NORTH CAROLINA
State Board of Education
Department of Public Instruction

# Report to the North Carolina General Assembly

## Final External Evaluation of the Innovative School District

*Session Law 2016-110*

**Date Due: March 1, 2024**

DPI Chronological Schedule, 2023-2024

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## EXECUTIVE SUMMARY

In 2016, the North Carolina General Assembly passed legislation to create a nongeographic school district, known as the Innovative School District (ISD), to improve student academic performance among consistently underperforming elementary schools. Southside-Ashpole Elementary School in Robeson County remains the only school to enter into the ISD.

With the program coming to an end at the conclusion of the 2022-2023 school year, the North Carolina Department of Public Instruction partnered with the Sanford Policy Team to analyze student and family outcomes within the ISD system per reporting requirements specified within North Carolina general assembly statute Chapter 115C. The policy team performed a student achievement comparison using school report card scores, a cross-state comparison, and stakeholder interviews to answer the following policy questions:

1. What are the academic outcomes for students and families who attended the North Carolina Innovative School District?
2. Given these findings, what policy recommendations could be made to the NC State Board of Education and NC General Assembly?

After completing the analysis, the team found that the ISD had positive impacts on students and families but could have performed better if the organization devised a more efficient, repeatable strategy for school turnaround due to challenges with school selection, operator capacity, staff turnover, and district management. Based on these findings, the team's research and analysis conclude with the following recommendations:

- Increase flexibility and funding for struggling schools without handing over control to the state.
- Implement solutions that work for North Carolina's specific education landscape.
- Invest in new and innovative pathways for developing a more robust pool of high-quality teachers, school-leaders, and school operators.
- Increase collaboration with local education agencies and community leaders.

As an addendum to the initial analysis by the policy team at Sanford, NCDPI utilized the North Carolina Teacher Working Conditions (NC TWC) Survey to analyze the impact of the ISD on Southside-Ashpole staff members. To contextualize the changes in NC TWC Survey response data from pre- and post-ISD implementation, the state compared Southside-Ashpole's response data to four comparison groups that were originally designed by the Friday Institute for an initial evaluation of the district (Stallings, et. al, 2020).

Overall, the NC TWC Survey data analyzed for this evaluation suggests that Southside-Ashpole potentially benefited from the additional financial support and flexibility, when paired with a stable leadership team, allowed Southside-Ashpole to improve teacher conditions by investing in better family engagement strategies, curricula, and professional development opportunities.

The second phase of this analysis builds on the initial report but also introduces the experience of parents and families. Phase Two of the Southside-Ashpole ISD project focused on parent and family perspectives. The two parents that were interviewed for this evaluation shared insight and provided recommendations based on their unique experiences during the implementation of ISD at their child's school. Following the data analysis of the parent interviews, four themes emerged. These included: Barriers to Academic Progress, Strong School Leadership, Encouraging and Committed Teachers, and the Importance of Stability. The interview findings are not generalizable due to the limited sample size, but are transferable in that this adds to the perspective of these experiences and provides valuable insight to a significant group in the school community.

Based on the findings from parent and family interviews, it is recommended that future iterations of innovative school districts establish a comprehensive plan for parental engagement and introduce intentional strategies to collaborate with parents during the implementation process. Family engagement connects parents with opportunities to be active members of their school community and builds shared responsibility and mutual respect between some of the most influential actors in a child's academic development (Waterford.org, 2023).

The Sanford Policy Team recommended collaboration and transparency across local educational agencies and with teachers does not speak explicitly to the role of families. The team also emphasized existing barriers to implementation and recommended that flexibility and pathways for support be prioritized in the ISD transition process moving forward. Policy questions for 'turn around models' to consider are: should there be structures to these types of transitions for families and what additional supports are needed when there are significant organizational changes that occur in a school setting? These policy recommendations presented in this phase of the project focused on challenges identified by parents and aimed to address barriers to family engagement at Southside-Ashpole.

