be challenging as revealed in our document review where we found a list of 24 steps of

instructions to access the SEL survey, a two-page explanatory email about accessing the survey, and a six-minute video about how to access the survey, in addition to a two-minute video explaining how to take the survey. These findings point to the importance of using easier-to-access and easier-to-administer assessment tools for measuring student well-being and SEL growth.

In addition, there may have been some issues with accessibility for younger students both in the electronic form of the survey and with the language used in the survey. The first version of the survey, featured in Mr. Davis's two-minute explanatory video, instructs students to choose an SEL competency from the Collaborative for Academic, Social, and Emotional Learning (CASEL, <https://casel.org/>) framework and the Virginia SEL Standards of Learning (VDOE, 2021) to rate themselves at the beginning of the intersession and at the end of the session. For students unfamiliar with the language of the CASEL standards or SOLs this task may have been difficult. This concern about age-appropriateness of the survey instruments revealed during our document review was endorsed in the focus group interviews. Several teachers highlighted the challenges of the survey instrument for younger children. One teacher commented:

The surveys that Hopewell [Public Schools] personnel had created for us...were very challenging at the elementary level, because the questions were kind of like those critical thinking questions, that for adults were great and easy to answer, but for the kids, it was just a nightmare.

The surveys were also limited in distribution to those that had participated in an intersession. From our document review, we cannot determine a control group being used or a set of baseline data. Separating correlation from causation with current assessments will prove challenging.

After receiving negative feedback from teachers about the survey for the first week of intersession, Mr. Davis created a second SEL survey for K-2 students for the second intersession course. The format for both of these second-generation surveys asked students to determine an area of SEL competence from the CASEL framework that they would most like to develop during the week. The choices for the K-2 students included elaboration on the CASEL framework with an attempt at child-friendly language (in italics): *Understand How You Think and Feel* (Self-Awareness); *Organize and Control Yourself* (Self-Management); *Understand How Others Think and Feel* (Social-Awareness); *Treat Each Other Well* (Relationship Skills); *Make Good Decisions* (Decision Making). Again, after selecting an area for focused growth, students are instructed to rate themselves on a scale of 1 (hardest) to 5 (easiest) with colorful emoji face picture clues. For pre-literate kindergarten and first-grade students, understanding the language of CASEL standards and independently navigating the Google form was challenging and, in many cases, prohibitive.

At the end of the instructional video about taking the SEL survey, Mr. Davis states that at the end of the week students will “be able to give another score to see how they’ve grown and they will also be able to have a few peers do the assessment for them to tell them where they’re at.” It is difficult to imagine peer raters accurately determining the growth of their classmates in SEL skill development. In addition, there is a concern about how this data from peers would be recorded and used.

### ***Challenge of Measuring Deeper Learning***

The Deeper Learning Rubric is another instrument shared by Mr. Davis. The reviewed documents include three different deeper learning rubrics for Content Alignment, Critical Thinking and Problem Solving, and Communication and Collaboration. Each of these rubrics has

a four-point scale to rank both student and teacher performance. In conversation, Mr. Davis explained that the rubric and a project tuning protocol, along with notes from the team discussion of a project, are designed to measure the qualities of deeper learning present in the intersessions. In addition, there is a two-minute video of Mr. Davis demonstrating for teachers how to complete the Deeper Learning Framework Communication and Collaboration evaluation for individual students on the Qualtrics format using a smartphone.

The division documents indicate that parents also received intersession learning feedback surveys to measure student's experiences with deeper learning. As noted earlier, participants in staff focus groups raised concerns about the validity and accessibility of the intersession learning surveys sent to parents. It may be difficult to accurately assess how a one-week experience meaningfully developed competencies such as communication, critical thinking, problem solving, collaboration and citizenship for students in K-12 grades. It may also be difficult for their parents to evaluate their child's growth in these areas over the course of a one-week intersession experience.

### ***Challenge of Measuring Culminating Product and Performance***

The final assessment created by the division is a Culminating Product/ Performance rating to be completed by parents or students who attend the final exhibition of learning after an intersession. This form is available to audience members through a QR code scan with the instructions, "Scan with your phone and give this group feedback." Any audience member at any of the exhibitions can offer responses for the students about their exhibition or performance. After identifying the kind of presentation of learning, the respondent is asked to rate the performance with the query, "Did the student meet or exceed your expectations for the [blank on questionnaire], or was their work not quite there yet and they were either attempting or

approaching what you would have expected?” Respondents choose one of four options. Then the respondents are offered the opportunity to “Share any additional compliments or constructive feedback here. We ask that you be kind, specific, and helpful.”

While having audience participation by offering feedback to participants can be engaging and sometimes constructive, it is not a valid or reliable measure of the learning of students. In addition, there are no explicit instructions to the rater regarding any metrics for judging the standard of performance. The response of an adoring grandparent may be markedly different from that of a middle school peer, or an estranged neighbor. In our document review, we did not see the responses to these culminating performance assessments, so we were unable to analyze the resultant data to determine the usefulness of the responses.

### **Confidentiality Concerns with Survey Data Reporting**

The HCPS-created survey tools including the SEL survey, the deeper learning surveys and the product/performance evaluation feedback survey, are intended to be used during and after intersession courses to measure progress toward goals of the balanced calendar initiative. Through an hourly contract with Red Pepper Solutions (2021), three of these survey instruments were posted on the Qualtrics platform for survey delivery and analysis. The agreement between Red Pepper Software and HCPS (Red Pepper, 2021) states the following plan for the results of the SEL, deeper learning, and performance surveys. “Reporting on students will be conducted by exporting the responses in Data & Analysis, pushing into Google Analytics Suite then into PowerSchool. Reporting can be conducted in aggregate for Byron and on a granular level for the teachers of Hopewell [Public Schools]” (Red Pepper, 2021, p. 2). Our team has concerns about the apparent plan of recording SEL survey results from peers and community members into PowerSchool, the repository of the official educational records of a student. As the division

revises its evaluation metrics and methods for the balanced calendar issues of validity, reliability, accessibility, as well as respecting student legal privacy protections, should all be considered.

### **Concerns Regarding Equity in Communication**

The reviewed balanced calendar promotional materials shared through Google Docs, on HCPS managed websites, and their social media accounts are visually pleasing. The posts created for Facebook and Instagram appear to have been designed using Canva or other publishing programs, and have strong graphic design elements. Although we did not see email or text message communications in the trove of documents we analyzed, the education communication application Remind was mentioned by our respondents. From these accounts, it appears that Remind is central to the division's ability to send mass email or text communication.

After reviewing the documents, our team expressed some concern about stakeholder accessibility to the communication shared with families. This concern about accessibility was endorsed in one teacher focus group when multiple participants brought up the challenges of reaching HCPS's Hispanic community. Respondents highlighted the lack of materials or resources translated into Spanish for the first intersession enrollment process. Teacher participants also pointed out that the Hispanic community in Hopewell uses WhatsApp almost exclusively for communication. It is possible that messages were shared with families on this platform, however the records we reviewed do not have evidence of this. Respondents in our interviews and focus groups also mentioned the difficulties of reaching families with limited technology or internet access.

The first intersession sign-ups were completed by families through an interactive and attractively designed web-based catalog. We did not find paper-based enrollment forms in the documents we reviewed. In addition, the sign-up website in its first iteration was monolingual

English. Thus, families who did not have access to electronic sign-ups, or who read a language other than English, would not have had ready access to register their children for intersessions independently.

Additionally, our document analysis points to a need for alignment of assessments and strategic communication with stakeholders. Connection with all stakeholders is impeded, however, by evidence that feedback is not being sought in an authentic, equitable manner. While mechanisms for feedback in English through digital platforms demonstrate a high standard of quality and effort, the same attention has not been paid to non-digital communication or messages in languages other than English. This oversight excludes a significant portion of Hopewell parents and community members from providing information. Feedback from these stakeholders is essential to fully understanding the impact of the balanced calendar initiative. Participants' comments point to a desire to participate in a process of continual improvement of the balanced calendar informed by feedback from staff, teachers, and students.

### **How can HCPS use the Evaluation Plan to Strengthen Support for the Balanced Calendar Initiative in the Larger Community?**

In our interviews, a goal of building community investment in HCPS was an important component of the balanced calendar innovation cited by Dr. Hackney, Mr. Davis, and the school board members. Dr. Hackney observed, “One component that we don't typically measure...is the value to our community...As people understand what we're trying to do...and ultimately move to support it, then...we're a lot better insulated to continue [with the initiative]...and to seek additional funds to sustain (it).” Mr. Davis’ suggested that both “increased community investment in HCPS” and an “increased number of people or organizations that are interested in

being community partners” would provide evidence of community support for the balanced calendar.

A school board member affirmed that “a critical piece [of the balanced calendar] is to engage the Hopewell community.” Another school board member noted that having businesses host student internships during intersessions would result in business people developing stronger ties to the school division. “They're going to feel more connected, and they're going to want more of that. These are the things that we're going to...present to our communities and stakeholders as to how this balanced calendar year has changed things in Hopewell.”

Although teachers and school administrators did not speak about building community support as a goal or measurement of the balanced calendar initiative, they did discuss the need for community involvement. One teacher noted the potentially positive impact of soliciting community partners for intersession courses. “With us [teachers] stepping out with community partners, because of the ways some of the teachers have contacted resources and individuals and supplies...people [in the community] seem to be giving more back to the school.” A teacher stated, “It would be very neat if we could bring in community members within Hopewell and make that connection with the students...they need to see exactly what these kids have been doing, their feedback and their excitement. ” Another teacher summarized this hope, “ I would be interested to get some of these businesses and community members and officials to help us with these intersessions.” Involving community members as teachers during intersession courses and as audience members during exhibitions of learning could help to build greater community support for the initiative. Tracking the involvement of community organizations and businesses in intersession course offerings may be a useful metric in the evaluation plan.

Several parents offered ways that external stakeholders could help to broadcast balanced calendar success to the community. One parent suggested that HCPS connect with “...local organizations, local nonprofit organizations...faith-based organizations” in which HCPS children “...attend or know someone within those organizations.” She added, “...building those connections with the community [and] the organizations” is a powerful way to share students’ stories.

### **Communication to Build Community Support**

We asked participants what balanced calendar results they felt were most important to share, as well as how that information could most effectively be communicated. The types of information that were consistently identified were student achievement and student engagement, especially when shared by the students and teachers.

#### ***Communicating Student Achievement***

One administrator observed that an individual community member may embody multiple roles, such as teachers, parents, community leaders, or grandparents. As such, they have a keen interest “in what is happening with our [HCPS] students.” She noted, “student growth and achievement” were important to share. This sentiment was echoed by four of the five parents from our focus groups. Another parent, noting both his support for the balanced calendar initiative and certainty of positive results, was transparent in his reply, “I would intentionally go in and say, ‘Okay, this worked well [and] this [something different] worked well. This [a third thing], well, we’re not going to talk about that with our parents.’” While our research and recommendations support full transparency of evaluation data and embracing results as part of continuous improvement, this comment does illustrate how sharing positive, student-centered outcomes can build support.

**Student & Teacher Testimonials.** These findings aligned with the results from our secondary data analysis of the data collected by Capstone 2021. One of the questions included in the Capstone 2021 parent survey asked participants to rate the importance of sharing different outcomes of the balanced calendar with the community. This question consisted of seven ordinal scale questions where respondents selected a response ranging from 1 = very uninterested through 5 = very interested for each outcome listed. As shown in Table 14, 72% of the parent respondents who completed the 2021 Capstone survey ranked “academic achievement” as an important outcome to share with the community. As also shown in Table 14, the majority of respondents wanted to hear directly from teachers and students regarding their experiences with the balanced calendar initiative through “testimonials from teachers” (73%) and “testimonials from students” (72%).

**Table 14**

*Outcomes of Balanced Calendar: Respondent Interest*

	% Somewhat Interested & Very Interested Combined Responses
Testimonials from Teachers	73
Academic Achievement	72
Testimonials from Students	72
Opportunities for Parent and Community Involvement	71
Participation Data	69
Images and Videos of Intersessions	59
Testimonials from Business and Community Partners	50

### ***Communicating Student Engagement***

In the interviews and focus groups conducted by Capstone 2022, participants indicated that student engagement and satisfaction were essential to community support. A staff member noted, “the joy and the discovery of learning” during the intersessions was important to share. Telling stories of student engagement was also endorsed by Dr. Hackney. When asked, “What information about the impact of the balanced calendar could be communicated most effectively with external and internal stakeholders?” she replied without pause, “Students telling their own stories of their experiences...I think student stories are always the most powerful.”

The majority of parents in our focus groups (four out of the five) also expressed the importance of getting feedback from students to assess student engagement. One parent from the focus group stressed, “Getting the students’ feedback...I know we get a lot of these surveys... where they’re coming to the parent or guardian, but if we could get the child[‘s] response...because...they’re the ones actually in it.” Another parent advised she would be “more interested in seeing how students react and feel.” Therefore, measuring student engagement will be an important metric to communicate in the evaluation plan.

### ***Which Modes of Communication are Most Effective?***

One of our final interview questions focused on how best to communicate the impact of the balanced calendar initiative to different stakeholder groups. Responses varied based on the perspectives of individual participants. However, the responses generally revealed that the most effective communication methods help create a sense of connection, with the majority citing in-person meetings, events, and exhibitions. The reasons given by participants varied but had a consistent thread of leveraging any type of in-person event to strengthen the sense of connection to HCPS. Word of mouth and electronic communications were also cited as effective modes.

**In-Person Events.** A staff participant reflected on opportunities at sporting events, such as high school football games, to increase awareness of the balanced calendar initiative. “We have a very good football program here...a lot of people come out...that’s where they [internal and external stakeholders] are.” One leader suggested creating opportunities to bring community members and intersession teachers together to provide a space for dialogue to “see if we can all get on the same page together.” Another staff member lamented the missed opportunity at the high school’s registration day, an opportunity where parents, students, and staff are in one location, complete with translators present. She elaborated, “I feel like if we have events like that...[in the] spring we [need to] have an intersession booth where parents can come over and get the information from us.” Taking advantage of times when diverse stakeholders come together for communication will be an important element to consider.

**Word of Mouth.** Word of mouth was cited in three different administrator and staff focus groups as the best way to communicate, as it also reinforces the sense of connectedness. An administrator noted, “This town [is] only 11 square miles...parents will come to [school] to figure out, ‘How do I get my child to be part of this [intersession]?’” when they see other children’s excitement about their experiences. She added, “A child is going to come back [from an intersession opportunity] and tell someone else what they saw, what they liked, what they didn’t.” Therefore, word-of-mouth communication has an impact within Hopewell.

**Electronic Communication.** Although social media, email messages, text messages, and robotic phone calls are efficient, practical forms of communication, they were mentioned less frequently by administrator and staff participants. One leader acknowledged that social media, specifically Facebook and the HCPS website, is “used regularly...to get in front of situations because it [social media platforms] can be used for good or bad...A lot of times they [parents or

students] will go to social media before they'll go to other mediums." A staff member emphasized the importance of using the platforms used by the parents. She named Instagram, Facebook, YouTube, noting that, "every young parent in America [will] read it or look at it...They answer that [posts on Facebook] quick[ly] too." She humorously added, "I've been more effective in communicating [via those platforms]. But, if I send a letter, I've just wasted \$0.51 [cost of mailing a letter]."

In both parent focus groups, the use of social media, text messages, and robocalls were shared as effective forms of communication. One parent shared, "robocalls. Everybody answers a call, especially if it's an area code number that you know, and emails. You know nowadays everybody's on their phone all the time, so email [and] social media." Another parent agreed, explaining, "[the] quickest way to reach me...[is] sending out mass texts...if it's a more detailed [message] I'll definitely check my email, so I would say, one of those two."

### ***Secondary Data Analysis of Modes of Communication***

These findings of our qualitative analysis aligned with the results from our secondary analysis of Capstone 2021 survey data. One question on their survey prompted respondents to select which communication methods were most effective for HCPS to communicate updates regarding the progress of the balanced calendar initiative as well as which social media accounts they would want HCPS to use when sharing updates.

Table 15 shows that the majority of respondents (86%) prefer electronic communication methods such as email communication (25%) and text messages (22%) over print communication such as newsletters (9%) or in-person events (5%). Additionally, of the 13% of respondents who indicated that they prefer to receive information through social media, the majority of respondents (63%) rated Facebook the preferred social media account to

communicate information. This again aligned with our findings from our focus groups with parents.

**Table 15**

*Preferred Communication Methods*

Mode of Communication	% Respondents	Social Media	% Respondents
Email	25	Facebook	63
Text Message	22	Instagram	18
Phone Call	14	Twitter	8
Social Media	13	Other	10
Website	12		
Mailed Newsletter	9		
In Person Events	5		

*Intentional Communication Planning*

In his interview, Mr. Davis discussed the wide variety of communication methods available. He referenced previous conversations about the communication platforms HCPS uses and the challenges of having so many. He acknowledged the challenge, saying, “maybe someone ... loves email” and consistently checks it, but another person “... really preferred phone calls...[and then others] really prefer text and...[someone else]... prefers going to Facebook.” All of the different channels indicate a need to tailor communication to an intended audience.

There is no component of the balanced calendar that is not impacted by communication. As a testament to the importance of effective communication, Mr. Davis advised, “...it depends

on who your audiences are...as far as what is most important, it kind of depends on which group we're talking with." He further explained, "...our school board may be looking for specific pieces of measurement that are different than what parents might be looking for, or might be different than the Rotary Club is looking for."

Mr. Davis also shared the need to identify "...the right balance, the right timing, the right methods of distribution" to meet the needs of different stakeholder groups. Our findings suggest that the right amount will also matter. One parent reminded us that those results also must be communicated in a way that all stakeholders can receive. "...we're talking about taking a whole lot of information and trying to cram it down into a digestible pellet for people who are not going to have a lot of time or energy to work with us."

**Communicate Effectively with Non-English Speaking Families.** A staff member recognized a disconnect between non-English speaking families and how important information about the balanced calendar and intersessions was originally communicated. "I would love to get parent input from all of our different demographic groups. I'm...concerned with our immigrant population; about how well the calendar changes, what intersession is, and how to get into an intersession was communicated." This repeats a similar concern voiced in a different focus group about what information would be useful to improve the balanced calendar initiative.

HCPS is a small but diverse community that has many potential channels to communicate balanced calendar evaluation results. Buy-in across these diverse community groups will require communication strategies and methods that account for diverse language needs, cultural differences, communication preferences, and varying levels of digital literacy.

## **Chapter V: Recommendations to Inform Evaluation of the Balanced Calendar**

The focus of this capstone project has been to support the development of a comprehensive evaluation plan for the balanced calendar initiative. We have accomplished this through assessing the problem of practice facing HCPS and relevant research from the literature as well as through our own data collection and analysis.