## BACKGROUND

The North Carolina Department of Public Instruction (NCDPI) is led by the State Superintendent and is responsible for implementing the state's PreK – 12th grade public school legislation and providing consultation to the 115 local public-school districts of North Carolina.[1] Over the past twenty-five years, North Carolina's Supreme Court has consistently ruled that the state is failing to provide "a sound basic education" for every child across the state due to notably low levels of education funding and significantly lower levels of student proficiency within disadvantaged student populations.[2][3] As a result of the lack of investment in education, students' scores in North Carolina on literacy and math examinations in 2015 were lower than students in 32 states/jurisdictions, leading to a large number of failing schools within the state.[4] In 2016, the General Assembly of North Carolina attempted to address this issue by enacting House Bill 1080, which established the Innovative School District (ISD), a centralized school district under the supervision of the Department of Public Instruction and the State Board of Education.[5] The ISD was designed to identify and take over five chronically low-performing public schools.[6] With more than 20% of North Carolina's public schools receiving a D or F grade for the 2016/2017 school year, the ISD was created in the hopes that it could "design and implement strategies for school improvement, creating innovative conditions for accelerating student achievement" that could eventually be used across the state.[7]

**Figure 1.** *More than 500 schools received an overall performance grade of D or F during the 2016/2017 SY in North Carolina*

| School Year | Grades | | | | |
|---|---|---|---|---|---|
| | A / A+NG (185) | B (650) | C (979) | D (435) | F (85) |
| 2016/2017 | 7.1% | 28.1% | 42.3% | 18.8% | 3.7% |

At the program's inauguration, the State Board of Education set out to select five qualifying schools for transfer to the ISD beginning in the 2018-2019 academic year. In 2018, ISD partnered with an independent evaluation development team—composed of staff from the Friday Institute at North Carolina State University and RTI International—to develop a multi-year plan for assessing outcomes of the initiative. The ISD partnered with the Friday Institute to conduct the evaluation. After running into significant issues with staff-turnover, push-back from school districts about the policy, and the inability to find high-quality operators, the ISD will be terminated at the end of the 2022-2023 school year with only one school in the district.[8][9][10]

With the program ending at the conclusion of the 22/23 school year, NCDPI requested help to complete Chapter 115C's requirement that the State Board of Education and the Superintendent of the ISD report to the Joint Legislative Education Oversight Committee on the "progress" of every ISD

school.[12] As a part of this report, NCDPI partnered with the Sanford Policy Team to evaluate the following policy questions[13]:

1. What are the outcomes for students and families who attended the North Carolina Innovation School District (ISD)?
2. Given these findings, what policy recommendations could be made to the North Carolina State Board of Education and the North Carolina General Assembly?

## METHODOLOGY

### QUANTITATIVE AND QUALITATIVE

To evaluate the ISD and provide the state with recommendations, the team analyzed student achievement data, completed a cross-state comparison between North Carolina's Innovative School District and Tennessee's Achievement School District, and conducted interviews to obtain stakeholder views.

## ANALYSIS

### STUDENT ACHIEVEMENT

To evaluate the outcomes for students who attended the North Carolina ISD, the team used overall school performance scores to compare Year 1 and Year 4 achievement at Southside-Ashpole to comparable schools.[1] For more information about how the school performance score is calculated, see Appendix A. Comparison schools were selected from four comparison groups identified by the Friday Institute in its Year II Evaluation of the ISD.[14]

The first comparison group is comprised of two schools that were characteristically similar to Southside-Ashpole's demographic profile during the 2018/2019 school year. The second group includes "ISD Finalist" schools, which are schools selected from the ISD Selection List by the State Board of Education for potential takeover. The third group includes "ISD Selection List" schools, which are the schools that qualify for ISD takeover based on their status as a bottom 5% school in the state. The criterion for eligibility on the Selection List was originally specified within House Bill 1080 but was updated within Senate Bill 522.[15]. The final comparison group consists of other Robeson County schools. For more information on our comparison group selection process, see Appendix A.

Our team utilized student achievement data to compare the change in student outcomes at Southside-Ashpole pre/post ISD implementation to comparable schools during the same time. However, no regression analysis was run on the school-level data due to the ISD only having "treated" one school.

[1] Year 2 and Year 3 overall performance scores were not calculated by the state because of the Covid-19 Pandemic.

Additionally, as is noted in the findings section, causal conclusions about the effectiveness of the Innovative School District should not be made based on the achievement results due to high student turnover rates during the evaluation period of the program.

### CROSS STATE COMPARISON

The team completed a cross-state policy comparison between North Carolina's ISD and Tennessee's Achievement School District, after which the ISD was modeled. To build a specific set of criteria, the team analyzed House Bill 1080 and identified the key framework components within the legislative design of the ISD, which include: Selection of ISD Schools, Selection of ISD Operators, Management of ISD Schools, and Funding for the ISD.

This comparative analysis identified the structural strengths and weaknesses of the ISD through looking at a similar policy designed for the same purpose. Both policies were evaluated in relation to their ability to successfully produce the "inputs" required for operators and schools to innovate and improve according to the ISD Logic Model.[16]

The logic model and full cross-state comparison can be found in Appendix B and Appendices (C - I) respectively.

### STAKEHOLDER INTERVIEWS

To gather qualitative data concerning the impact of the ISD on students' and families' attitudes/perspectives at Southside-Ashpole, our team conducted a series of interviews with an ISD administrator, as well as a principal and two teachers at Southside-Ashpole. For information about the specific questions asked in the interviews, see Appendices (J-L).

## FINDINGS

### STUDENT ACHIEVEMENT

*Finding 1. School Performance*

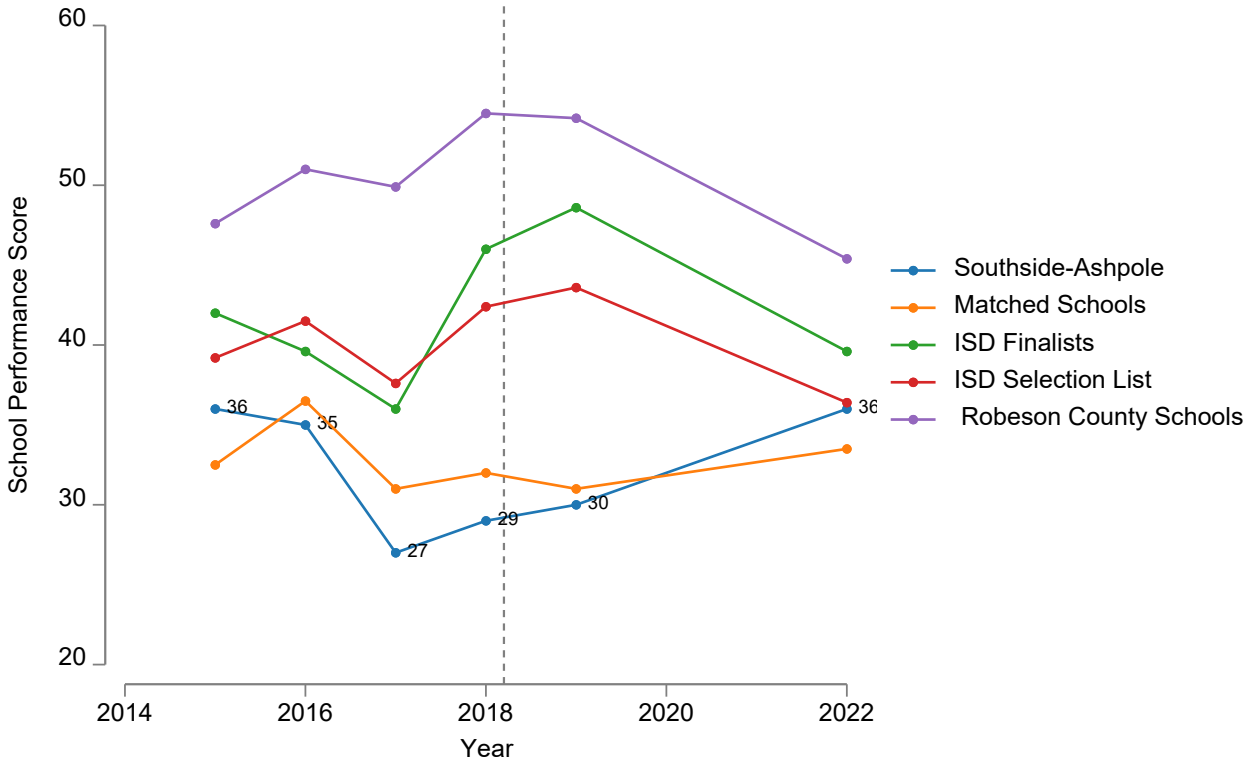
While overall achievement metrics are an important indicator of the ISD's effectiveness, the academic growth that Southside-Ashpole experienced cannot be fully attributable to the ISD due to significant changes in the student population during the evaluation period. After the first year of ISD implementation, Southside-Ashpole experienced a 15.1% reduction in students who qualify for free/reduced lunch from 2018/2019 to 2019/2020 (shown in Table 1). Due to this large change in the demographic make-up of the school, no causal claims should be made about the impact of the ISD based on school-level data.