Through our review of HCPS documents, we recognized the thorough steps HCPS undertook to solicit input and inform internal and external stakeholder groups about the benefits of two aspects of the balanced calendar initiative: redistributing the academic calendar days and creating authentic learning experiences for students through intersessions. Based on the documents we analyzed, it was apparent that Mr. Davis attended carefully to the numerous aspects of intersession planning. The shared desire for benefits to students and teachers was a clear focus from the initiative's inception.

We also saw a need to more clearly connect the actions or "levers" of the balanced calendar and intersessions to the desired outcomes and measurements of those outcomes. Building on the analysis of relevant HCPS documents, data from interviews and focus groups with administrators, teachers, parents, and board members helped to develop a Theory of Change (TOC) reflective of stakeholder input. Our TOC also helped HCPS stakeholders reflect on their understanding of how the balanced calendar should work and how those goals relate to what they expect it to achieve. Although all interviewed stakeholders strongly endorsed the revised TOC, there will be areas for adjustment as the initiative develops. Stakeholder input focused not only on the components of the evaluation plan but also on its use to drive improvement and strengthen support.

Our literature review provided insight on how crucial the planning of an evaluation is to a program's effectiveness. The purpose of a change initiative must be clearly identified and understood to ensure alignment of evaluation measures. Failure to align goals and measurements, including inattention to the appropriate timing of each evaluation measure, may provide misleading results or negatively affect the initiative's progress. The scholarly literature also illuminated critical components of an evaluation plan; we identified three main types of evaluation for the HCPS evaluation plan. As an initiative is first implemented and progresses in the early stages, formative assessments are most appropriate. As the initiative continues, forms of evaluation that monitor the ongoing progress should be undertaken. Summative assessment or evaluation of outcomes occurs at the end, or in the case of an initiative that is ongoing, at predetermined milestones.

Further, from our synthesis of research-based practices, we developed a cycle of seven steps for an evaluation plan: engage stakeholders, develop a theory of change and logic model, determine the type of evaluation, generate evaluation questions, identify data collection methods, analyze and interpret results, and implement iterative cycles of this process for ongoing, continuous improvement. Our seven recommendations align with these steps and provide the foundation for the evaluation plan developed for our client (see Appendix L). This cycle also illustrates that evaluation cannot occur in a vacuum; involving stakeholders and communicating results throughout the evaluation process is essential. Thus, in the evaluation plan we included intentional communication steps through the identification of a timeline for releasing assessment results, as well as sharing "quick wins" to build initial support for the change initiative.

**Recommendation 1: Activate an Advisory Committee and an Action Committee**

To address the first step of the evaluation cycle, engage stakeholders, we recommend that HCPS form two committees: an advisory committee and an action committee. The advisory committee will advise on all aspects of the balanced calendar initiative and should be composed of representatives of each stakeholder group. We envision this group will meet quarterly to monitor ongoing progress of the initiative and offer feedback. The action committee will consist of diverse internal stakeholders to serve as a conduit between the advisory committee, HCPS leadership, and all internal stakeholders. We suggest this group meet monthly to drive ongoing improvement to the initiative and communicate progress. Together, the committees will drive the cycle of evaluation and continual improvement, helping to decentralize and distribute some logistical adjustments, and providing connection to and among all stakeholders.

**Rationale**

This recommendation builds on the culture of collaboration within the division. Their collaborative culture is demonstrated through the planning and early implementation of the balanced calendar initiative. As highlighted in the first chapter, HCPS collaborated with a variety of stakeholders during the initial phases of planning the balanced calendar and through the development of intersession course structure. However, our analysis revealed a need for an organized, ongoing process to sustain stakeholder engagement as the balanced calendar shifts from planning to implementation. The proposed committee structures would provide a defined process for HCPS leadership to solicit feedback from its stakeholders, and for stakeholders to offer feedback.

Further, the body of research on building evaluation plans showed that stakeholders must have the opportunity to articulate their understanding of what steps or actions must take place for

goals to be met, as well as assumptions identified and addressed, and why. While we heard from focus groups an understanding of the larger purpose behind the balanced calendar initiative, we did not hear of an ongoing, clear method for providing input. We also gleaned that virtually all logistical work for evaluation of the balanced calendar thus far has been completed by just a few people. In our focus groups, we heard that some logistical challenges in the first intersessions might have been avoided had there been opportunities for diverse stakeholder teams to review plans in the context of each school and grade level.

### **Suggested Steps**

The action and advisory committees will drive improvement and communicate progress. Through the collaborative committee structure, the perspectives, knowledge, and experiences of representative stakeholders will inform the ongoing evaluation and planning of the balanced calendar and intersessions. This structure will also ensure that HCPS can capitalize on its strengths of strong leadership and existing culture of collaboration.

### **Benefits**

In our focus groups, we found that stakeholders felt student and teacher input was crucial to the balanced calendar initiative at the current and future stages, and that input from families and other stakeholders was also valued. With regard to student voice, some stakeholders emphasized the importance of identifying developmentally appropriate modes with which to gather the voices of young students, students with disabilities, as well as students with language barriers. For initiatives and change to endure, there must be a shared understanding of the purpose of the initiative amongst stakeholders, as well as clear alignment between the goals, actions being taken in order to achieve those goals, and expected results. We found that stakeholders are both enthusiastic about the balanced calendar initiative and eager to know the

impact of their questions, requests, feedback, and input. The advisory and action committees will play an active role in the evaluation process; all other recommendations relate directly to the evaluation process through actions that these two committees can take.

### **Recommendation 2: Review and Update the Theory of Change and Logic Model**

The next step in the evaluation cycle is to drive the continuous improvement of the balanced calendar initiative. We recommend that stakeholders, represented by the action committee, carefully review the TOC and logic model on an annual basis. This review should focus on the alignment between the goals and actions for change indicated on the TOC. If misalignment is found, the action committee will update the TOC and communicate the iterative changes to the advisory committee.

### **Rationale**

We learned through our review of the literature that the TOC and logic model must be well-articulated to help build understanding and consensus about what the initiative is trying to accomplish and why. A TOC must continuously evolve, with shared stakeholder input and understanding, addressing any misalignment between goals, actions, and measurement. Thus, in our problem analysis phase of work, our team created a TOC and logic model for HCPS centered on the balanced calendar initiative and intersessions. Early interviews shaped the TOC, and our partner's input helped us prepare a draft that would be ready for stakeholder feedback in our data collection. We shared our draft TOC and logic model with four division leaders; each person affirmed that both models accurately captured the initiative. Additionally, each indicated they saw value in the process of creating a TOC and logic model. However, in listening to other stakeholders, we identified gaps in understanding of some division actions and policies surrounding the initiative. Additionally, we heard concern about sustainability of the initiative as

natural matriculation replaces staff familiar with the initial purpose behind initiative with new stakeholders who do not understand the why behind the components of the balanced calendar and intersessions. Understanding how specific actions contribute to achieving desired goals can help address the gaps in understanding and engagement that can derail an initiative.

### **Suggested Steps**

Our partner, through the action committee created as part of our first recommendation, should engage stakeholders in an authentic, structured process to create or adapt the draft TOC and logic model for the balanced calendar initiative. As part of this process, members of both the advisory and action committees should ensure understanding and alignment of the goals, actions, steps, desired results, and methods of measurement, reviewing the models on an annual basis. The action committee will adjust the TOC and logic model as necessary and update the advisory committee.

### **Benefits**

A clearly defined TOC and logic model enable the identification of types of evaluations that align with the program's purpose. Moreover, they provide opportunities for stakeholders to clarify their understanding of what goals are met and identify underlying assumptions about whether the actions planned connect to the desired outcomes. The work of creating and revising a TOC and logic model is crucial to sustainable continuous improvement of the intersessions and balanced calendar initiative. Through this review, gaps in understanding will become evident, providing opportunities to explore those gaps and reconcile them. The clearly defined alignment of each action to the goals and intended outcomes of the initiative identified by the TOC lays the groundwork for valid and reliable measurement in which stakeholders can participate.

### **Recommendation 3: Select Reliable Data Sources that Align with the Goals of the Balanced Calendar**

Attention to the data collected and sources of data is crucial for effective evaluation efforts. We recommend ensuring valid and reliable data sources aligned to the goals outlined in the TOC. Several of the steps of our evaluation plan are encompassed in this recommendation: determining the types and timing of evaluation, generating evaluation questions, and identifying data collection methods. Each of these must have a clearly articulated connection to the TOC. Recognizing that the TOC may change with each review cycle, the assessment tools used must also be reviewed to ensure continued alignment. This may include questions on surveys, the timing of when surveys are distributed, the method of distribution, and the intended audience or group of stakeholders. The evaluation process is separated into three phases over the first five years of implementation of the balance calendar initiative.

#### **Rationale**

Our review of the literature illustrated a key focus: alignment between the purpose of the program and its evaluation (W. K. Kellogg, 2017). Through the literature, we identified how essential it is to have clear alignment and understanding of the guiding TOC to avoid working under unidentified assumptions that will not yield the desired results. Part of this process is determining types of evaluations that align with the initiative's purpose and timeframe.

In our focus groups, we heard a sense of frustration surrounding surveys distributed to students and staff in the early phases of the first balanced calendar year. Concerns included length, frequency, and developmental appropriateness for some students. The goals HCPS had identified did not align with what was being asked in the surveys. In addition, the design and distribution of the surveys were not consistent with producing valid and reliable data. Further,

multiple respondents felt there was not a way to provide feedback that was not specifically requested. Stakeholders distinguished between the initial planning stages, where there was a sense of genuine interest in stakeholder feedback and what was being experienced after the first phase of implementation, after the first intersession, when we collected our data.

Our team recognized that multiple aspects needed to be addressed through structures that guaranteed group decision making, curated data gathering opportunities and processes, and ensured alignment to the goals of the balanced calendar and intersessions. Our review of HCPS documents revealed misalignment of survey questions and the initiative's goals and timing. Through the focus groups, we learned that logistical friction can negatively impact an initiative in multiple ways and that it is not possible to fully understand the context of every environment or location of intersession courses without input from those closest to the context. We also found that a clearer connection and understanding of evaluation measures, especially surveys, was desired. Moreover, we learned that evaluation measures that were developmentally appropriate and user-friendly were preferred. We also found that stakeholders wanted to understand the decision-making process and have responses to the feedback they provided. Respondents indicated a combination of frustration over logistical issues and appreciation for positive student experiences and outcomes.

### **Suggested Steps**

An assessment matrix by implementation phase is part of the evaluation plan located in Appendix M. This matrix provides guidelines and suggestions for the types of evaluation and instruments HCPS should use. It also shows how each type of evaluation aligns to the balanced calendar goals and desired outcomes. As with all of our recommendations, the advisory and action committees will play critical roles in refining the evaluation matrix. The Advisory

Committee can work to ensure validity, reliability, accessibility, and student privacy protections, as well as alignment between goals and assessments, attending to the timing and methods of assessment to achieve actionable results.

HCPS should use a variety of metrics that include measures that meet both the state grant requirements and interests of stakeholders. Feedback loops and other improvement measures are essential. HCPS can build effective and efficient mechanisms for soliciting and responding to stakeholder feedback. It is important to incorporate methods that not only collect, but encourage, candid feedback. The feedback loops should include measures that specially address logistical and operational issues and should be included in surveys and other modes to parents and all staff, including teachers, assistants, custodians, etc. Attention must be paid to what different stakeholders value, including students, parents, educators, and community members, as well as state and local oversight bodies.

### **Benefits**

Assessments aligned to the TOC should yield reliable and valid data that provide insight into how students are impacted by the balanced calendar initiative. Moreover, identifying the multitude of assessments administered as part of state and federal accreditation requirements and how each, or portions of each, aligns to the TOC can increase efficiency and avoid over assessment of students. For assessments such as surveys, which are not required for accreditation, the action and advisory committees can generate questions and prompts that focus on the evaluation stage and the component being assessed. Moreover, the chosen instruments can be adjusted to meet stakeholder needs and preferences yet still align to the TOC and parallel instruments targeting other stakeholder groups.

#### **Recommendation 4: Create and Publicize an Evaluation Timeline for each Phase of the Balanced Calendar**

To fulfill the continuous communication and stakeholder engagement components of the evaluation cycle, the HCPS evaluation plan should include an evaluation timeline that the division can use to guide them in administering the evaluation measures and in communicating to the public when to anticipate results. The evaluation timeline provides a roadmap for when to implement formative, performance monitoring, and summative measures to assess the success of the balanced calendar initiative.

#### **Rationale**

From the literature, we found that high-quality evaluation and effectively communicating the results of evaluation to stakeholders are both necessary to sustain an initiative. Setting stakeholders' expectations on when to expect evaluation results is an integral component of this process. Additionally, stakeholders need help to understand not only what results are, but the purpose of the assessment generating the results.

The literature also tells us about the types of evaluation HCPS should use and when, based on suggested timing and stakeholders' general expectations for results. Our key learnings about the three main types, formative, performance monitoring, and summative, informed our recommendation for the timing of each phase. By clearly outlining the phases, including the reasoning behind the measures that fall within each phase, HCPS can set stakeholder expectations as they gather data to inform their self-evaluation. It is important to note that our suggestions are not exact timelines but instead suggestions in order to allow HCPS to make adjustments through the advisory and action structures.

From the literature, we confirmed the evaluation and implementation of new initiatives, which are encompassed by change management, is an ongoing process, with outcomes that may not be realized for many years. The literature also provided theory and best practices about the importance of aligning stakeholder groups with communication styles. Therefore, we included prompts to elicit what type of results would be the most impactful on stakeholders as well as suggestions about how best to communicate those results in our interviews and focus groups. Without exception, stakeholders identified that evaluation of the results of the initiative will take longer because of the ongoing impacts of the COVID-19 pandemic. While the length of delay varied, there was agreement about the compounding of challenges that were exasperated by the pandemic. The insights gained through these questions, combined with what we learned from the literature, led us to recommend an explicit evaluation timeline. We suggest three phases for evaluation, each of which addresses what, when, how, and to whom to communicate results, at each phase of the balanced calendar implementation, which is outlined as part of the evaluation plan found in Appendix L.

We heard that stakeholders were eager for initial updates and stories about the first set of intersessions, but that there was a universal understanding that impacts will not be immediate. Mr. Davis and Dr. Hackney emphasized that while the true impact cannot be measured in the short term, there are internal and external audiences who will be looking closely at SOL test results as an indication of success. Such expectations need to be recalibrated as summative results are not likely to be impacted by the initiative in the first year of implementation. The interest in the implementation year of the balanced calendar extends beyond HCPS to include other school divisions, the Virginia Department of Education, and the General Assembly. Other

divisions are in close contact with HCPS as they explore similar initiatives in their divisions; state governing bodies provide funding and require status updates at all stages.

There will be short term, midterm, and long-term impacts of the balanced calendar and intersessions that should be shared with stakeholders. Stakeholders acknowledged that some results will not be realized for several years. Stakeholders' definition of success for the initiative varied, as did what factors and how to measure those factors, and on what timeline. Stakeholders shared that they are not just interested in positive reports, but also what shifts were made to address inevitable challenges and problems as they arise. Stakeholders agreed that the impact of the balanced calendar was important to measure, but how and exactly what to measure varied by stakeholder interests and perspectives. Stakeholders are particularly interested in students' perspectives of their experiences and how they are impacted through the balanced calendar and participating in intersessions.

### **Suggested Steps**

We recommend HCPS determine and publish a tiered timeline that outlines the assessments and measures chosen to evaluate the balanced calendar initiative by each phase, clearly communicating the length of time each phase lasts. The formative phase begins prior to implementation when operational plans begin (year zero) and realistically continue through the third year. We recommend progress monitoring begin in the second year of full implementation and continue throughout the life of the initiative. Summative evaluation of the success of the balanced calendar initiative will begin in year five and will also continue. Both progress monitoring and summative evaluation measures will be an ongoing part of the iterative improvement cycles. We chose to extend each phase based on consistent acknowledgment from our interviews and focus group participants of the ongoing and unknown impacts due to COVID-

19. While these specific challenges were universally faced by school divisions during the 2021-2022 academic year, it is not possible to determine their impact on the first year of implementation of the balanced calendar. Such measures, if connected to the balanced calendar initiative, will be misleading and potentially damaging to the initiative.

Within the published timeline, HCPS should build effective mechanisms in the evaluation plan for soliciting and responding to stakeholder feedback about the initiative itself as it progresses. Acknowledging that adaptations will be required, the timeline can include designated places for HCPS to share the learning that leads to such adjustments.

### **Benefits**

A timeline accompanied by these supporting strategies will help ensure alignment to the evaluation plan and provide HCPS with the time it needs to adjust and learn. By establishing and publishing a three-phase evaluation timeline, HCPS can set stakeholder expectations and address unrealistic requests for results that may not be feasible. Additionally, HCPS is able to hold itself accountable to ensure their actions remain aligned to the goals of the initiative and provides a structure to review and adapt. By identifying opportunities for stakeholder input as part of the timeline, HCPS can proactively address stakeholder concerns about results, and maintain or increase stakeholder engagement.

### **Recommendation 5: Iterate Balanced Calendar Innovations through Improvement Cycles**

We recommend that HCPS fulfill the critical evaluation step of implementing improvement cycles. This is the essential component of the evaluation plan upon which other components depend; improvement is not a single action, but an ongoing process. The PDSA cycle incorporates all previous recommendations and ensures that stakeholders have the information needed to improve and continue to move forward.

**Rationale**

In practitioner and academic literature, we saw that reciprocal relationships with structured opportunities for feedback loops are essential to truly engage in sustainable continuous improvement. Through the literature, we learned about the Deming Cycle, or Plan-Do-Study-Act (PDSA) cycle, and the Kaizen Model, as the dominant tools for educational improvement. Throughout all interviews and focus groups, stakeholders emphasized the desire to ensure what is best for students, including overall improvement in education and student outcomes. Our interviews and focus groups were conducted after the first set of intersessions; given this context, we were not surprised to hear a combination of concerns and affirmations. The concerns that were expressed were centered on logistical challenges and long-term sustainability of the initiative. Affirmations were shared through stories of students and teachers having great experiences and enthusiasm about the prospects of the initiative as it progresses.

**Suggested Steps**

We suggest that HCPS implement iterative improvement cycles, such as the Deming Cycle or Plan-Do-Study-Act (PDSA) cycle driven by the advisory and action committees and guided by staff input. The cycles should include feedback loops and other continuous improvement measures to assess the iterative improvement of areas of concern.

A critical component of this cycle is the review and revision of the TOC and logic model to ensure continued alignment to the goals of the initiative as well as allow for adjustment guided by the context and continued progress of the initiative. External conditions may shift and impact the operation or progress of the balanced calendar initiative. Each of the steps of the evaluation process should be revisited as part of the iterative improvement cycles.