**Table 1.** *Percent of Students Who Qualify for Free/Reduced Lunch at Southside-Ashpole: By Year*

| | School Year | | | |
|---|---|---|---|---|
| % of Students Eligible for Free/Reduced Lunch | 2018/20 19 | 2019/20 20 | 2020/20 21 | 2021/20 22 |
| Southside -Ashpole | 78% | 62.9% | 65.6% | 69.4% |

Notably, from a comparison standpoint, all five groups experienced similar performance trends during 2015/2016 – 2017/2018 (pre-ISD) school years, but then Southside Ashpole was the only school to experience gains for overall School Performance from 2018/2019 to 2021/2022 (post-ISD).[2] Based on overall School Performance Scores, Southside-Ashpole (the only school to enter into the ISD) increased overall school performance more than all four comparison groups since entering into the Innovative School District.[3]

**Figure 2.** *Innovative School District: School Performance Comparison*




## CROSS STATE COMPARISON

*Finding 2. Selection Process*

[2] Overall scores were not calculated by the state during the 2019/2020 and 2020/2021 school years because of the Covid-19 pandemic.

[3] For more information about the comparison groups, see Appendix 2.

By initially allowing the state to take over schools (with performance grades in the lowest 5%) without a waiting period, district leaders and community members felt that entering the Innovative School District was an unwarranted punishment.[17][18]. As a result, the ISD struggled to bring schools into the district, limiting the program's impact.

**Extending Evaluation Period.** To address this issue, the state legislature later adopted a three-year evaluation period to allow districts more time to show growth.[19] However, the ISD ended before any new schools were selected using the updated process.

**School Improvement Model**. An additional strategy would have been to offer a "school improvement grant intervention model" for schools that were placed on the qualifying list, as Tennessee did.[20] Such a program would add state level oversight while also providing additional support to local education agencies without the added burden of designing a full innovation zone.

*Finding 3. Local Context & Resources*

The policies in both North Carolina and Tennessee relied on contracting with highly qualified operators that could successfully lead school turnaround efforts. [21] [22]

**Local Operators.** While North Carolina did not receive bids from any operators that met their criterion, Tennessee was able to attract a stronger candidate pool. Additionally, ASD leadership took steps to develop local operators to ensure that the market could meet the state's needs. [23]

North Carolina's policy relied on attracting charter operators to the ISD that either had 1) a track record of "improving the performance of persistently low-performing schools" or 2) experience operating a school in combination with "a credible and specific plan for dramatically improving student achievement in a low-performing school.[24] However, only two operators applied to lead Southside-Ashpole and neither operator had the required experience/vision to meet the criterion.[25].

When the ISD could not find an operator that met its criterion, it proceeded with an underqualified candidate. This resulted in serious complications and eventually the early termination of the operator's contract.[26][27].

The lack of quality options during the process indicates that proponents of the legislation did not complete a landscape analysis to assess the suitability of the ISD program as an appropriate solution given North Carolina's specific context.

As the policy relied on effective operators to provide a specific vision and expertise for turning around low-performing schools, the policy would have been more effective if it had also attempted to stimulate the development of high-quality operator options, as Tennessee did.

*Finding 4. Funding*

**ISD Management.** One of the biggest differences between the Tennessee and North Carolina policies is the amount of money that was invested to develop a high-level state-run district. While Tennessee was able to utilize $8,133,276 in Race to the Top funding to build out a robust central office, the North Carolina ISD received no such funding [28]. Due to this discrepancy,

The Tennessee ASD was able to develop a vision and comprehensive supports for schools at the district level, while the ISD relied on operators to provide the vision and expertise, which prevented the district from developing a scalable model for school-turnaround efforts.

The ISD's lack of a robust central office prevented the ISD from producing scalable reforms and left success or failure up to individual leaders at the school level.[29] While the flexibility provided to the ISD eventually led to positive improvements at Southside-Ashpole, the flexibility only benefited the school when strong leadership was in place. [30]

The ISD organizational structure created an alignment issue between the district, operator, and teachers, as the principal was hired by the operator and the teachers were hired by the ISD. The lack of a vision and specific supports from the ISD compounded the problems that arose when the state could not get high-quality operators to bid for Southside Ashpole.