The structure for planning intersession courses and conducting project tunings for intersession courses is an example of a PDSA cycle. HCPS has used similar processes for planning and execution of the balanced calendar, as evidenced through our document review. HCPS can apply such structures to the overall evaluation plan to make improvement responses to feedback and evaluation results a consistent part of the intersession course planning.

### **Benefits**

Interactive improvement cycles provide a method to include stakeholders and address changing circumstances and demands impacting the balanced calendar and intersessions. The structure of improvement cycles will provide documentation of the adaptations, shifts, and improvements that are part of the evaluation of the balanced calendar initiative, allowing for additional reflection. By implementing a structure for identifying areas to amplify success and areas in need of improvement, HCPS will be poised to respond and adapt to continuously improve the balanced calendar and intersession experience for stakeholders.

### **Recommendation 6: Showcase Early Wins**

Sharing early wins will engage stakeholders and broaden buy-in and support for the initiative. Using the steps and products within the evaluation plan, HCPS should demonstrate the value of the balanced calendar to the community early and often through demonstrations showcasing student stories and showing improvement.

### **Rationale**

Given the length of time required to obtain and share valid and reliable evaluative measures, even in the formative phase, quick wins can keep stakeholders engaged when data is not yet available. Assessments are identified to measure the balanced calendar initiative as part of the third recommendation, and the timeline for sharing the results of those assessments is

determined as part of the fourth recommendation. However, internal and external stakeholders are eager for information about the implementation and progress of the balanced calendar initiative. In our focus groups and interviews, participants shared multiple positive stories about how individual students, educators, and families were experiencing the first months of the balanced calendar and first intersessions. HCPS can collect and curate such stories and testimonials, or quick wins, at any time to share internally and externally.

We found that stakeholders want to hear personal stories about how teachers and staff are impacted. Stakeholders expressed curiosity about how reallocating the calendar impacted the families of students and staff. We found that specific stories involving students that were focused on student experiences of joyful and meaningful learning were the most impactful and desired. We also found that when intersessions classes, teachers, or students were featured in a division Tweet, other teachers wanted to have their classes featured also. They also indicated that the most impactful results are about students' experiences and potential shifts in the trajectories of their lives through possibly career-expanding enrichment and opportunities offered through intersessions.

### **Suggested Steps**

We recommend that HCPS, with the assistance of one or both of the committees, collect and curate stories and artifacts about student, teacher, staff, and family experiences related to the balanced calendar and intersessions. The stories and artifacts selected should align with or exemplify the goals in the TOC and logic model. HCPS could consider a structure for soliciting stakeholder input or facilitating reciprocal communication as a part of this scheduled communication. As part of the curation of which *quick wins* to feature, attention should be paid to ensure all stakeholder groups, schools, and grade levels are represented. Differentiating what

is shared to meet the preferences of instrumental, conceptual, and strategic stakeholders may be an additional step HCPS could consider. HCPS can share the student and teacher testimonials via existing social media platforms, arrange for student presentations for community organizations, and connect with local media outlets as public interest stories.

### **Benefits**

Sharing student achievement and student engagement data through direct experiences from both students and teachers will strengthen community support. It will take varying amounts of time to realize the benefits and impacts of the balanced calendar initiative. However, internal and external stakeholders want to know more, and they want to know as soon as possible. Community and stakeholder engagement will maintain current levels or increase with the consistent sharing of teacher and student experiences, framed as quick wins. Moreover, the process of sharing quick wins provides a transparent method for HCPS to share the progress of the balanced calendar initiative while other measures are evaluated.

### **Recommendation 7: Tailor Communication to Intended Audiences and Consider a**

#### **Data Dashboard**

Our analysis points to the need to align communication with stakeholder groups consuming the information. Thus, HCPS should build relationships with their diverse stakeholder audiences through tailored communication strategies that are accessible and targeted by stakeholders' preferred language and communication channel. The purpose behind each communication, identifying whether it is one-way or reciprocal, as well as the intended audience must be identified. The timing, frequency, method, and content of each communication should align with the purpose and intended audience. In the literature, we learned there are three different audiences for the evaluation plan: instrumental, conceptual, and strategic users.

Instrumental users include internal audiences such as students, staff, and administration who are directly involved in school operations and the balanced calendar initiative. Conceptual audiences are external, but have connections to school operations and may be impacted by the initiative such as families of students and local businesses or community organizations. Strategic audiences are connected through interest in the initiative or are involved vis a vis policy or governance.

A data dashboard provides a platform to communicate growth and improvement toward goals to internal or external audiences. Effective use of this tool depends on multiple factors, some of which are beyond the control of HCPS, such as external stakeholders' access to the internet and devices with adequate screen size.

### **Rationale**

The literature underscores the importance of communication in building a sense of connectedness among stakeholders to HCPS and to evaluation of the initiative. Strategic communication is reciprocal, providing an opportunity for stakeholder participation, and not seen as a single-direction transfer of information. Our review revealed gaps in alignment between HCPS assessments and communication that we address in the evaluation plan. We found that stakeholders want families, staff, and students to have access to information about the balanced calendar and its outcomes. The potential inconsistencies in what, how, and when information is distributed was a source of frustration. Stakeholders want to know how the initiative is progressing and would like to know about results as they become available, yet some focus group participants expressed concern about a perceived abundance of surveys, some of which were not aligned to the needs of the intended respondents. We also heard from some respondents that some groups, including linguistically diverse families and those with less access to home

computers, may not have access to all information needed, specifically concerning registration for intersession courses and other logistical information.

### **Suggested Steps**

Communication about the balanced calendar and its outcomes should be tailored to the intended audience, attending to language, accessibility, and mode or platform preferences. To reach multiple audiences with the same message, multiple methods may need to be used. In addition to sharing early and small wins, HCPS should use ongoing communications, based on the timeline of appropriate evaluations, to share evaluation information about the balanced calendar. Such communication can include student achievement and student engagement data, as well as student and teacher testimonials. HCPS can also leverage in-person events to build relationships and strengthen the sense of connection.

The evaluation plan should have effective mechanisms for soliciting and responding to stakeholder feedback. This provides a way to monitor the trust and support stakeholders have for the initiative. All stakeholders should have access to HCPS communication regarding the evaluation plan. Communications regarding the evaluation of the balanced calendar initiative should fit the needs and expectations of stakeholders. HCPS must ensure information is shared via accessible modes of communication and in languages spoken by all stakeholders.

Data dashboards can be an effective tool for communicating results that allow users to select and sort information by different domains. Considerations for use of a data dashboard include logistical aspects such as the type of device being used to access the dashboard and adequate internet access when determining who intended audiences are for the dashboard.

## **Benefits**

Each audience or stakeholder group has different interests in the initiative. By identifying which stakeholder group or audience a person falls within, communication and engagement strategies can be tailored to fit the need or goal. This avoids unproductive effort to share information that is unlikely to be wanted or needed, and even potentially confusing to stakeholders, resulting in disengagement. Targeted, effective communication increases engagement, and therefore the sense of connection that creates enduring buy-in and support.

Designing a dashboard to align to the evaluation cycle and plan will also help ensure that HCPS does not overwhelm and potentially alienate stakeholders. However, foremost in the decision-making about using a dashboard should be aligning the information different stakeholders want to know with the goals of improving and building support for the balanced calendar.

## **Conclusion**

When we started this capstone, we used the metaphor of HCPS setting sail on a daring journey through its implementation of the balanced calendar and intersession courses. Through our work, we can see how the years of planning prepared HCPS to face the sometimes-rough seas they have encountered since launching in July 2021 through March 2022. Through this unique and innovative approach, and with the courage and commitment to undertake something no other Virginia school division has done, students, families, and staff are already enjoying the benefits of the redistributed calendar.

We feel it is important to acknowledge the timing within the first year of full implementation on which our findings, and therefore recommendations, are based. Our interviews and focus groups occurred shortly after the first set of intersessions, early in the

second quarter of the school year. At that time, the academic year, the first in which many students returned to in-person instruction for the first time in well over one year, was between one-fourth and one-third complete, with the majority of the year still ahead. Thus, we recognize that the context of the timing of our work may impact the full understanding of the balanced calendar initiative. Moreover, with teachers and staff specifically, a disproportionate amount of attention may be focused on logistical concerns that would be addressed and resolved prior to subsequent intersessions. Many participants acknowledged that our analysis was early in the implementation process and as such, unforeseeable challenges such as those discussed are a natural part of any new initiative.

### **How will these Recommendations Inform the HCPS Evaluation Process?**

The evaluation process, informed by the steps we have recommended, will help HCPS to explicitly align their purpose, desired outcomes, and actions, to how it measures success of the balanced calendar initiative and identifies areas for improvement. Each of the recommended steps: activating advisory and action committees; reviewing and updating the TOC; selecting reliable data sources that align with the goals of the balanced calendar; creating and publicizing an evaluation timeline for each phase; implementing improvement cycles; showcasing early wins; and tailoring communications for different audiences; plays a crucial role in successful evaluation and must include processes for authentically engaging stakeholders through strategic communication. These steps also allow HCPS to leverage components of effective change management revealed in the literature and confirmed in our analyses.

HCPS has ambitious goals and the talent and perseverance to achieve those goals, but needed help to capture the full impact of the balanced calendar over time. Our evaluation plan will help HCPS draw conclusions about the initiative's effectiveness, impact, and outcomes, as

well as allow HCPS to continue to innovate and adapt to meet the needs of its students, families, and educators.

The balanced calendar initiative impacts every school, teacher, student, and family in the City of Hopewell. Given this wide-reaching impact, ongoing evaluation informed by stakeholder input is essential for the success of students as well as the initiative. We believe the process and products of the balanced calendar capstone, including a comprehensive evaluation plan built on these recommendations, will prove beneficial to HCPS as they venture further into their journey. Using the evaluation plan as part of a collaborative process will position HCPS to serve as a lighthouse, marking a channel for improvement for other divisions in the state and even the nation. The Capstone 2022 team is grateful for the opportunity to be of service to the bold HCPS team and its worthy community.

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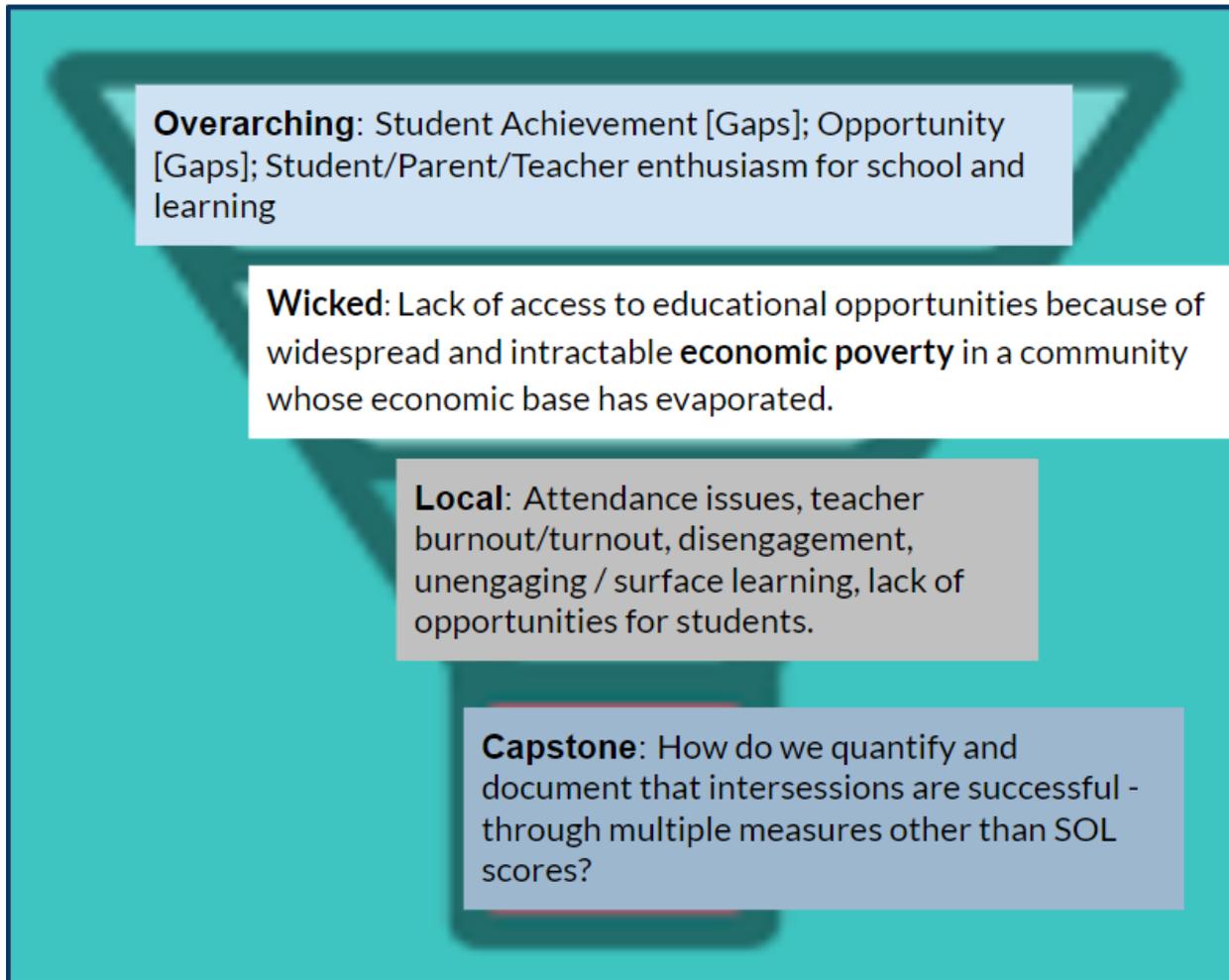
## Appendix A

### Key Dates in Capstone 2022 Development

2020-2021	Capstone 2021 team completes first VCU capstone; HCPS Delays launch of balanced calendar one academic year
4/26/2021	Members of Capstone 2022 attend Capstone 2021's Defense
5/16/2021	First in-person team day-long meeting to complete team covenant and goals
6/17/2021	First meeting with partner from HCPS to discuss RFA
6/18/- 8/1/2021	Team designs mock data dashboards for HCPS as a potential client deliverable
7/25/2021	Second In-person team meeting to synthesize and refine a theory of change
7/26/2021	HCPS schools opening day for the 2021-2022 academic year
8/16/2021	Second meeting with HCPS partner to present the theory of change and clarify the RFA
8/19/2021	HCPS closed due to staffing shortages related to quarantining caused by COVID-19 Delta variant
9/2/2021	Third meeting with HCPS partner to share response to RFA, share draft TOC, logic model, and mock data dashboards
9/27/2021	First HCPS week of intersessions implemented
10/08/2021	Three Capstone 2022 members visit the second week of intersessions as HCPS guests
10/14/2021	Capstone Team Prospectus Hearing with committee
10/20/2021	Fourth meeting with HCPS partner to determine how best to invite interview and focus group participants
11/1- 11/19/2021	HCPS staff interview and focus groups completed
11/10- 12/17/2021	Clean and code HCPS staff interview and focus group transcripts
1/10/2022	Family focus groups completed
1/11- 1/17/2022	Clean and code family focus group transcripts
1/10- 2/17/2021	Analyze interview and focus group data
4/21/2022	Capstone defense presentation to committee
4/28/2022	Capstone presentation of evaluation plan deliverable to partner

## Appendix B

### Defining the Problem of Practice using the Funnel Analysis Diagram



## Appendix C

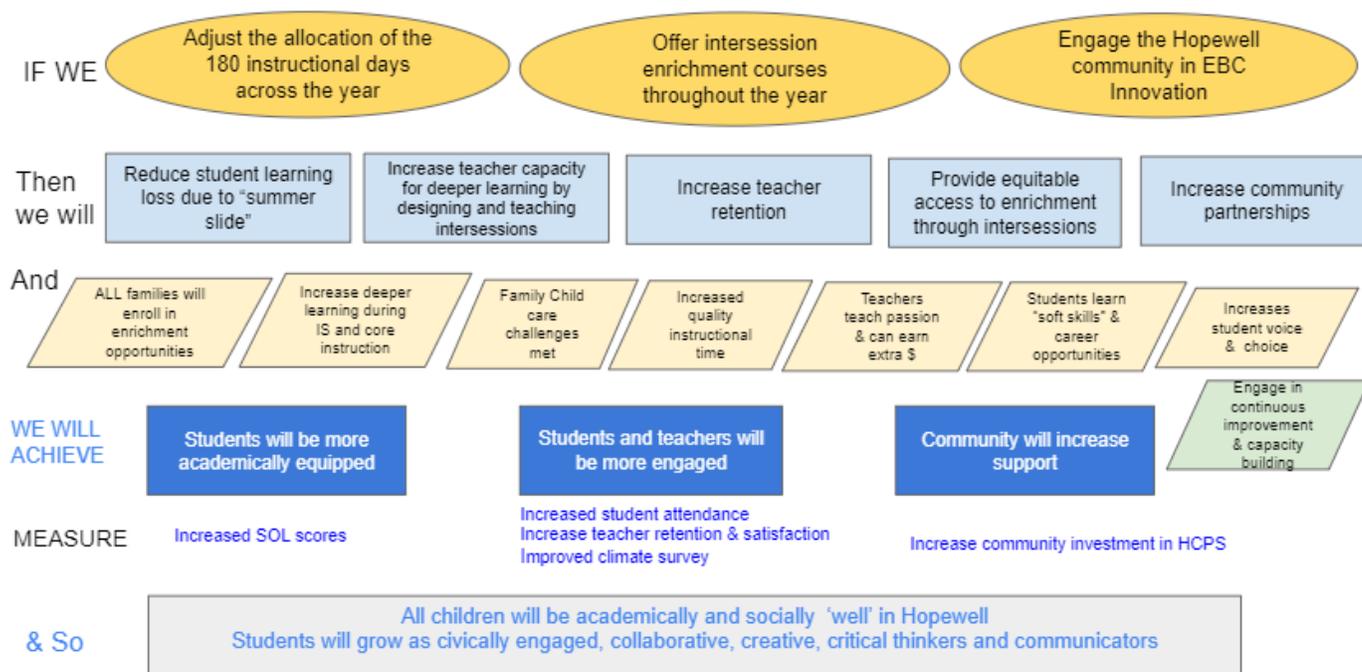
### Using the 5 Why Protocol to Understand the Problem of Practice 1.0

CONTEXT	The students of Hopewell are not performing well on standardized tests, have a high rate of absenteeism, and are not indicating high engagement on school climate survey thus HCPS schools are 'In Improvement' and in danger of school take-over.
Why?	<p data-bbox="381 506 1333 552">WHAT IS HCPS EXPERIENCING / CONCERNED ABOUT RIGHT NOW</p> <p data-bbox="365 573 1369 667">HCPS is concerned about how to ensure participation, demonstrate effectiveness and generate teacher, student and community buy-in for their initial year of their enriched balanced calendar</p>
Why?	HCPS wants the community to participate in and support the program, wants the program to be effective and demonstrate success to all stakeholders so they can maintain funding with grant and beyond.
Why?	HCPS wants the program to grow and improve to positively impact more students and families and their school district.
Why?	HCPS wants recommendations on how to structure and improve intersession courses. HCPS wants Hopewell to thrive and for all the children to be 'well.'

## Appendix D

### Theory of Change for HCPS 1.0

#### HOPEWELL BALANCED CALENDAR



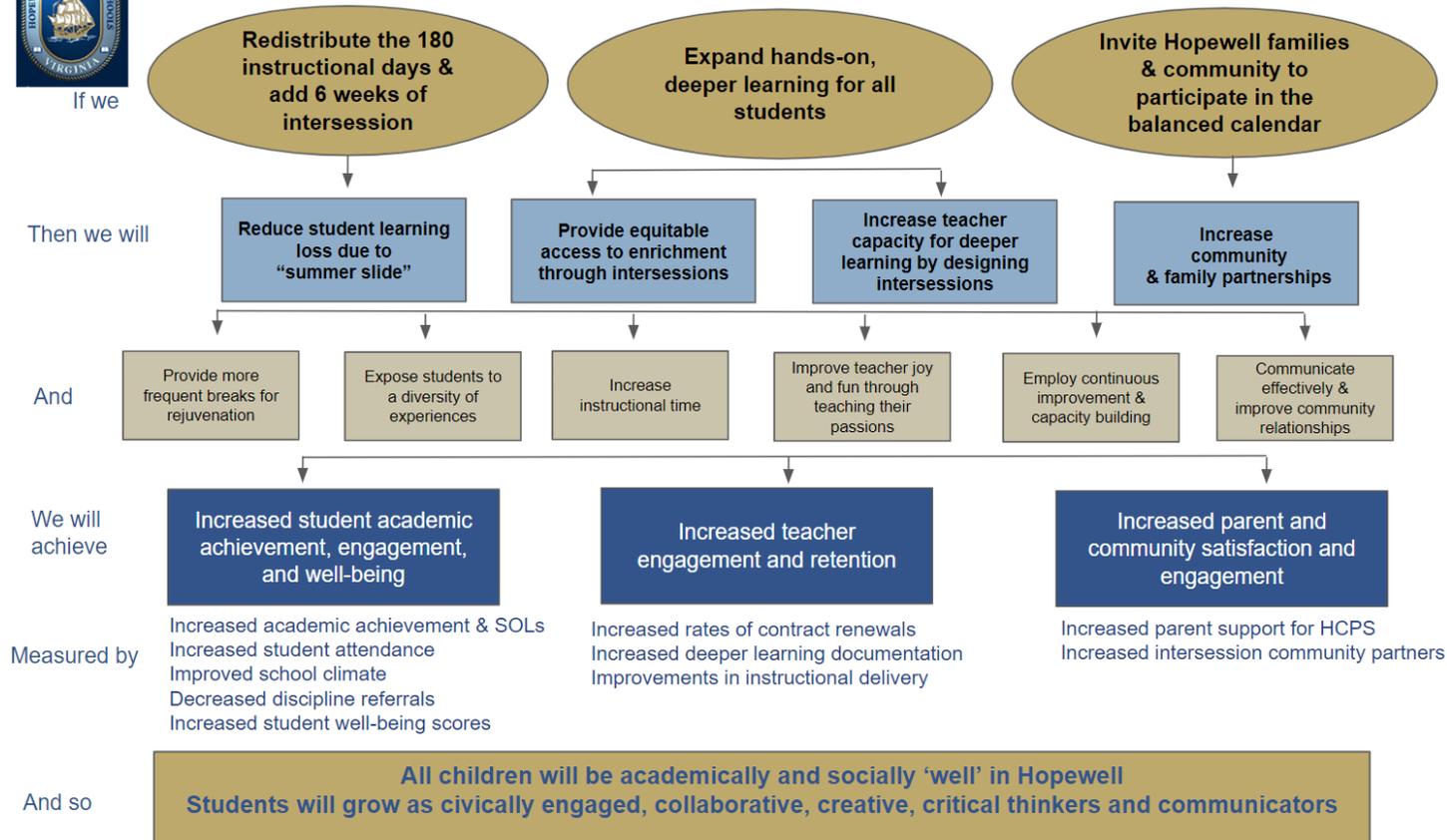
## Appendix E

### Theory of Change for HCPS 3.0



If we

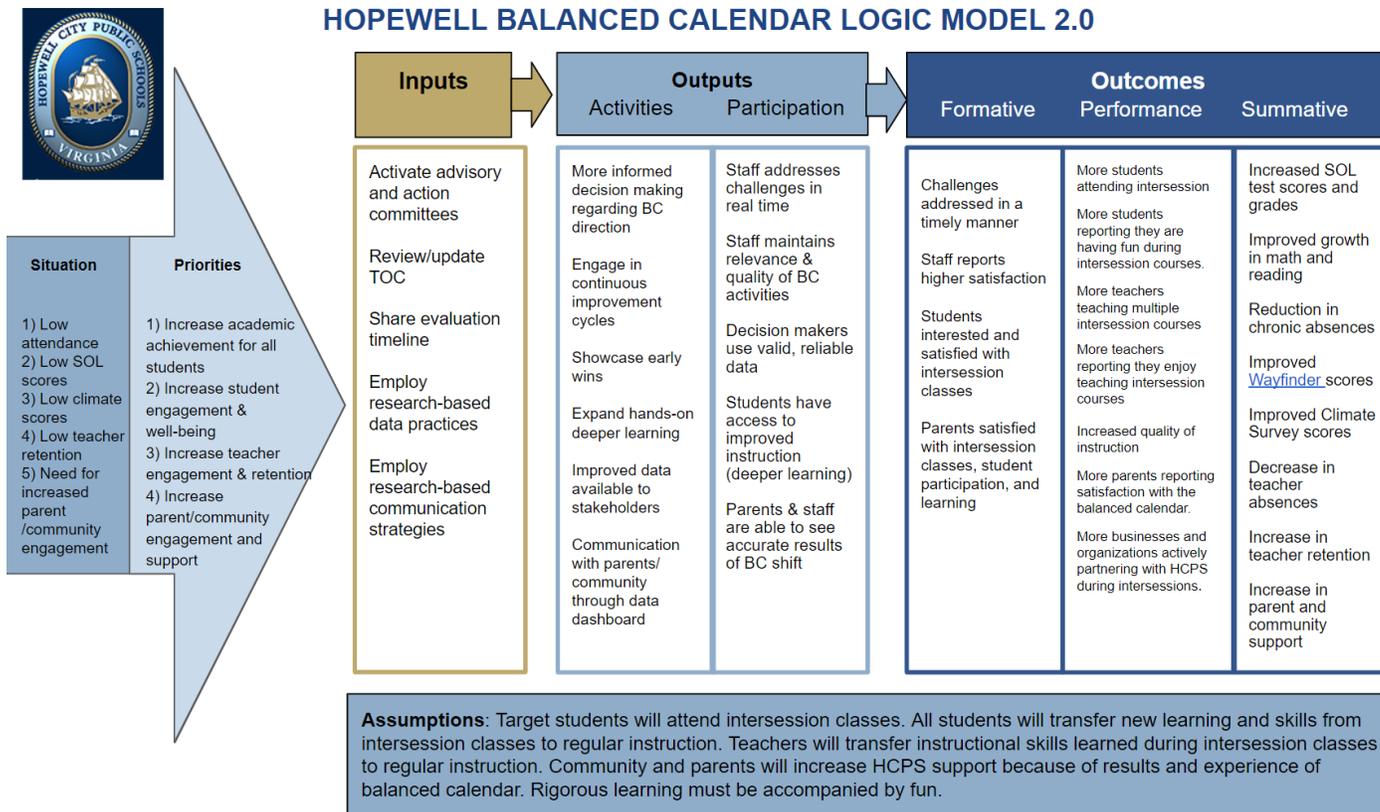
#### HOPEWELL BALANCED CALENDAR THEORY OF CHANGE 3.0



## Appendix F

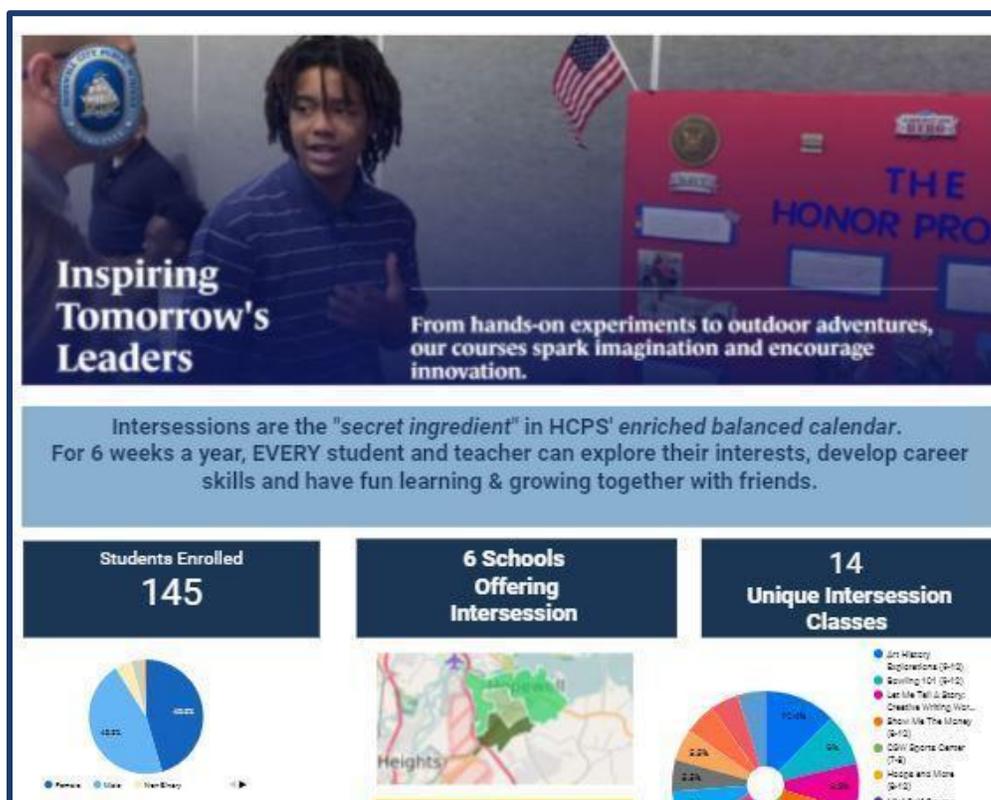
### Logic Model for the Balanced Calendar

#### HOPEWELL BALANCED CALENDAR LOGIC MODEL 2.0



### Appendix G

#### Prototype Data Dashboard 1: Intercession Interactive Data Dashboard [link here](#)



#### Prototype 2: HCPS Accountability Summative Data Interactive Dashboard [link here](#)



## Appendix H

### Interview Protocol

**Time of Interview:**

**Date:**

**Interview Participant:**

---

My name is \_\_\_\_\_, and this is my teammate \_\_\_\_\_, We are doctoral students in Education Leadership at Virginia Commonwealth University and are members of a capstone team of 5 doctoral students. For our capstone (dissertation in practice), we are conducting an organizational improvement study with the goal of creating a comprehensive evaluation plan for Hopewell City Schools' balanced calendar initiative. This study focuses on the essential components of an evaluation plan for HCPS, how the evaluation plan can drive improvement, and how an evaluation plan can strengthen support of the initiative.

Thank you so much for making time to share your thoughts with us.

Our Zoom session will be recorded for research purposes, but will not be shared with anyone outside of this project. [if applicable: *As a backup, I am also recording on \_\_\_\_ device*]. The recording will be transcribed, and the research group will compile and analyze the results. Once the study is completed, we will erase the video and audio recordings.

Do I have your permission to record this interview/focus group? (wait for response)

(Start Recording)

Before we begin, I must review some consent information with you.

Please ask me to clarify anything that is unclear.

***Purpose and Procedures:*** You are invited to participate in a study to share your thoughts about an evaluation plan for the balanced calendar initiative. Your insights will inform the development of an evaluation plan created by our team. One of the aims of the evaluation plan is to contribute to continuous improvement of the balanced calendar initiative.

If you agree to participate, I will ask you some questions about components of an evaluation plan for the balanced calendar initiative, about how the evaluation plan can be used to drive improvement, and how the evaluation plan could be used to strengthen support of the initiative. This interview will take approximately 45-60 minutes

***Voluntary Participation:*** Your participation is voluntary. You may choose not to participate in this focus group/ interview, stop the focus group/ interview at any time, or skip any questions.

**Confidentiality Protections:** Information that you share with me will be used for our report. Only the study team and our professor will have access to the transcriptions of this interview. Although the final report is public, we will destroy the interview material after we submit the study. Names will only be used with permission in our analysis and findings.

Once the study has been completed, the report will be available from VCU at Scholar's Compass.

Do you have any questions about this study?

Do you consent to participate in this interview?

YES – CONDUCT INTERVIEW

NO – Thank you for your time.

As we ask questions, please do not hesitate to speak up whenever something seems unclear or is hard to answer. There are no right or wrong answers.

**Before we begin, please share your role with HCPS and your role with the balanced calendar initiative.**

First, we are going to ask a few questions focused on what you believe are essential components that should be included in an evaluation plan for the balanced calendar (Research Question 1: What are the essential components of a quality comprehensive evaluation plan for the HCPS balanced calendar initiative?)

1 From your perspective, what are the goals of the balanced calendar?

- What will the balanced calendar achieve? (possible reframe)

2. What are the most important actions HCPS can take to achieve the goals of the balanced calendar?

3. How would you suggest the success of the balanced calendar be measured?

- What would be your key indicators that the BC was successful? (*Follow up if needed: voice & choice, soft skills, career opportunities, deeper learning, fun*)(possible reframe)

4. What external factors might interfere with the balanced calendar initiative reaching its goals?

5. What internal factors might interfere with the balanced calendar initiative from reaching its goals?

INTRODUCE THE THEORY OF CHANGE

After our research team read HCPS documents we drafted a theory of change, or a roadmap for the balanced calendar. This draft theory of change visually represents the inputs, actions, and expected outcomes of the balanced calendar as our team understands them today.

Your input will help us improve this roadmap. Let me share this draft with you and then ask you some follow up questions about the diagram.

(show the Theory of Change line by line, prompting questions from #6 with each line)

6. *At each level- please offer your feedback on whether*

This shows your understanding, if there are missing components, or are there are things that you don't agree with

7. What do you believe would be the most important things to include in a comprehensive evaluation plan for the HCPS balanced calendar initiative?

Now we are going to talk about how the evaluation plan could drive improvement of the balanced calendar initiative.

(Research Question 2: How can the balanced calendar evaluation plan drive improvement within the division?)

8. What is a reasonable timeline for measuring the success of the balanced calendar?

9. What data or information do you believe would be beneficial to make improvements to the balanced calendar initiative?

- *If no response, consider prompts such as improving over time*

10. Please describe the current collaboration practices in HCPS for teachers, administrators and central office staff to improve instruction.

11. What are the biggest areas of concern you have about the balanced calendar for the coming year, two years, five years?

We are going to end with a few questions about how the evaluation plan can be used to strengthen support of the BC initiative within the larger community.

(Research Question 3: How can HCPS use the evaluation plan to strengthen support for the balanced calendar initiative in the larger community?)

12. What results of the balanced calendar are most important to share with the community?

- If you had to choose, would you prioritize sharing student academic outcomes or other kinds of information about student experiences?
- What outcomes about teachers and staff are important to share with the community?
- What outcomes for families are important to share with the community?

13. How can information about the impact of BC be communicated most effectively with external and internal audiences?

- Teachers, families, community members, administrators (prompt if internal and external are not addressed)

**Closure Question:**

Is there anything that we haven't discussed regarding the Balanced Calendar initiative that you would like to share?

**Thank you again for participating in this interview**

## APPENDIX I

### Focus Group Protocol

**Time of Focus Group:**

**Date:**

**Focus Group Participants:**

---

My name is \_\_\_\_\_, and I am a doctoral student in Education Leadership at Virginia Commonwealth University and a member of a capstone team of 5 doctoral students. For our capstone (dissertation in practice), we are conducting an organizational improvement study with the goal of creating a comprehensive evaluation plan for HCPS's balanced calendar initiative. This study focuses on the essential components of an evaluation plan for HCPS, how the evaluation plan can drive improvement, and how an evaluation plan can strengthen support of the initiative.

Thank you so much for making time to share your thoughts with us.

Our Zoom session will be recorded for research purposes, but will not be shared with anyone outside of this project. *As a backup, I am also recording on \_\_\_\_ device.* The recording will be transcribed, and the research group will compile and analyze the results. Once the study is completed, we will erase the video and audio recordings.

Do I have your permission to record this focus group? (wait for response)

(Start Recording)

Before we begin, I must review some consent information with you.

Please ask me to clarify anything that is unclear.

***Purpose and Procedures:*** You are invited to participate in a study to share your thoughts about an evaluation plan for the balanced calendar initiative. Your insights will inform the development of an evaluation plan created by our team. One of the aims of the evaluation plan is to contribute to continuous improvement of the balanced calendar initiative.

If you agree to participate, I will ask you some questions about components of an evaluation plan for the balanced calendar initiative, about how the evaluation plan can be used to drive improvement, and how the evaluation plan could be used to strengthen support of the initiative. This focus group will take approximately 45-60 minutes and we plan for 3-4 people to participate.

**Voluntary Participation:** Your participation is voluntary. You may choose not to participate in this focus group, stop the focus group at any time, or skip any questions.

**Confidentiality Protections:** Information that you share with me will be used for our report. Only the study team and our professor will have access to the transcriptions of this focus group. Although the final report is public, we will destroy the focus group material after we submit the study. Names will only be used with permission in our analysis and findings.

Once the study has been completed, the report will be available from VCU at Scholar's Compass.

Do you have any questions about this study?

Do you consent to participate in this focus group?

YES – CONDUCT FOCUS GROUP

NO – Thank you for your time.

As we ask questions, please do not hesitate to speak up whenever something seems unclear or is hard to answer. There are no right or wrong answers.

**Before we begin, please share your role with HCPS and your role with the balanced calendar initiative.**

**First, we are going to ask a few questions focused on what you believe are essential components that should be included in an evaluation plan for the balanced calendar** (Research Question 1: What are the essential components of a quality comprehensive evaluation plan for the HCPS balanced calendar initiative?)