**In-School Support.** The ISD's ability to support Southside-Ashpole's state vetted improvement plan with additional funding provided a significant value-add to the school. [31]

## STAKEHOLDER INTERVIEWS

*Finding 5. Staffing*

**Turnover**. The constant turnover of both administrative staff and teachers did not make the school staff feel supported or cared for by the ISD system. The impact of frequent faculty, staff, and student turnover started to wear down on the education quality at the school.[4]

Teachers felt "isolated," unsupported, and uncared for due to the high level of administrator turnover and scrutiny of being the only ISD school.

Teachers felt they were unwanted by the public school system and were being punished for not meeting state standards.

Many parents and community members were distrustful of the ISD due to the constant staffing and leadership changes.

The high-levels of turnover caused by the ISD led to new teachers who were not prepared to teach the curriculum they were given. Under a different leadership team, new teachers received more professional development, but this came at the expense of focusing on other issues that the school faced.

The turnover rate could have potentially been reduced if teachers were compensated for the extra hours they were expected to work, had a stable leadership team, and if they had received consistent professional development throughout the life of the ISD.

*Finding 6. Investments In the School*

**Increased Resources and Support.** The Innovative School District helped deliver increased resources to Southside-Ashpole. If the school required additional resources, new technology, or curriculum support, the requests were processed quickly through the North Carolina Department of Public Instruction and funds were available to Southside-Ashpole for whatever improvements were needed.

*Finding 7. School-level Leadership*

**Transition to Stable Leadership**. The school improved once there was a stable leadership team and a principal who knew how to run a public school. The principal used the flexibility and funding opportunities provided by the ISD to make significant improvements to the building and staff. The ISD supported Southside-Ashpole with a large grant connected to the school's NC Star plan. The principal

[4] Reports from each interview are included in Appendix 4

relied on their experience, not recommendations or training from the ISD, for how to build trust and relationships with families and community members.

*Finding 8. Scalability*

**Principal Autonomy.** Due to the lack of a district office, more responsibilities fell on the principal's shoulders. The principal had more autonomy than a traditional public-school principal in North Carolina, but also more responsibilities. The ISD failed to provide a significant level of structure and support to produce a scalable system for school turnaround. According to all stakeholders interviewed, the primary source of improvement was a stable, experienced leader who knew how to utilize the autonomy and resources offered to the school.

## CONCLUSION AND RECOMMENDATIONS

The North Carolina ISD was a bold initiative designed to increase accountability and resources for the state's lowest performing schools. While there is clear evidence that conditions at Southside Ashpole improved after the ISD took over, there is a much larger body of evidence indicating that the policy was unable to build a scalable model for improving low-performing schools due to the lack of qualified operators, high-levels of staff turnover, and severe pushback from the communities impacted by the program.

As North Carolina continues to look for strategies that will help close the achievement gap, the state should continue to utilize strategies that support low-performing schools by increasing flexibility and resources but reduce the level of oversight required to access these opportunities. By partnering with local education agencies and school leaders, the state can ensure that schools are implementing best practices without the financial and logistical burden of doing it for them. The following policy recommendations are based on our findings of this evaluation:

- Increased flexibility can be a tool for innovation within schools when combined with the leadership, funding, and support required to execute a vision. The state should continue to look for pathways to connect flexibility with support but use state-approved plans, instead of state-led efforts to ensure that effective leaders have the resources they need to turn struggling schools around.
- The state legislature and state board of education should refrain from using strategies employed by other states without ensuring that the necessary funding, resources, and expertise are available to successfully implement the program. The ISD struggled to produce a scalable model for improving student outcomes because it needed more initial investment to build out a robust, state-wide school district, as well as the charter operators necessary to implement successful school turnaround efforts.
- The lack of high-quality charter operators available to support school turnaround efforts was a major barrier to the success of the ISD. The legislature should look for innovative strategies to invest in the development of high-quality operator options, as well as the teachers and school leaders required to work in challenging conditions. Additionally, the

state should increase compensation for teachers expected to work extended hours within schools targeted for school-turnaround efforts to avoid debilitating levels of staff turnover.

- As the state continues to look for new and effective strategies for supporting struggling schools and districts, transparency and collaboration with local education leaders will be essential for successful implementation of any new initiatives.