**1. From your perspective, what are the goals of the balanced calendar?**

- What will the balanced calendar achieve? (possible reframe)

**2. What are the most important actions HCPS can take to achieve the goals of the balanced calendar?**

**3. How would you suggest the success of the balanced calendar be measured?**

- **What would be your key indicators that the BC was successful?** (*Follow up if needed: voice & choice, soft skills, career opportunities, deeper learning, fun*)(possible reframe)

**4. What external factors might interfere with the balanced calendar initiative reaching its goals?**

**5. What internal factors might interfere with the balanced calendar initiative from reaching its goals?**

Now we are going to talk about how the evaluation plan could drive improvement of the balanced calendar initiative.

(Research Question 2: How can the balanced calendar evaluation plan drive improvement within the division?)

**6. What is a reasonable timeline for measuring the success of the balanced calendar?**

**7. What data or information do you believe would be beneficial to make improvements to the balanced calendar initiative?**

- *If no response, consider prompts such as improving over time*

**8. Please describe the current collaboration practices in HCPS for teachers, administrators and central office staff to improve instruction.**

**9. What are the biggest areas of concern you have about the balanced calendar for the coming year, two years, five years?**

We are going to end with a few questions about how the evaluation plan can be used to strengthen community support of the balanced calendar.

(Research Question 3: How can HCPS use the evaluation plan to strengthen support for the balanced calendar initiative in the larger community?)

**10. What results of the balanced calendar are most important to share with the community?**

- If you had to choose, would you prioritize sharing student academic outcomes or other kinds of information about student experiences?
- What outcomes about teachers and staff are important to share with the community?
- What outcomes for families are important to share with the community?

**11. How can information about the impact of BC be communicated most effectively with external and internal audiences?**

- Teachers, families, community members, administrators (prompt if internal and external are not addressed)

**Closure Question:** Is there anything that we haven't discussed regarding the balanced calendar initiative that you would like to share?

**Thank you again for participating in this focus group.**

## Appendix J

### Family Focus Group Invitation

Dear HCPS Families,

We are pleased to work with HCPS in your exciting first year of the balanced calendar initiative. As Mr. Davis has shared, we are the team of five doctoral students in VCU's Education Leadership program tasked with creating an evaluation plan for HCPS's balanced calendar initiative.

As you play a significant part in the division's initiative, we would like to have your participation in a focus group for about an hour sometime between 12/13-12/16. Your insights will help us create a comprehensive evaluation plan for the balanced calendar initiative. We would like to hear what you believe is the essential information that HCS should collect to determine if the balanced calendar initiative is successful. In addition, we would like to know what information you would like to receive about the effectiveness of the balanced calendar in meeting its goals as well as how you would like to receive that information.

If you choose to participate, the focus group will last under an hour and will be conducted by our team members through Zoom. If there is a strong preference for an in-person focus group, this can be arranged. Of course, your participation is voluntary. In May we will share our capstone findings and an evaluation plan deliverable with the division. While our capstone report is public, we will destroy the focus group material after we submit the study. Names will only be used with permission in our analysis and findings.

We are scheduling focus groups during the week of December 13. We will make ourselves available to fit your schedule. Should you have any questions, please feel free to call 804-397-5333 or reach out via email to [smithm14@vcu.edu](mailto:smithm14@vcu.edu).

Please complete [this form](#) or write [smithm14@vcu.edu](mailto:smithm14@vcu.edu) with your availability for a focus group between December 3- December 9, 2021.

Thank you for considering our request.

Sincerely,

Max Smith, Margot Zahner, Jeffrey Elmore, Ellen Burnett and Joy Blosser  
VCU HCPS Capstone 2022 Team

## Appendix K

### Capstone 2021 Family 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](mailto: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
I support the change to the Balanced Calendar.	●	●	●	●	●

I understand the Balanced Calendar initiative.	•	•	•	•	•
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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	•	•	•	•	•
Quality of Classroom Instruction	•	•	•	•	•
School Spirit and Morale	•	•	•	•	•
Teacher Quality	•	•	•	•	•
Variety of Courses and Programs	•	•	•	•	•
School Recognitions and Accolades	•	•	•	•	•

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	•	•	•	•	•
Academic learning opportunities beyond your student's courses	•	•	•	•	•
Workplace and vocational experiences outside of your student's courses	•	•	•	•	•
More frequent breaks in the school calendar	•	•	•	•	•
Organized activities for students during school	•	•	•	•	•

breaks					
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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	●	●	●	●	●
Participation data	●	●	●	●	●
Testimonials from students	●	●	●	●	●
Testimonials from teachers	●	●	●	●	●
Testimonials from	●	●	●	●	●

business and community partnerships					
Images and videos of intersessions	•	•	•	•	•
Opportunities for parent and community involvement					

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.

--

**APPENDIX L**

**Evaluation Plan and Toolkit**

# Balanced Calendar Evaluation Plan & Toolkit



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April, 2022

*Hopewell*

CITY PUBLIC SCHOOLS

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## OVERVIEW

Hopewell City Public Schools (HCPS) began the 2021-2022 academic year with an innovative year-round academic calendar. After a multi-year planning process involving participation by teachers, parents, community, and school division leaders, and with generous planning and implementation grants from the Virginia Department of Education (VDOE), the HCPS school board approved a division-wide transition to a balanced calendar with intersessions focused on enrichment.

### Intentional Design

By redistributing the 180 days of instruction and adding six enrichment weeks throughout the year, HCPS aims to increase student engagement, achievement and well-being. HCPS's goal for the balanced calendar with enrichment-focused intersessions is as simple as it is ambitious, that: *All children will be well in Hopewell*. In addition, the district believes that teachers will benefit from distributed breaks from instruction throughout the year and will relish opportunities to design instruction in areas of their passions. HCPS hopes these practices will lead to higher teacher engagement and broader adoption of deeper learning practices throughout the school year.

HCPS's enrichment-focused design to the balanced calendar is a radical departure from long-held practices of endless cycles of remediation, especially for students of color from high-poverty schools. If proven successful, HCPS leaders envision their balanced calendar design becoming a model for practice in the Commonwealth and the United States.

### Effective Evaluation

Effective evaluation practices and communication of results will be essential to the success of this bold initiative. In their year-round schools planning and implementation grant application to the VDOE, HCPS stated that in the first year of the balanced calendar, they would decrease student failure rates on the Standards of Learning assessments by 10%, decrease chronic absenteeism by 10%, and increase school climate scores by 10%. Additional formative and summative metrics will be needed to capture the full impact of the balanced calendar over time, ensure continual improvement, and build stakeholder support for the long-term success of the initiative. The comprehensive evaluation plan shared here will support HCPS in meaningfully assessing the balanced calendar

### Research

Our comprehensive evaluation plan recommendations draw from research conducted in the fall and winter of 2021 including a thorough review of over 100 texts of scholarly and practitioner research. In addition, after the first-ever round of intersession courses, our team conducted five interviews and seven focus groups with 26 total HCPS teachers, parents, school administrators, intersession coordinators, school board members, and division administrators. We also analyzed survey data from responses of 620 HCPS families to a survey administered prior to the start of the inaugural balanced calendar year. Finally, we analyzed over 269 documents shared by HCPS. Our data collection and analysis allowed us to hear high-level themes from participants as well as gain awareness of the more granular needs of stakeholders to inform the design of a comprehensive evaluation plan for the HCPS balanced calendar.

Through our review of literature, we created a model of best practices in conducting program evaluation. This model is explained in the Evaluation Best Practice section on pages 5-7. This research in evaluation best-practice provides the basis for our action recommendations.

## **Findings**

Multiple findings emerged through conversations with HCPS parents, teachers, administrators, staff and board members several. These findings, coupled with analysis of HCPS documents related to the balanced calendar and secondary survey data analysis, are synthesized on page four. Overall, respondents expressed hope for the future impact of the balanced calendar and confidence in the collaborative process of designing the innovation. Respondent's understanding of the goals of the initiative and necessary measurements aligned closely with the district's planning documents. Concerns surfaced regarding logistics of intersession implementation and selecting appropriate assessments. Our findings also strongly support a need for targeted and aligned communication methods throughout the implementation, evaluation and continual improvement of the initiative.

## **Recommended Action Steps**

A systematic and aligned approach to evaluation should be utilized to support the development of the balanced calendar innovation. The team offers seven recommended actions for an effective evaluation of the balanced calendar. These actions build off the work that the district has already done to build community support for the initiative through a participatory and collaborative process of designing the new calendar. Our action steps are summarized on page five. Detailed descriptions of our recommendations for a comprehensive and effective evaluation plan for the balanced calendar innovation follow.

Within this evaluation plan, the Capstone Team included a theory of change and logic model, an evaluation matrix with suggested evaluation tools, and a timeline for evaluation implementation. These resources are found with each recommendation and in the evaluation plan toolkit on pages 25-38.

## **Moving forward**

HCPS has demonstrated the bold and collaborative leadership necessary to achieve their ambitious goals for the balanced calendar. This evaluation plan will help HCPS draw conclusions about the initiative's effectiveness, impact, and outcomes. In addition, effective and transparent evaluation practices will allow HCPS to continue to innovate and adapt to meet their goals for students, families, and educators.

## FINDINGS

Through conversations with HCPS parents, teachers, administrators, staff and board members several key themes emerged. These findings, coupled with analysis of HCPS balanced calendar documents and secondary survey data analysis, are synthesized here.

1. **Optimism for the potential positive impact of the balanced calendar** and a deep commitment to the Hopewell community were consistent themes from participants in interviews and focus groups.
2. Participants **endorsed the primary goals of the balanced calendar**. Regarding students, participants hope the balanced calendar will **increase student engagement, academic achievement, and well-being**. Concerning teachers, participants hope the initiative will **increase engagement and instructional quality** while also **improving the overall work experience**. Additionally, participants said that it will be important for the district to measure these areas in their assessment of the balanced calendar's impact.
3. **Parent satisfaction and community investment** were identified as areas to measure, although not universally endorsed as a goal for the initiative.
4. There was overwhelming agreement among participants that **positive leadership** in both the central office and the schools along with a wide-spread **culture of collaboration** are **HCPS strengths**.
5. Participants believe that it will take at **least three to five years** to accurately assess the impact of the balanced calendar.
6. Participants identified **several challenges to be addressed within the evaluation plan**. These challenges include demonstrating **transparency** in the use of staff input to guide improvement cycles, improving intersessions' operational issues, ensuring **high-quality instruction** during intersessions, improving the validity and reliability of **assessment tools**, and making assessment tools more user-friendly.
7. A **final concern** voiced by participants was the **ability of HCPS to communicate effectively with all stakeholders** while accounting for stakeholders' diverse needs, interests, backgrounds, and communication preferences.

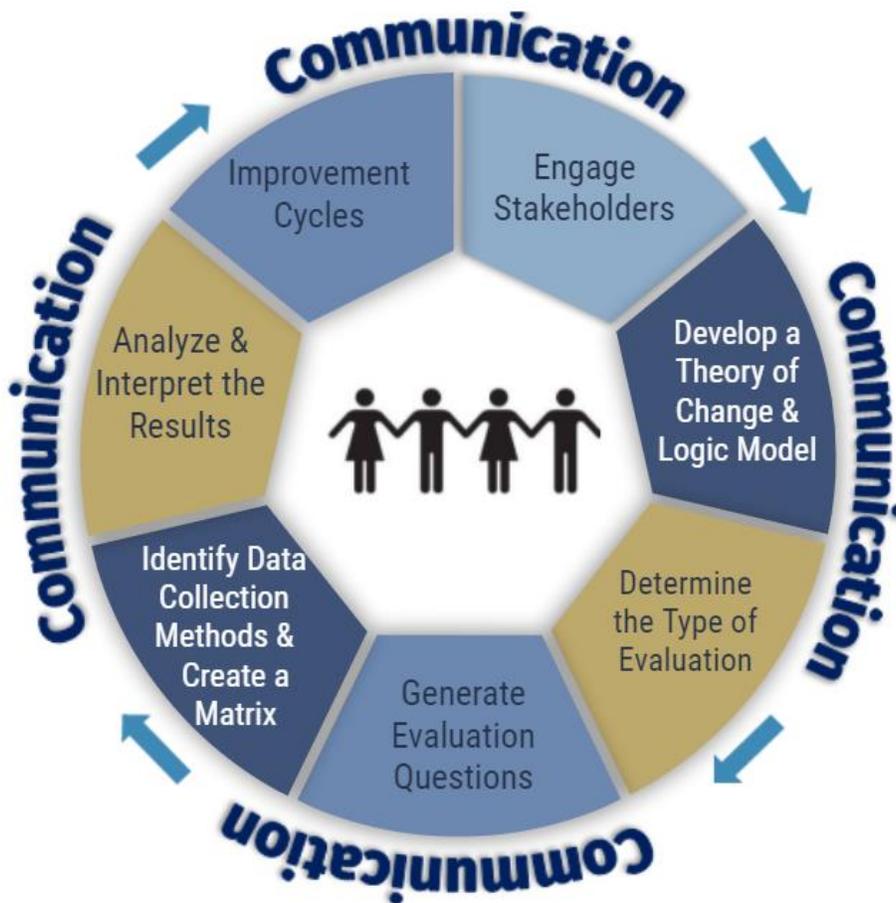
## EVALUATION PLAN BEST PRACTICES

**A strong evaluation process, including continuous cycles of improvement, leads to successful implementation of an initiative.**

The components of an effective evaluation process, synthesized from scholarly and practitioner research, are summarized in this section. These components are the foundation of the recommendations for HCPS evaluation of the balanced calendar.

The purpose of an evaluation is to collect and analyze data or information about an initiative to make conclusions about its effectiveness, impact, and outcomes. Evaluations seek to demonstrate the degree to which an initiative is working as intended and achieving the established goals and objectives. The process of evaluation supports the identification of a program's strengths, weaknesses, and opportunities for growth. (US Department of Education, 2014; US Department of Health and Human Services, 1999; W. K. Kellogg Foundation, 2017)

### Essential Components of a Program Evaluation



## Engage Stakeholders

Engaging a diverse group of stakeholders at the beginning and throughout an evaluation process helps to ensure equitable and high-quality outcomes of an evaluation. When engaging stakeholders, consider individuals who have content knowledge of the initiative, who represent diverse perspectives and experiences, and who are affected by the program. (US Department of Education, 2014; W.K. Kellogg Foundation, 2017).

Evaluations of the HCPS balanced calendar will be used by three different audiences:

**Instrumental Users:** HCPS school staff, aided by the action and advisory committees, whose formation is recommended in the evaluation plan action steps, will apply the findings of the evaluation process in daily operations.

**Conceptual users:** Families and local business members will use evaluation results to make decisions about their support of the balanced calendar.

**Strategic users:** VDOE, General Assembly, school board members and other school divisions will use the results to determine the future of the balanced calendar.

## Develop a Theory of Change & Logic Model

Effective program evaluation begins with a clearly articulated theory of change and often includes a logic model. These roadmaps ensure clarity of the initiative and inform the design of the evaluation process. A Theory of Change allows stakeholders to, “understand how an intervention works, consider who it will affect, and identify relevant outcomes” (US Dept. of Education, 2019, pg. 1).

A logic model is developed from a TOC and is used to illustrate the relationships among the program resources, activities, outputs, and outcomes, including short-term, intermediate, and long-term outcomes of the initiative (Lawton et al., 2014; Little, 2014; Martin, 2015; W. K. Kellogg Foundation, 2017). Refer to page 31 to review the HCPS Theory of Change created with input from key stakeholders.

## Determine Types & Timing of an Evaluation

Aligning the type of evaluation and the timing of the evaluation to a program's purpose and stage will help generate meaningful evaluation data.

Three types of evaluation occur during three distinct stages of program implementation:

- **Formative Assessment:** Identifies strengths and weaknesses during the early stages of implementation (years 0-3).
- **Performance Monitoring:** Takes place anytime throughout the initiative and monitors progress towards the initiative's goals.
- **Summative Evaluation:** Occurs after the initiative has been implemented for a period of time (years 3-5) and examines if the initiative is achieving its desired outcomes and is sustainable. (W.K. Kellogg Foundation, 2017). A multi-phase timeline was endorsed by families, teachers, administrators and central office staff.

## Generate Evaluation Questions

Generating evaluation questions encourages stakeholders to ensure the evaluation plan is focused on collecting the right data to determine if the initiative is on track towards achieving long-term goals (US Dept. of Education, 2014; W.K. Kellogg Foundation, 2017). The theory of change and logic model is used to generate evaluation questions that determine which data to collect and guide how to examine that data. Evaluation questions should be developed for each stage of the evaluation including formative, performance monitoring, and summative.

## Identify Data Collection Methods & Create an Evaluation Matrix

Stakeholders identify which data collection methods will be used for each stage of the evaluation. Examples of data collection methods include surveys, interviews or focus groups, observations, assessments. These assessments are organized into an evaluation.

**An evaluation matrix** provides a usable structure to organize all of the evaluation information including evaluation questions, indicators, targets, data collection methods, sources and frequency of the data collection (US Dept. of Education, 2014; W.K. Kellogg Foundation, 2017). Additionally, the evaluation matrix provides stakeholders with a clear picture of how to administer the evaluation. Refer to page 27 for the HCPS Evaluation Matrix compiled by the capstone team.

## Analyze & Interpret the Results

Stakeholders analyze data from evaluation results throughout the initiative's implementation (US Dept. of Education, 2014; W.K. Kellogg Foundation, 2017).

- **Formative Stage:** Stakeholders examine the data to identify strengths, weaknesses, and discuss lessons learned from early implementation. Stakeholders reflect on what is working well and early lessons learned.
- **Process Stage:** stakeholders analyze evidence related to the initiative's impact on the desired short-term, intermediate, and long-term outcomes.
- **Summative Stage:** Results of the data collected are used to drive the continuous cycle of improvement and determine sustainability.

## Engage in Improvement Cycles

Interactive improvement cycles include stakeholders in addressing changing circumstances and show an organization's ability to receive, process, and respond to feedback (Arnold, 2011; Courtney, 2020; Foord & Haar, 2012). Two common methods of continuous improvement are *Plan-Do-Check- Act* and the *Kaizan model*. PDCA is typically used for large scale improvement initiatives and the *Kaizan model* is used at small scale to solve problems and create efficiencies (Shakman et al., 2020; Tichnor-Wagner et al., 2017). Reviewing and revising the TOC and logic model are critical steps to ensure continued alignment to the goals of the initiative as well as to make adjustments guided by the progress of the initiative (Courtney, 2020).

## RECOMMENDED ACTION STEPS

### Continue the Strong Foundation of Stakeholder Engagement



1. **Activate an Action Team and Advisory Committees**

### Build on Work in Progress



2. **Review and update the theory of change & logic model**



3. **Select aligned & reliable data collection methods**



4. **Publicize an evaluation timeline**

### Implement Intersession Innovations & Communicate Effectively



5. **Iterate practices through improvement cycles**



6. **Showcase early wins**



7. **Tailor communication to audiences & consider a data dashboard**



As I visited classrooms and schools, it was absolutely **fantastic** to see **students** working on a project together, **learning to be a team**, learning how to **listen**, to talk back and forth, and the **teacher** walking around and **smiling**.

~School Board member



## Action 1



## Activate an Action Team & Advisory Committee

Engaging a diverse group of stakeholders at the beginning and throughout an evaluation process ensures equitable and high-quality outcomes of an evaluation. A strong evaluation process will more likely lead to successful implementation of an initiative.

HCPS needs two committees of dedicated stakeholders to manage, drive, and evaluate the process and progress of the balanced calendar initiative. These committees need to represent the three different audiences for the evaluation plan: instrumental, conceptual, and strategic users.

Instrumental users such as HCPS school staff will apply the findings of the evaluation process in daily operations. Conceptual users including families of students and local business members will use evaluation results to make decisions about their support of the balanced calendar. Strategic users including the VDOE, General Assembly, school board members and other school divisions will use results from the evaluation plan to determine the future of the balanced calendar.

“Our **leadership** has done a great job trying to **inform parents** and **educate** everybody, **businesses**, the city itself, **city leaders**, as well. That is a positive direction to go in.”

~School Board Member

### Action Steps:



- **Activate an Action Team** made up of diverse internal stakeholders: **students, parents, and HCPS staff** who meet monthly to drive ongoing programmatic improvements
- **Activate an Advisory Committee that includes** internal and external stakeholders who meet quarterly to monitor progress, offers feedback, and champion the balanced calendar by continuously **communicating progress to stakeholders**

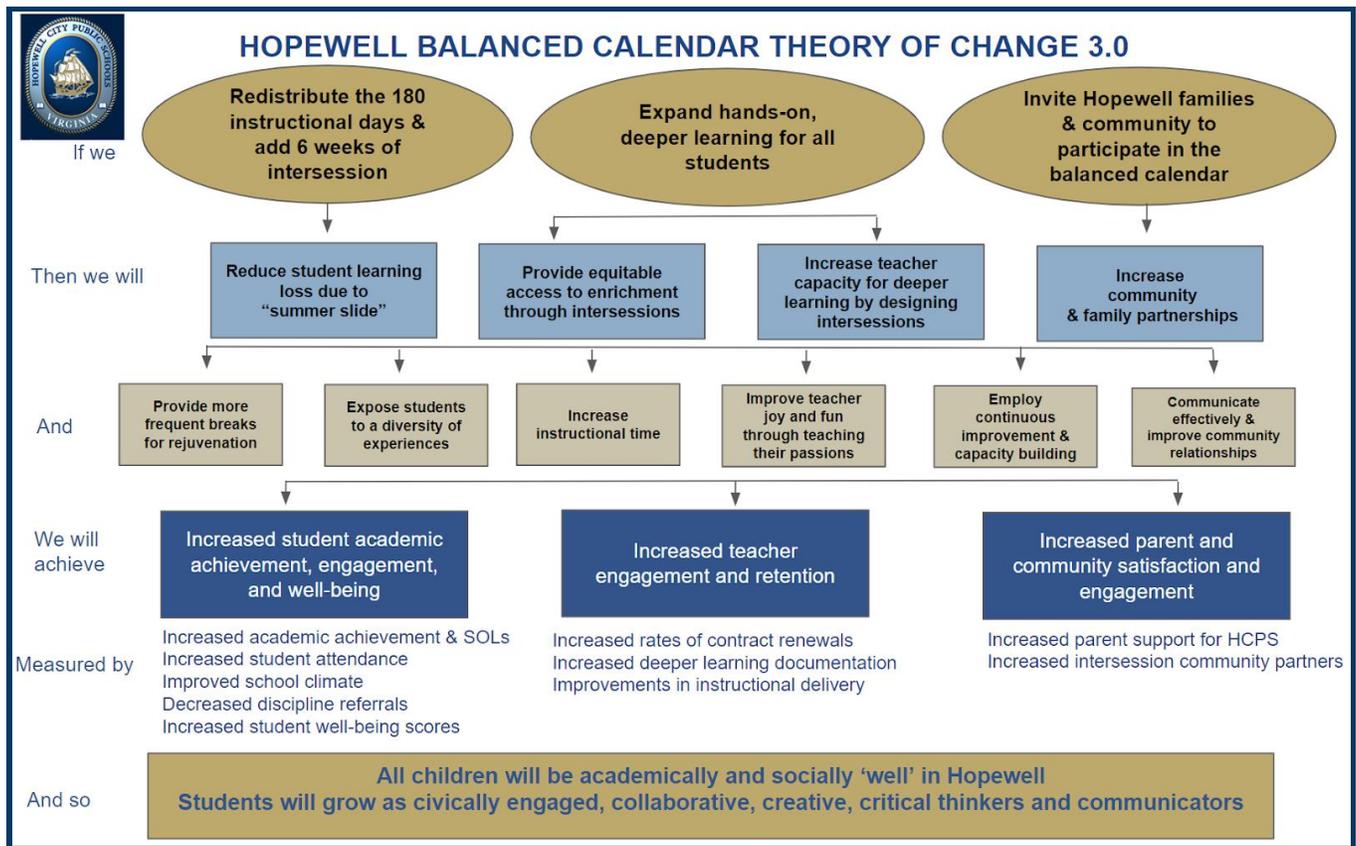
Action 2



# Review and Update the Theory of Change & Logic Model

Annual reviews of the theory of change (TOC) and logic model by the Action Team ensures alignment of goals, actions and assessments of the balanced calendar.

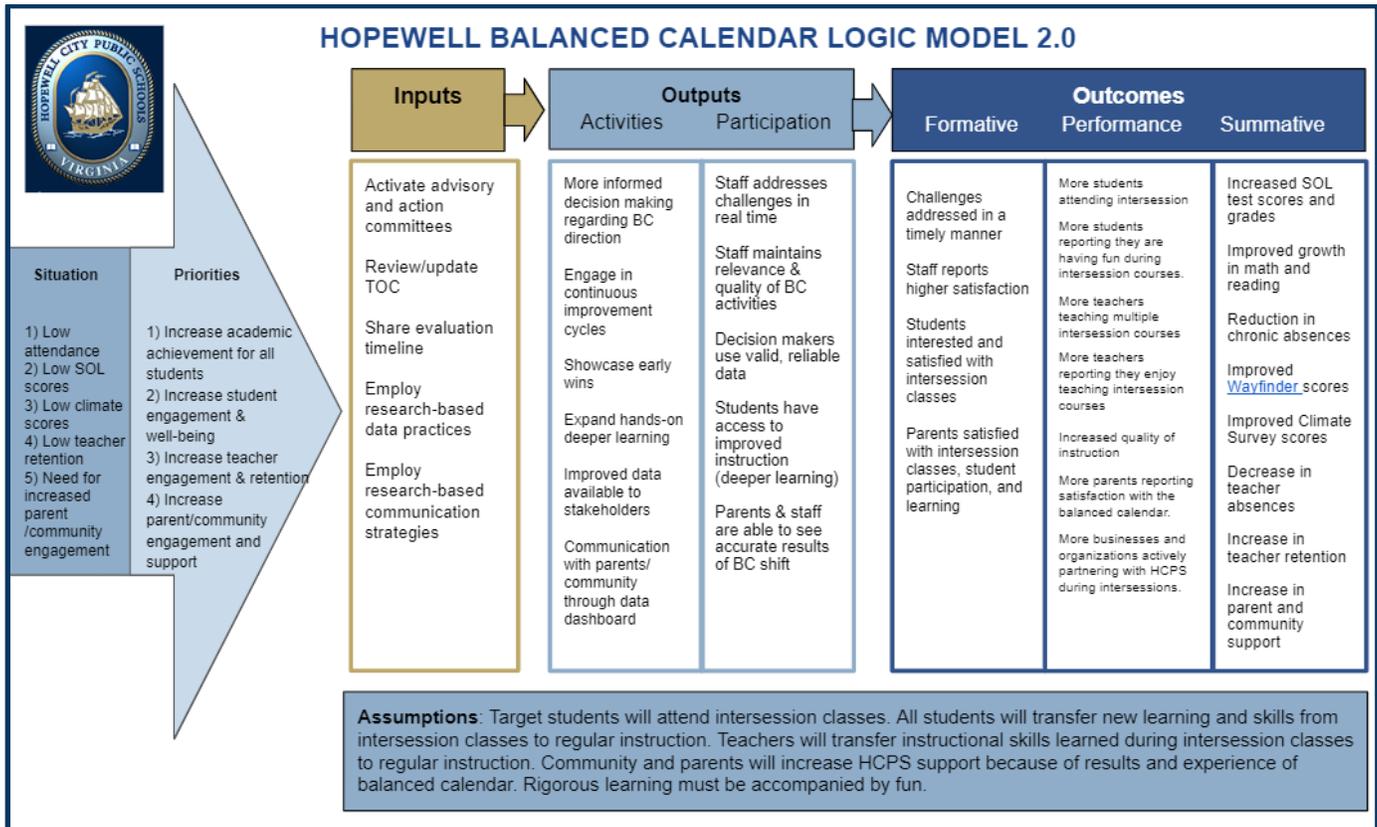
The TOC below was prepared by the Capstone Team and has been revised multiple times based on interview and focus group participant input. This TOC is ready for the action committee to review and revise over time.



## DEVELOP A THEORY OF CHANGE & LOGIC MODEL

A logic model illustrates relationships among the balanced calendar resources and activities and the outcomes anticipated for the initiative at three different stages. Importantly, a logic model explicitly states some of the assumptions underlying a program design.

The logic model below was prepared by the Capstone Team for the HCPS Balanced Calendar Action Team to review.



### Action Steps:

- The **Action Team engages in a structured process to adapt the draft TOC and logic model** for the balanced calendar initiative. Templates of the TOC and Logic Model are in the toolkit.
- Members of the action committee should **ensure understanding and alignment of the goals, actions, steps, desired results, and methods of measurement**, reviewing the models on an **annual basis**.
- This review **helps identify gaps in understanding** that will provide opportunities to **explore those gaps and reconcile them** and lay the groundwork for **valid and reliable measures of the initiative**.
- The **Action Team communicates adjustments of the TOC and logic model** to the **Advisory Committee for approval and dissemination to all stakeholders**

Action 3



## Select Aligned and Reliable Data Collection Methods

An effective evaluation plan requires aligned and reliable data sources. Assessments provide accurate information about how the initiative is progressing towards meeting the goals outlined in the TOC. As the TOC is updated, assessment tools are reviewed to ensure continued alignment.

**Action Steps:**

- **The Action Team** reviews, revises, and prioritizes evaluation questions based on available resources and the feasibility with which they can be answered. They should begin their work using the evaluation questions found below.

“I think the **most powerful data** is what we get from our **kids**. Whether that’s a survey, whether it’s empathy interviews...I think that what **kids tell us** should **drive our adjustments**.”

Dr. Hackney’s response when asked which data should drive improvements.

*Evaluation questions aligned to each stage of the evaluation*

Formative Stage	Performance Monitoring Stage	Summative Stage
<ul style="list-style-type: none"> <li>• To what extent do students report having fun during intersession courses?</li> <li>• To what extent do teachers report satisfaction with intersession courses?</li> <li>• To what extent do parents report satisfaction with intersession courses?</li> </ul>	<ul style="list-style-type: none"> <li>• How often do students attend intersession courses?</li> <li>• How many teachers volunteer to teach intersession courses?</li> <li>• To what extent do community businesses partner with HCPS during intersession courses?</li> </ul>	<ul style="list-style-type: none"> <li>• How often are students absent from school?</li> <li>• To what extent is student well-being increasing due to the balanced calendar?</li> <li>• To what extent did student achievement increase?</li> <li>• To what extent are teachers leaving HCPS to teach in other divisions?</li> </ul>

- The **Action Team determines the types of evaluations** that will be administered.
  - Formative Assessments** such as student and staff input through surveys provide valuable feedback during the first years
  - Performance Monitoring Assessments** (1-4 yrs.) includes input from students, families and staff as well as quantitative data such as attendance during intersessions and the regular academic year.
  - Summative evaluation** (3-5 years) includes summative data such as SOL performance, VDOE climate surveys, and teacher retention rates.

## IDENTIFY DATA COLLECTION METHODS & CREATE EVALUATION MATRIX

- The **Action Team** identifies the **data collection methods** which are aligned to the **evaluation questions** to ensure the **data gathered will answer each question** and **provide a measure of growth towards the targets**.
- The Action Team selects data collection methods that are **valid, reliable, easy to use, and cost effective**. Consider the **end-user** when selecting survey tools.
- The **Action Team approves an evaluation matrix** to provide all stakeholders with a roadmap of how to administer the evaluation. The proposed Evaluation Matrix is included in the Toolkit pp. 27-30.
- The **Advisory Committee** reviews the matrix for **alignment between goals and assessments** and to **validity, reliability, accessibility, and student privacy protections**.

“Definitely **student growth** and **achievement**. I think that as a parent, parents want to know how these things are really **positively impacting** their children and setting them up for a **better future**.”

Administrator’s response when asked which results should be shared with the community.

Below is a sample evaluation matrix for the formative stage created based on interview and focus group participant input. The [matrix for each stage of the evaluation plan](#) created by the Capstone Team is in the Evaluation Plan Toolkit and is ready for the Action Committee to review, revise and adopt.

### Formative Stage: Early Implementation Years 2021-2024

Outcomes	Sample Evaluation Questions	Indicators	Sample Targets	Data Collection Methods	Data Sources	Data Collection Frequency
Increased Student Engagement	To what extent do students report having fun during intersession courses?	Increased rate of students reporting they are having fun and the courses are interesting.	Year 1: 75% of students attending intersession report the courses are fun and interesting Year 2: 85% of students attending IS courses report that courses are fun and interesting.	Student Surveys  Interviews/Focus Groups	Completed Students Surveys  Transcripts	After each intersession week  Bi-annually
Increased Teacher Engagement	To what extent do teachers report satisfaction with intersession courses?	Increased rate of teachers reporting they enjoy teaching intersession courses	Year 1: 50% of teachers report they enjoy teaching courses Year 2: 65% of teachers report they enjoy teaching courses	Teacher Surveys  Interviews/Focus Groups	Completed Teacher Surveys  Transcripts	After each intersession week  Bi-annually
Increased Parent Satisfaction	To what extent do parents report satisfaction with intersession courses?	Increased rate of parents reporting their children enjoy the intersession courses.	Year 1: 50% of parents whose children attend intersessions report their children enjoy the courses. Year 2: 70% of parents whose children attend intersessions report their children enjoy the courses.	Parent Surveys  Interviews/Focus Groups	Completed Parent Surveys  Transcripts	After each intersession week  Bi-annually

Action 4



## Publicize an Evaluation Timeline for each Phase of the Balanced Calendar

An evaluation timeline provides a roadmap for implementing formative, performance monitoring, and summative evaluation measures to assess the success of the balanced calendar. The evaluation timeline will guide the division in administering the evaluation measures and communicating to the public when to anticipate results.

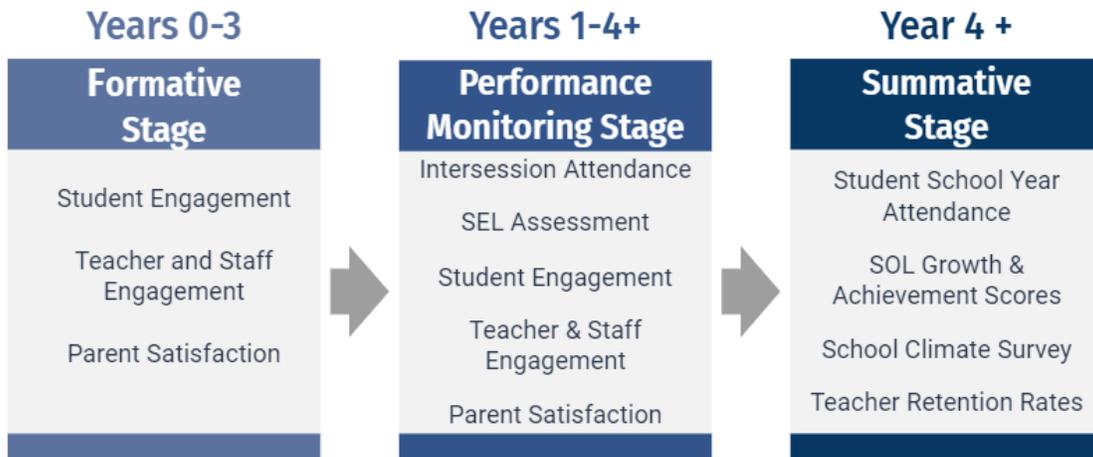
“We **won’t** truly **see** the **success** of this until we **get a handle** on the **pandemic**. We may note some improvement, but I don’t think we’re going to see the full value...for a **couple [of] years**.”

School Board member’s response to what is a reasonable timeline.

**Action Steps:**

- The **Action Committee** reviews the **timing of the evaluation**. The **multi-phase timeline** below, created by the Capstone Team, was **endorsed by families, teachers, administrators and central office staff**.
- **Baseline data** will be collected in the **third year** to ensure more accurate data, after the impact of COVID has lessened.
- The **evaluation timeline** was created using the **evaluation matrix**. It is ready to be **shared with the advisory committee for approval and dissemination to all stakeholders**.

### Evaluation Timeline



By establishing and publishing a three-phase evaluation timeline, HCPS can set stakeholder expectations and address expectations for results that may not be feasible. Additionally, HCPS is able to hold itself accountable to ensure their actions remain aligned to the goals of the initiative.

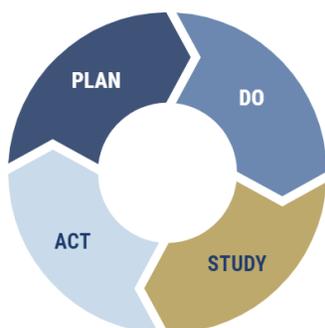
## Action 5



## Iterate Balanced Calendar Innovations through Improvement Cycles

Facilitating **ongoing improvement cycles** will be essential to successful implementation of the HCPS balanced calendar. The cyclical process of continuous improvement will help HCPS set goals, identify ways to improve, analyze performance data, and evaluate changes in a continuous feedback cycle. Internal and external stakeholders will develop confidence in the change initiative through transparent and well-communicated improvement efforts.

### Continuous Improvement Cycles



“We’re a small community so it’s always been my belief that **when our community works together, we can accomplish great things**. And I believe the balanced calendar year presents us the opportunity to do just that.”