# APPENDICES

Phase I of Innovative School District Evaluation

Sanford School of Public Policy

## APPENDIX A

Matched School A and B were chosen for Analysis by the Friday Institute within the *North Carolina Innovative School District: Second-Year Results from Inaugural School (2019-20)*

Per the report:

"Based on the findings of Somers et al. (2013), since we have a large candidate pool of schools relative to the treated schools, and since we have more than two years of pre-intervention test data, we use a radius matching (propensity scores within 0.25 SD of each treatment school's score) strategy, which matches each treatment school to several schools within a given propensity score range, increases the size of the comparison pool, and likely has little impact on bias because of the depth of pre- intervention data available for matching."

For more information, See *North Carolina Innovative School District: Second-Year Results from Inaugural School (2019-20)*

| | | School Performance Scores: | | | | | |
|---|---|---|---|---|---|---|---|
| Group | School | SY2015 | SY2016 | SY2017 | SY2018 | SY2019 | SY2022 |
| 1 | Southside-Ashpole Elementary | 36 | 35 | 27 | 29 | 30 | 36 |
| 2 | Matched School A | 29 | 33 | 33 | 39 | 36 | 34 |
| 2 | Matched School B | 36 | 40 | 29 | 25 | 26 | 33 |
| 3 | Glenn Elementary | 39 | 36 | 37 | 50 | 42 | 47 |
| 3 | Lakewood Elementary | 38 | 35 | 35 | 37 | 55 | 39 |
| 3 | Willis Hare Elementary | 49 | 48 | 36 | 51 | 49 | 33 |
| 4 | Harvey R Newlin Elementar | 40 | 42 | 37 | 42 | 43 | 29 |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| 4 | Hillcrest Elementary | 50 | 47 | 34 | 34 | 42 | 40 |
| 4 | Wadesboro Primary | 36 | 39 | 43 | 40 | 37 | 31 |
| 4 | Liberty Drive Elementary | 52 | 53 | 42 | 47 | 41 | 33 |
| 4 | Wallace Elementary | 49 | 47 | 41 | 52 | 47 | 40 |
| 4 | Eno Valley Elementary | 37 | 37 | 36 | 38 | 50 | 50 |
| 4 | Fayetteville Street Elementary | 43 | 44 | 38 | 46 | 40 | 41 |
| 4 | Stocks Elementary | 30 | 33 | 32 | 34 | 37 | 38 |
| 4 | Forest Park Elementar | 40 | 32 | 29 | 33 | 41 | 25 |
| 4 | Gibson Elementary | 37 | 30 | 35 | 45 | 54 | 39 |
| 4 | Diggs-Latham Elementary | 36 | 44 | 39 | 41 | 43 | 36 |
| 4 | Middle Fork Elementary | 33 | 31 | 34 | 30 | 40 | 26 |
| 4 | North Hills Elementary | 42 | 49 | 37 | 39 | 48 | 35 |
| 4 | Old Town Elementary | 43 | 49 | 42 | 43 | 39 | 46 |
| 4 | Ceasar Cone Elementary | 33 | 36 | 34 | 39 | 36 | 32 |
| 4 | Gillespie Park Elementary | 29 | 37 | 33 | 43 | 40 | 33 |
| 4 | Washingto n Elementary | 38 | 41 | 41 | 39 | 44 | 41 |
| 4 | Ahoskie Elementary | 42 | 47 | 41 | 40 | 39 | 36 |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| 4 | Riverview Elementary | 40 | 46 | 42 | 49 | 51 | 33 |
| 4 | Northeast Elementary | 34 | 40 | 42 | 47 | 42 | 32 |
| 4 | Walter G Byers School | 36 | 39 | 38 | 45 | 52 | 44 |
| 4 | A H Snipes Acad of Arts/Design | 39 | 41 | 35 | 41 | 43 | 36 |
| 4 | Grifton | 42 | 46 | 34 | 46 | 54 | 42 |
| 4 | South Greenville Elementary | 35 | 41 | 41 | 38 | 34 | 34 |
| 4 | Rosenwald Elementary | 33 | 28 | 35 | 45 | 43 | 28 |
| 4 | Walter Bickett Elementary | 39 | 46 | 38 | 50 | 54 | 36 |
| 4 | Brodgen Primary | 38 | 48 | 42 | 42 | 48 | 39 |
| 4 | Eastern Wayne Elementary | 46 | 48 | 41 | 48 | 49 | 39 |
| 4 | Margaret Hearne Elementary | 45 | 45 | 37 | 54 | 35 | 42 |
| 5 | Deep Branch Elementary | 34 | 47 | 51 | 53 | 53 | 37 |
| 5 | East Robeson Elementary | 71 | 74 | 77 | 78 | 85 | 77 |
| 5 | Green Grove Elementary | 58 | 61 | 55 | 64 | 66 | 31 |
| 5 | Long Branch Elementary | 46 | 46 | 49 | 57 | 59 | 46 |
| 5 | Magnolia Elementary | 35 | 37 | 43 | 44 | 59 | 51 |
| 5 | Oxendine Elementary | 42 | 44 | 42 | 53 | 53 | 45 |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| 5 | Parkton Elementary | 49 | 53 | 52 | 53 | 41 | 40 |
| 5 | Pembroke Elementary | 42 | 52 | 45 | 51 | 53 | 43 |
| 5 | Peterson Elementary | 38 | 43 | 34 | 43 | 44 | 33 |
| 5 | Piney Grove Elementary | 46 | 55 | 51 | 48 | 41 | 36 |
| 5 | Prospect Elementary | 49 | 48 | 48 | 53 | 59 | 51 |
| 5 | Rex-Rennert Elementary | 43 | 34 | 35 | 40 | 40 | 35 |
| 5 | Rowland Norment Elementary | 51 | 64 | 58 | 60 | 61 | 56 |
| 5 | St Pauls Elementar | 45 | 46 | 47 | 49 | 41 | 45 |
| 5 | Tanglewood Elementary | 65 | 76 | 73 | 78 | 73 | 56 |
| 5 | Union Chapel Elementary | 50 | 49 | 47 | 54 | 45 | 45 |
| 5 | Union Elementary | 57 | 52 | 54 | 59 | 59 | 47 |
| 5 | W H Knuckles Elementary | 36 | 37 | 38 | 44 | 45 | 44 |

**Key**

**Group 1:** ISD Schools (South-Side Ashpole)

**Group 2:** Matched Schools

**Group 3:** ISD Finalists (that have not merged or closed)

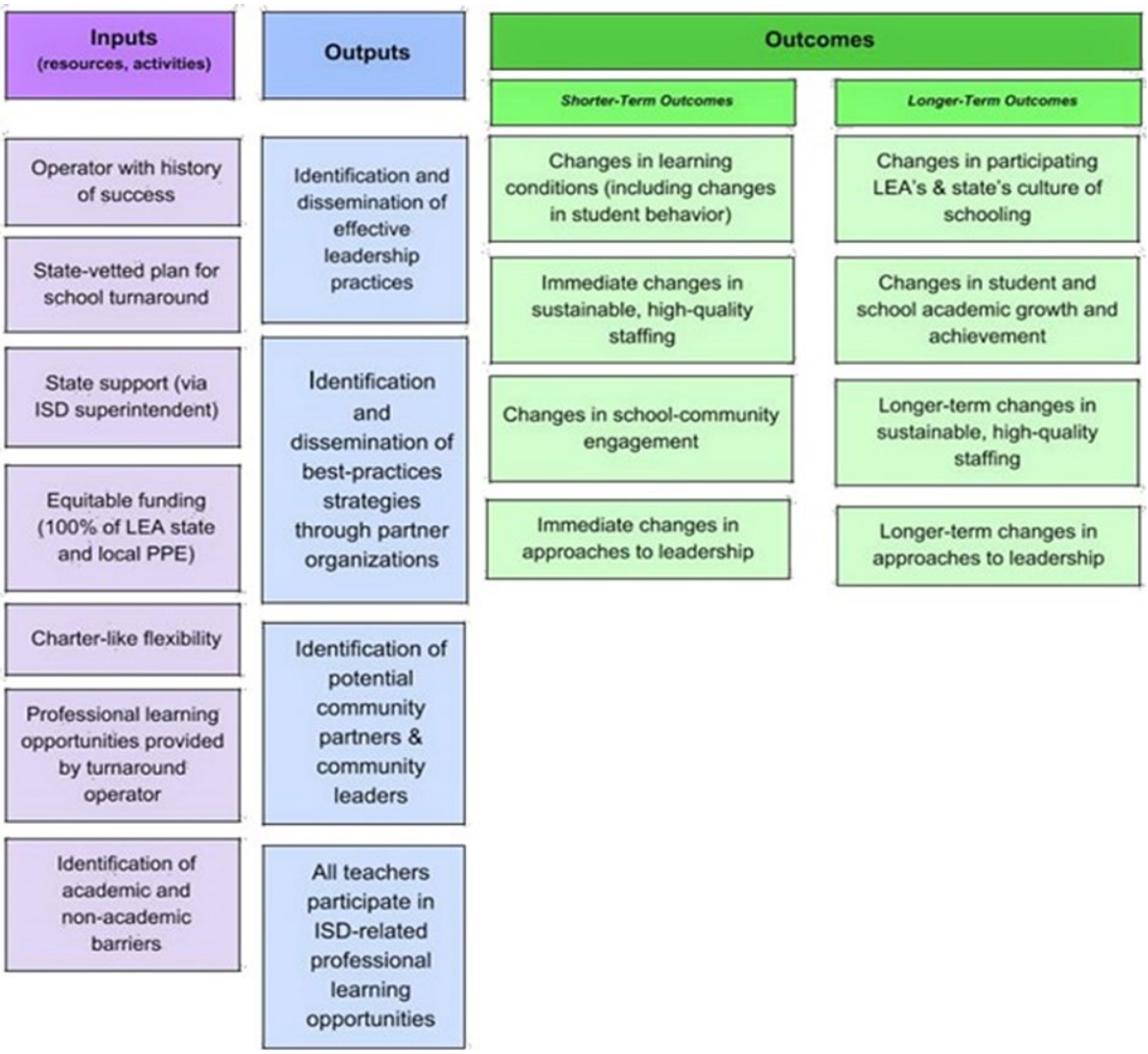
**Group 4:** ISD Selection List

**Group 5:** Robeson County School

## APPENDIX B

Innovative School District Logic Model

Inputs and Outcomes of Interest for the North Carolina – Tennessee Comparison. This logic model was developed by the ISD Superintendent's team in coordination with the Friday Institute.



## APPENDIX C

North Carolina and Tennessee Comparison based on ISD Logic Model

THIS ANALYSIS USES THE ISD LOGIC MODEL TO ANALYZE THE DESIGN OF THE ISD IN COMPARISON WITH TENNESSEE'S ACHIEVEMENT SCHOOL DISTRICT, WHICH THE ISD WAS MODELED OFF OF.

***115C-75.7. SELECTION OF ACHIEVEMENT SCHOOLS***[5]

"*The ASD Superintendent shall evaluate and identify the qualifying schools to recommend for selection as prospective achievement schools no later than November 15 prior to the initial school year in which the school may operate as an achievement school and shall notify the local boards of education where prospective achievement schools are located by that date. The State Board of Education shall select the prospective achievement schools no later than January 15.*"

| INPUT: N/A | |
|---|---|
| SIMILARITIES | DIFFERENCES |
| • Both models chose schools from the bottom 5% of the state<br>• Both models offered a state takeover option and innovation zone option (district-led). | **North Carolina:**<br>• The ISD did not establish a waiting period for schools to demonstrate academic improvement (changed in 2019 legislation update).<br>• Program ended before updated strategy was used to select a school.<br>**Tennessee:**<br>• ASD Model allowed low-performing schools to implement a district-led "school improvement grant intervention model" before being taken over by the state.[40] |