School Board member’s response to how the evaluation plan can be used to strengthen support for the balanced calendar initiative.

### Action Steps:

- **Ensure engagement of the Action Team and Advisory Committee** in iterative improvement efforts. The engagement of these stakeholders will help **revive the high level of community participation** that existed in the planning phase of the balanced calendar.
- **Analyze and interpret evaluation results from valid and reliable data sources** to understand student, teacher and family experience of the balanced calendar, especially intersession courses. Sources may include post project tuning interviews, quantitative surveys of student socioemotional learning, and **quantitative surveys** on intersessions.
- **Implement a systematic data analysis and interpretation process**. The Balanced Calendar Coordinator will **disaggregate data** by subgroup, compare actual results to intended targets, and highlight trends and outliers. The results of the data analysis will be reviewed quarterly by the Action Team who will then develop improvements and recommendations. The Action Team will

then share these with the Advisory Committee, ensuring continual improvement of the balanced calendar.

- **Ensure quality and consistency** of instruction by revising **observations and evaluations** of teachers and principals to align with current instructional improvements. Quality and consistency measures should then inform updates to the HCPS strategic plan.

“We’re going to figure out how to measure **student voice**, **student engagement**, parents...some of those **non-traditional** things that **really matter**.”  
~Dr. Hackney

HCPS should communicate outcomes from these action steps to aid in building stakeholder support for the long-term success of the initiative.

### IMPROVEMENT CYCLE STRATEGIES

*A sample tool to assist HCPS planning and implementation of improvement cycles is provided below. Responsible people, timing, and follow up activities are explicitly stated.*

Form of Improvement	Examples of Focus Areas:	Dissemination	Responsible Person	Follow Up Activities
Process Cycles (Short Term)	Interessions: <ul style="list-style-type: none"> <li>● Registration process</li> <li>● Purchase &amp; storage of supplies</li> <li>● Course offerings</li> <li>● Transportation</li> <li>● IEP/504 Accommodations</li> </ul>	Ongoing  Building Level  Print & Verbal	Building Level Administration  Innovation Coaches	Tuning Meetings  Professional Development
Performance Cycles (Medium Term)	Operations: <ul style="list-style-type: none"> <li>● Custodial Schedules</li> <li>● Building Maintenance</li> <li>● Field Experiences &amp; Content of Interessions</li> </ul>	Quarterly or Biannual  Elementary and Secondary Level  Print & Verbal	Building Level Administration  Interession Coordinators	Internal Project Meetings  Cross Building Coordination
Summative (Long Term)	Student Engagement: <ul style="list-style-type: none"> <li>● School Climate</li> <li>● Social Emotional Learning</li> <li>● Attendance</li> <li>● Enrollment in Interessions</li> </ul> Student Achievement: <ul style="list-style-type: none"> <li>● SOL Pass Rates</li> <li>● SAT/ACT Data</li> <li>● AP Enrollment</li> </ul>	Annual  Division Level  Print & Verbal	Division Leadership  Action Committee  Advisory Committee	Press Conference  Board Presentations  Town Halls

Action 6



## Showcase Early “Wins”

Communicating quick wins is critical to building support for an initiative. By communicating these early success stories, HCPS will engage stakeholders and broaden support for the initiative. Frequent communication showcasing student stories and showing improvement will build a sense of connection between HCPS and the community.

Stakeholders shared that they want to hear personal stories about how students, teachers, and staff are impacted by the initiative. They desire specific stories focusing on the joyful and meaningful enrichment experiences taking place during intersessions.

### Action Steps:

- The Action Team **curates stories** and **artifacts** of student, teacher, staff, and family **experiences** related to the balanced calendar and intersessions. The selected stories should **exemplify the goals** of the initiative.
- The Action Team uses **surveys, interviews, and focus groups** to solicit **stakeholder input** and facilitate **reciprocal communication**.
- The Action Committee **ensures** all **stakeholder groups, schools, and grade levels are represented** when curating the stories and images.

“Showing **video clips of students...**that's pretty **powerful**. If we're pushing out **pictures, videos, and products** that the **students have built**, or have worked on over the **intersessions**. Including **video testimonials** from **students** about what the **experience was like to them.**”

Staff member's response to which results are most important to share with the community.

“They say a **picture speaks volumes** over just a word. So **sharing** some of the **things** we have **captured in these intersessions.**”

School Board member's response to how the evaluation plan can strengthen community support for the balanced



## Action 7



## Tailor Communication to Audiences & Consider Using a Data Dashboard

**Effective communication is essential** throughout the implementation and ongoing improvement of the balanced calendar. A multifaceted communication strategy will build necessary stakeholder investment in the ongoing story of the balanced calendar throughout the complex change process.

Communication methods should be tailored to the needs of diverse audiences and aligned with the developmental process of the initiative.

Participants in focus groups and interviews repeatedly emphasized that Hopewell is a close-knit community where face-face community events like football games and city-wide fairs are important places to share the story of the bold HCPS balanced calendar innovation. In addition, participants shared a nearly universal appreciation for student learning exhibitions. Finally, participants stated that many family stakeholders did not have easy access or comfort with complex technology platforms such as data dashboards preferring instead communication methods such as texts, robo calls, paper sign-up forms, and social media platforms.



### Action Steps:

- **Prioritize multiple methods** of communication using **accessible modes** of communication in stakeholder home languages. HCPS should host and leverage community-based in-person events to build relationships and strengthen the sense of connection to the balanced calendar.
- **Ongoing communications**, including sharing early wins, can include student achievement and student engagement data, as well as student and teacher testimonials. The timing, frequency, method, and content of each communication should align with the purpose and intended audience.
- **Solicit and respond to stakeholder feedback** will help evaluate whether the balanced calendar initiative is meeting the needs and expectations of stakeholders.

“With the balanced calendar, **we are there for these children** throughout an entire year, along with intersessions, and that strengthens and continues the learning process. **That’s the most important thing for me.**”

School Board member’s response when asked about the goals of the balanced calendar initiative.

- Consider creating a **data dashboard** which can be an effective communication tool for the right audience. A data dashboard **allows users to select and sort information by different domains**. Considerations for use of a data dashboard include logistical aspects such as the type of device being used to access the dashboard, and the user having adequate internet access. External and authorizing audiences may be the most appropriate to consider for communication of evaluation results of the balanced calendar through a data dashboard. More information and design ideas about a balanced calendar data dashboard are included in the Evaluation Plan Toolkit on page 36.

*Below is a sample communication matrix including description of end users and examples of the kinds of communication appropriate for each audience and stage of evaluation. This matrix may help HCPS tailor their communication to audience type.*

### Communication Strategies for Evaluation of the Balanced Calendar

Audience	Intended Users	Focus Areas	How to Engage	Product Examples	Communication Delivery
External	Parents School Board Business & Community Leaders VDOE General Assembly Other School Divisions General Public	Student engagement Student achievement Parent satisfaction Community Partnerships	Surveys Interviews & Focus Groups Town Halls Exhibitions of Learning	Executive Summary One-Pager PowerPoint Presentation Dashboard Report Website Reporting Social Media posts	Exhibitions of learning Email/Text Social Media TV/News Town Halls Open House Events Data Dashboard
Internal	Students Teachers Administration	Student engagement Student achievement Teacher engagement Teacher satisfaction Teacher retention Parent satisfaction	Surveys Empathy Interviews Focus Groups & Interviews	Report Executive Summary One-Pager Building Meetings Social Media Posts	Email/Text Exhibitions of learning Social Media Board Presentations

**Tell the story, tell the story, tell the story.**



“I’ve told them this from the get go, **your JOY** will be impacted if we get this right. Your **satisfaction**, your **LOVE** of this **calling**, the **reason** you got into this work...will return, **if we do this right.**”

~Dr. Hackney



## CONSIDERATIONS

### Significant Leadership Change

#### Challenge

**Leadership, political will, and institutional knowledge** are integral to the success of the balanced calendar initiative.

**Transition or retirement could pose significant challenges** to the long-term sustainability of the initiative.

This consideration is **pronounced** if HCPS was to have **turnover of central office personnel**, building level administration, school board membership, or at the intersession coordination level.

#### Possibility

**Stable leadership** for the next 3-5 years will be critical.

To support effective transition, **cross training opportunities, detailed record keeping, mentorship** programs, and hiring that allows **cross over periods** should be considered.

### Resurgent COVID-19

#### Challenge

**Stable health and attendance** of HCPS personnel and students are important to maintaining widespread stakeholder support of the initiative.

Further variants could pose obstacles to **consistent staffing** of classes and intersessions for HCPS. **Student attendance** could be dramatically reduced due to confirmed cases and mandatory isolation periods.

During the opening of the first school year with a Balanced Calendar in August of 2021, the Delta variant of COVID-19 was peaking. A recurrence of a resurgent variant could lead to similar **staffing shortages, student absenteeism, and school closures**.

#### Possibility

Developing **contingency plans** based on HCPS's experience with Delta and Omicron will be necessary to be ready for new challenges posed by variants yet to be identified.

Additional **hiring for health staff, expanded substitute teacher roles**, and additional division level **pre-planning and communication** of contingency plans should be considered.

## Financial Sustainability

### Challenge

**Sustainable funding sources** will be necessary to maintain the long-term financial health of the initiative.

**VDOE grant funds** have been used for the implementation phases of the initiative and current budgeting accounts funds **through year five**.

**Current inflation, labor shortages, and a potential recession** could pose financial challenges to the continuation of the balanced calendar.

### Possibility

HCPS must **develop relationships** with local businesses, philanthropic organizations, and state level sponsors to **attract funds** to carry them beyond year five.

HCPS should consider **hiring development and evaluation personnel**. Leadership should examine **reducing costs** once implementation phases are completed so that costs are commensurate with dependable revenue streams.

## NEXT STEPS

The HCPS balanced calendar initiative impacts every school, teacher, student, and family in the City of Hopewell. Given this wide-reaching impact, ongoing evaluation informed by stakeholder input is essential for the success of students as well as the initiative.

We believe this comprehensive evaluation plan and toolkit will prove beneficial to HCPS as they venture further into their journey. Using the evaluation plan as part of a collaborative process will position HCPS to serve as a lighthouse, marking a channel for improvement for other divisions in the state and even the nation.



The Capstone Team is grateful for the opportunity to be of service to the bold HCPS community.



# Balanced Calendar EVALUATION TOOLKIT



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Evaluation Matrix*	27
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\* Click on items in the table of contents followed by an asterisk for an editable electronic document.

## EVALUATION MATRIX

### Suggested Data Collection Methods Referenced in Matrix

Social Emotional Assessment [Wayfinder Assessment](#)  
 Academic Growth Assessment [MAP Reading and Math Growth Assessment](#)

### Sample Intersession surveys for students, teachers and families.

Draft Student Surveys [PK-2 Student Intersession Survey](#)  
[3-5 Student Intersession Survey](#)  
[Secondary \(grades 6-12\) Student Intersession Survey](#)  
 Draft Teacher Survey [Teacher Intersession Survey](#)  
 Draft Family Surveys [Elementary Family Intersession Survey](#)  
[Secondary Family Intersession Survey](#)

### Formative Stage: Early Implementation Years 2021-2024

Outcomes	Sample Evaluation Questions	Indicators	Sample Targets	Data Collection Methods	Data Sources	Data Collection Frequency
Increased Student Engagement	To what extent do students report having fun during intersession courses?	Increased rate of students reporting they are having fun and the courses are interesting.	Year 1: 75% of students attending intersession report the courses are fun and interesting	Student Surveys	Completed Students Surveys	After each intersession week
			Year 2: 85% of students attending IS courses report that courses are fun and interesting.	Interviews/Focus Groups	Transcripts	Bi-annually
Increased Teacher Engagement	To what extent do teachers report satisfaction with intersession courses?	Increased rate of teachers reporting they enjoy teaching intersession courses	Year 1: 50% of teachers report they enjoy teaching courses	Teacher Surveys	Completed Teacher Surveys	After each intersession week
			Year 2: 65% of teachers report they enjoy teaching courses	Interviews/Focus Groups	Transcripts	Bi-annually
Increased Parent Satisfaction	To what extent do parents report satisfaction with intersession courses?	Increased rate of parents reporting their children enjoy the intersession courses.	Year 1: 50% of parents whose children attend intersessions report their children enjoy the courses.	Parent Surveys	Completed Parent Surveys	After each intersession week
			Year 2: 70% of parents whose children attend intersessions report their children enjoy the courses.	Interviews/Focus Groups	Transcripts	Bi-annually

## EVALUATION MATRIX

### Performance Monitoring Stage: Ongoing 2021-2025+

Outcomes	Sample Evaluation Questions	Indicators	Sample Targets	Data Collection Methods	Data Sources	Data Collection Frequency
Increased Student Engagement	How often do students attend intercession courses?	Increased participation in intercession courses	Year 1: 33% of students participate in intercession courses  Year 2: 50% of students participate in intercession courses.	Intercession attendance	PowerSchool	After each intercession week
	To what extent do students report having fun during intercession courses?	Increased rate of students reporting they are having fun and the courses are interesting.	Year 1: 75% of students attending intercession report the courses are fun and interesting  Year 2: 85% of students attending IS courses report that courses are fun and interesting.	Student Surveys  Interviews/Focus Groups	Completed Students Surveys  Transcripts	After each intercession week  Bi-annually
Increased Student Well-Being	To what extent is student well-being increasing due to the balanced calendar?	Improved <a href="#">Wayfinder</a> scores	Year 1: Baseline data collected  Year 2: Increase by 20%	<a href="#">Wayfinder Assessment</a>	Complete Wayfinder Surveys	Each week throughout the school year including intercession weeks (for students who attend)
Increase Teacher Engagement	How many teachers agree to teach intercession courses?	Increased number of teachers teaching intercourses beyond the required one	Year 1: Baseline data collected  Year 2: Increase in number of teachers teaching 2+ courses by 10%			Annually
	To what extent do teachers report satisfaction with intercession courses?	Increased rate of teachers reporting they enjoy teaching intercession courses	Year 1: 50% of teachers report they enjoy teaching courses  Year 2: 65% of teachers report they enjoy teaching courses	Teacher Surveys  Interviews/ Focus Groups	Completed Teacher Surveys  Transcripts	After each intercession week  Bi-annually
Improved Instructional Quality	To what extent are teachers integrating more deeper learning lessons into their instruction during the regular school year?	Increased integration of deeper learning strategies into teachers' regular school year instruction	Year 1: Baseline data collection	Walkthroughs	Completed Walkthrough Forms	One per year per teacher
				Interviews/Focus Groups or PLC Conversations	Transcripts/ Minutes from meetings	Bi-annually

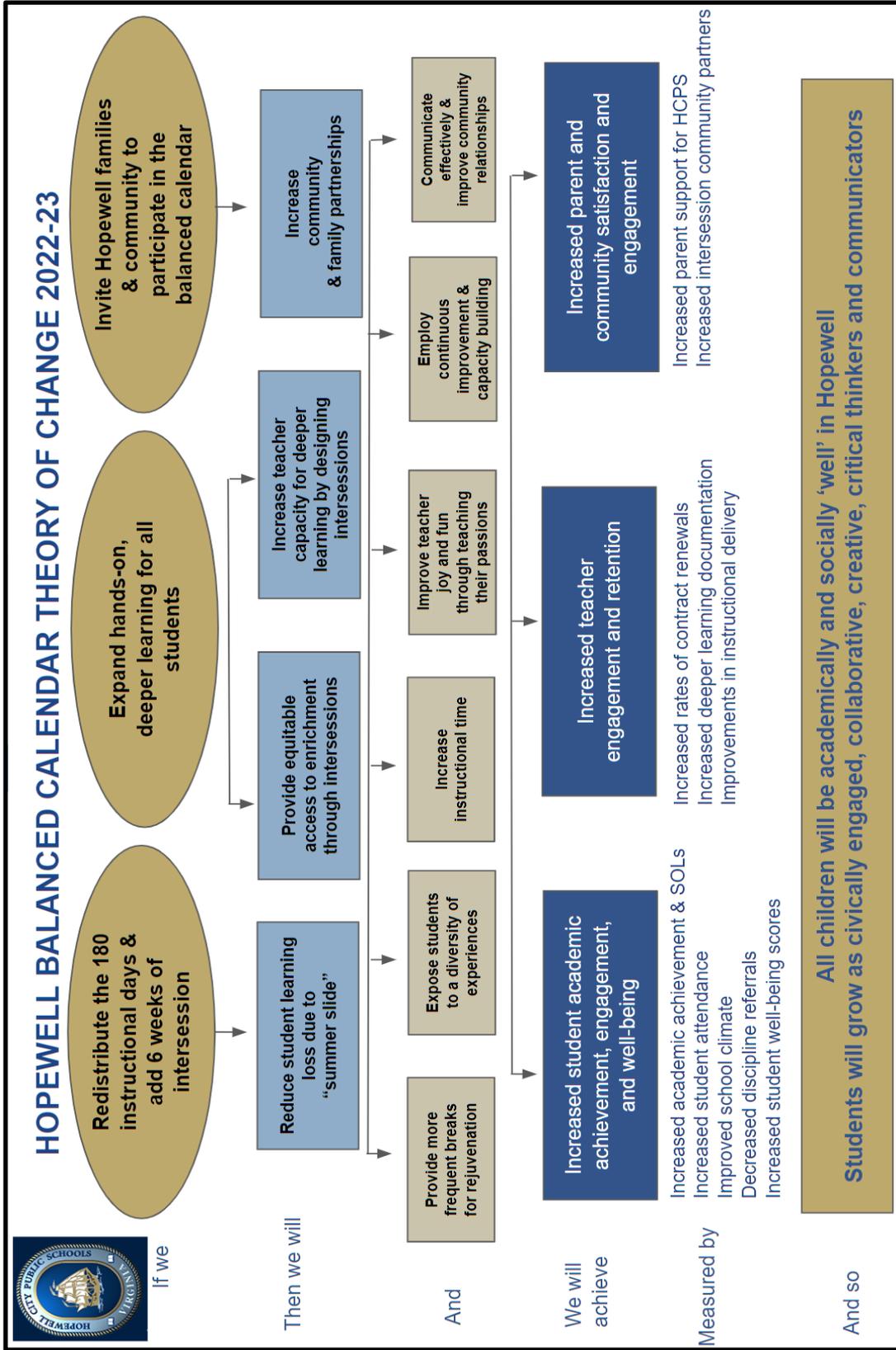
Increased Parent Satisfaction	To what extent do parents report satisfaction with intersession courses?	Increased rate of parents reporting their children enjoy the intersession courses.	Year 1: 50% of parents whose children attend intersessions report their children enjoy the courses.  Year 2: 70% of parents whose children attend intersessions report their children enjoy the courses.	Parent Surveys  Interviews/Focus Groups	Completed Parent Surveys  Transcripts	After each intersession week  Bi-annually
	To what extent do parents report satisfaction with the balanced calendar and HCPS?	Increased rate of parents reporting they are satisfied with the balanced calendar.	Year 1: 50% of parents surveyed state they are satisfied with the balanced calendar and HCPS  Year 2: 70% of parents surveyed state they are satisfied with the balanced calendar and HCPS	Parent Surveys  Interviews/Focus Groups	Completed Parent Surveys  Transcripts	Annually
Increased Community Investment in HCPS	To what extent do community businesses partner with HCPS during intersession courses?	Increased rate of businesses and organizations actively partnering with HCPS during intersessions.	Year 1: Baseline data collected  Year 2: 10% increase in the number of business/organizations partnering with HCPS	Record of businesses partnering with intersession course teachers		Annually

## EVALUATION MATRIX

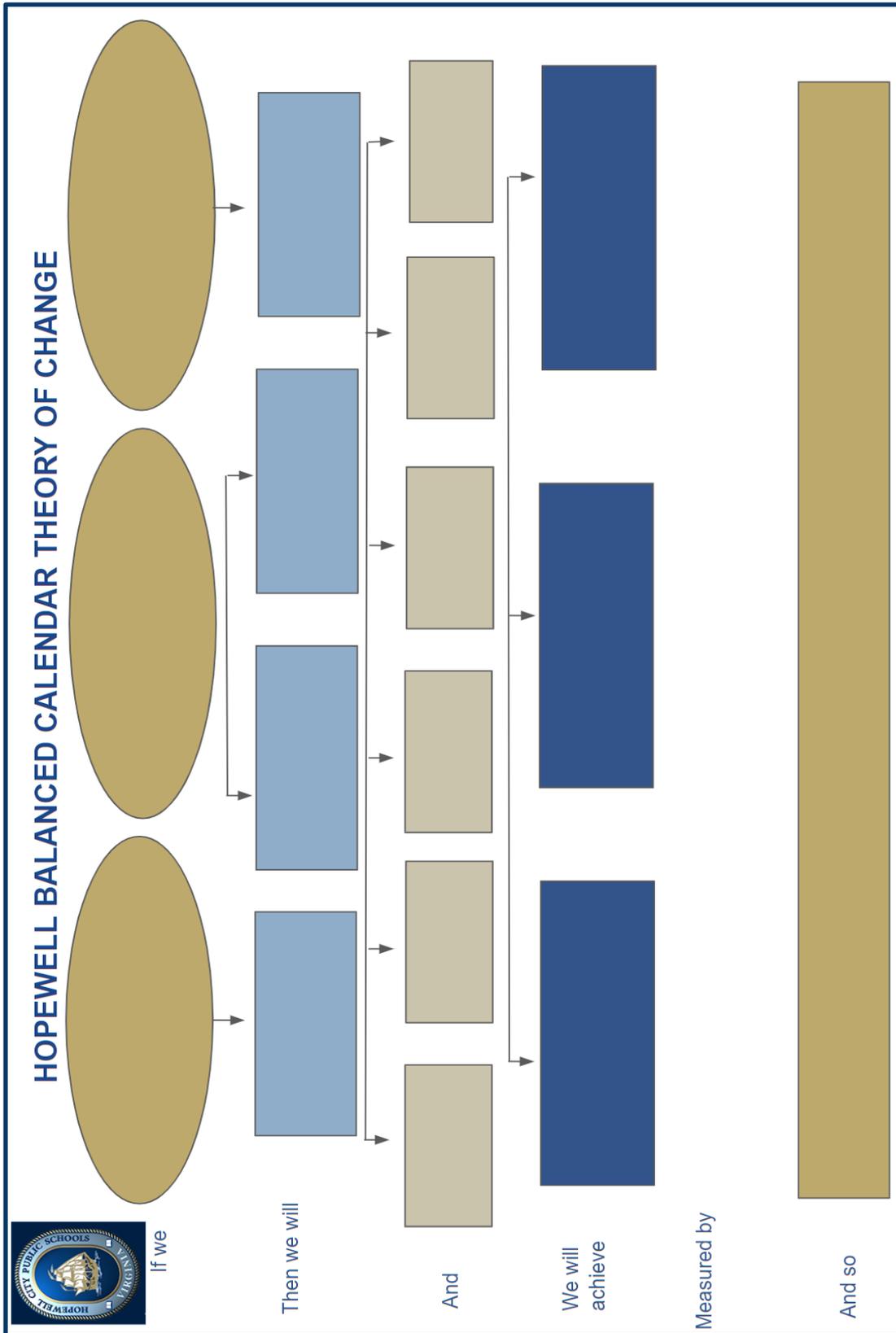
### Summative Stage: Ongoing 2023-2026+

Outcomes	Sample Evaluation Questions	Indicators	Sample Targets	Data Collection Methods	Data Sources	Data Collection Frequency
Increased Student Engagement	How often are students absent from school?	Reduction in chronic absences	Year 1: Baseline data collected	Regular school attendance	PowerSchool	Quarterly
Increased Student Well-Being	To what extent is student well-being increasing due to the balanced calendar?	Improved <a href="#">Wayfinder</a> scores	Year 1: Baseline data collected Year 2: Increase by 20%	<a href="#">Wayfinder Assessment</a>	Completed Wayfinder Surveys	Each week throughout the school year including intersession weeks (for students who attend)
		Improved School Climate Survey scores	Year 1: Baseline data collected Year 2: Increase by 20%	School Climate Survey	VDOE Reported Results	Every two years
Increased Student Achievement	To what extent did student achievement increase?	Increased SOL scores	Year 1: Baseline data collected Year 2: Decrease in the failure rate by 10%	SOL Reading & Math Assessments K-8, Writing Assessment grade 8, and End of Course SOL assessments	VDOE SOL Reported Results	Annually at the end of each year
		Improved growth in math and reading	Year 1: Baseline data collected	<a href="#">MAP Reading and Math Growth Assessment</a>	NWEA MAP	Annually
		Improved grades	Year 1: Baseline data collected	Grade Reports K-12	PowerSchool	Annually
Increase Teacher Engagement & Well-being	How often are teachers absent from school?	Decrease in teacher absences	Year 1: Baseline data collected Year 2: Decrease by 5% the number of absences	Teacher absences	Substitute Information System	Annually
	To what extent are teachers voluntarily leaving HCPS to teach in other divisions?	Increased retention rate of teachers	Year 1: Baseline data collected	Exit Interviews	Human Resource Information Management System	Annually

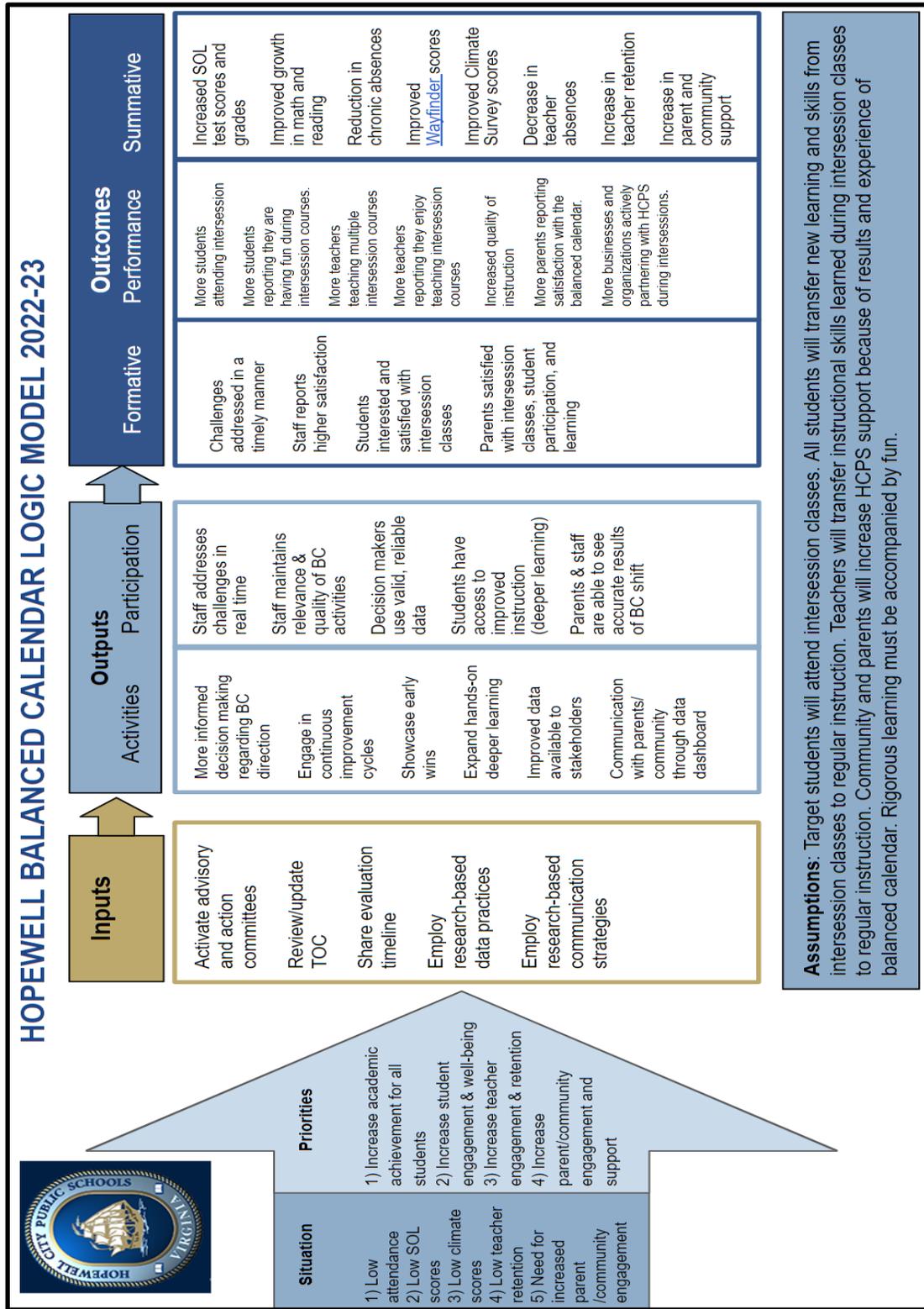
# THEORY OF CHANGE 2022-23



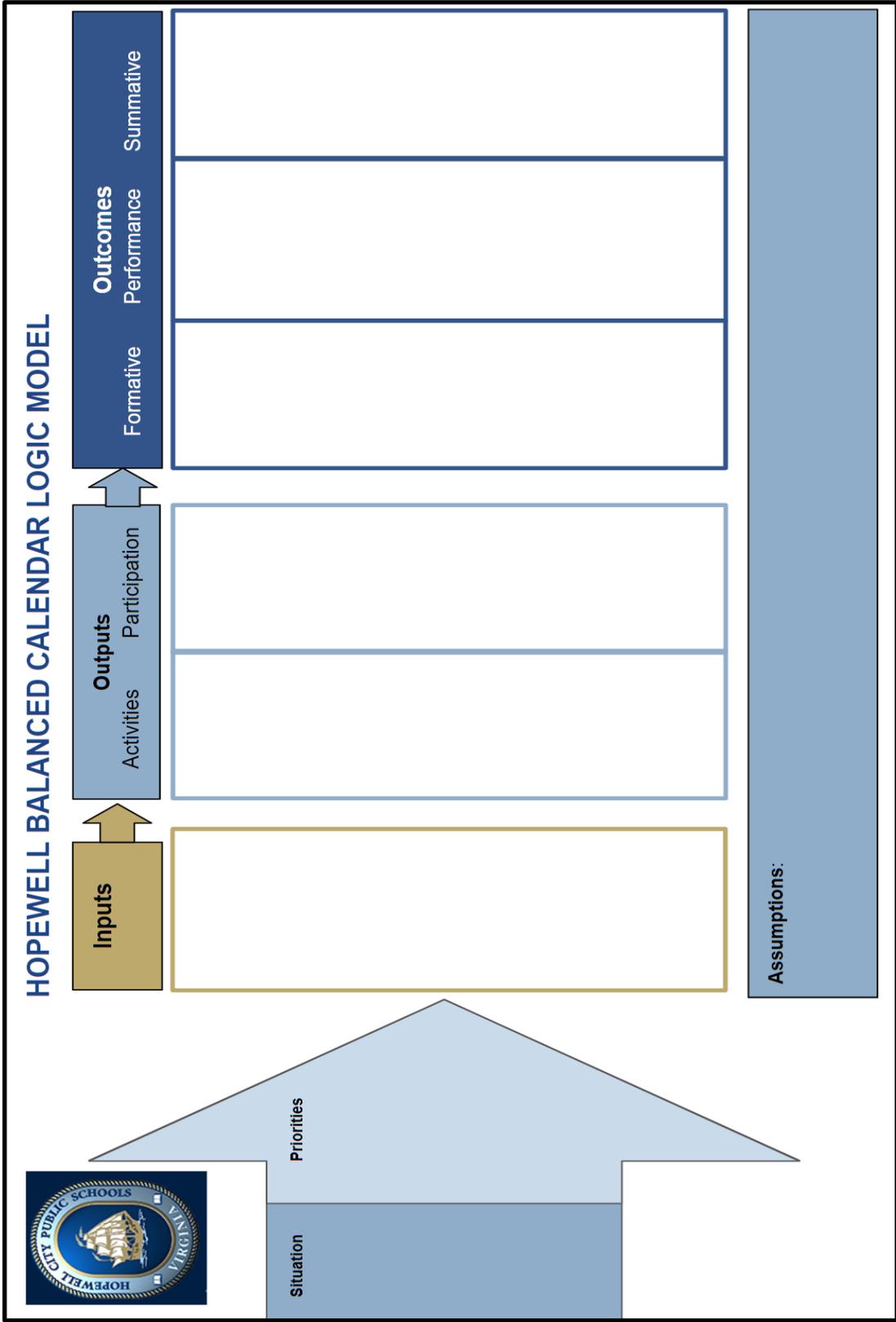
# THEORY OF CHANGE TEMPLATE



# LOGIC MODEL 2022-23



# LOGIC MODEL TEMPLATE



## CROSSWALK OF EVALUATION BEST PRACTICES AND RECOMMENDED ACTIONS

Evaluation Best Practices	Recommended Actions for HCPS
Engage Stakeholders	Form Action Team and Advisory committee
Develop Theory of Change and Logic Model	Review and Update the Theory of Change and Logic Model
Determine Types & Timing of an Evaluation	Publicize an Evaluation Timeline for each Phase of the Balanced Calendar Implementation
Generate Evaluation Questions	Select Reliable Data Sources that Align with the Goals of the Balanced Calendar
Identify Data Collection Methods & Create Evaluation Matrix	
Analyze & Interpret the Results	Iterate Balanced Calendar Innovations through Improvement Cycles
Engage in Improvement Cycles	
Ongoing Communication with All Stakeholders	Showcase Early Wins  Tailor Communication to Intended Audiences & Consider Using a Data Dashboard

## INTERACTIVE DATA DASHBOARDS

Data dashboards are visually compelling, interactive web-based displays that can be effective to share complex information, such as the impact of the balanced calendar. By selecting filters and interacting with the data, users of data dashboards develop better understandings of complex data compared to understandings gained from interacting with static data displays (Nadj et al., 2020).

However, data dashboards have some significant limitations that HCPS should carefully consider. First, the data dashboard end user must be technologically skilled to filter the data and must use a device with screen size sufficient to filter the data. Second, data dashboards need to be carefully designed using complex coding systems, which may require HCPS to make a significant investment in technical support. Third, the data used for a dashboard should be both dynamic and accurate; until HCPS has additional sources of evaluation data about the balanced calendar effectiveness, the data available to interact with on the dashboard will be limited.

**Thus, our research indicates that a data dashboard may not be the optimal method of sharing information about the balanced calendar with many HCPS families.** However, HCPS may choose to create a data dashboard primarily for audiences such as the VDOE, General Assembly, school board members and other school divisions.

The checklist below and the design recommendations that follow offer some guidance for consideration if HCPS decides to create a data dashboard.

### Checklist for Effective Design of Data Dashboards

<b>Message</b>	<ul style="list-style-type: none"><li>● Use clear language</li><li>● Target message to user groups</li><li>● Be consistent when using technical terms</li><li>● Use qualitative data in context</li></ul>
<b>Graphic Design &amp; Displays</b>	<ul style="list-style-type: none"><li>● Avoid visual clutter: shading, colorization, unnecessary figures</li><li>● Keep organization simple and purposeful</li><li>● Maintain consistency in the design theme</li><li>● Use contrast, repetition, and alignment to guide the reader</li></ul>
<b>Functionality</b>	<ul style="list-style-type: none"><li>● Reflect interests of targeted user groups</li><li>● Test with representatives of user groups</li><li>● Update data regularly from valid and reliable data sources</li></ul>

(Williams, 2015; W. K. Kellogg Foundation, 2017; Ahn et al., 2019)

# INTERACTIVE DATA DASHBOARDS

## Potential Pages for Balanced Calendar Data Dashboard

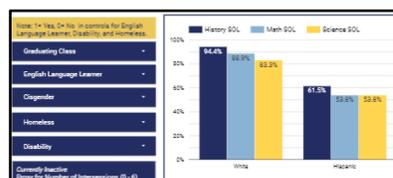
### Title Page

- Explanation of the dashboard's intended purpose & design
- Clear instructions for how to use functionality in the dashboard
- Introduction of guiding icons users will encounter throughout the dashboard
- An interactive timeline highlighting the phases of the initiative
- Supporting quotes from recognizable HCPS officials or students



### Student Academic Achievement Page

- Filter by age, gender, school, grade
- Use understandable graphic representation to tell the story
- Include survey responses focused on growth and knowledge gain  
*Did students gain competence with the material? Did students develop new skills? Do students perceive learning as valuable?*
- Represent academic change over time
- Capture post-secondary outcomes including college and technical school enrollment and completion



### Student, Parent, and Staff Engagement Page

#### Attendance

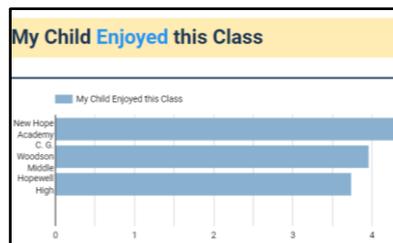
- Comparison between students who did and did not participate in intercession for daily school attendance.

#### Satisfaction

- Side by side comparison of family and student responses to survey questions such as the following:  
*Did students enjoy the course? Did the course provide new opportunities? Would students/parents recommend the course?*

#### School community

- Side by side comparison of family and student responses to  
*Do students/families like the school? Do students/families feel like they belong at the school? Are students/families proud to be part of the school?*





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