[5] Note that the legislation included at the top of each section is pulled from North Carolina House Bill 1080. The legislation refers to the "Achievement School District," but is referencing what later became "The Innovation School District."

**Findings:**

By initially allowing the state to take over schools (with performance grades in the lowest 5%) without a waiting period, district leaders and community members felt that entering the Innovative School District was an unwarranted punishment.[41],[42]

- To address this issue, the state legislature later adopted a three-year evaluation period to allow district more time to show growth.[43]
- An additional strategy would have been to offer a "school improvement grant intervention model" for schools that were placed on the qualifying list, as Tennessee did.[44] Such a program would add state-level oversight while also providing additional support to local education agencies without the added burden of designing a full innovation zone.

## APPENDIX D

North Carolina and Tennessee Comparison based on ISD Logic Model

**SELECTION OF ISD OPERATORS**

***115C-75.8.*** *SELECTION OF AS OPERATORS*

*Upon the recommendation of the ASD Superintendent, the State Board of Education shall only select an entity to contract as an AS operator if that entity demonstrates one of the following:*

(1) *The entity has a record of results in improving performance of persistently low-performing schools or improving performance of a substantial number of persistently low-performing students within a school or schools operated by the entity in this State or other states.*

(2) *The entity has a credible and specific plan for dramatically improving student achievement in a low-performing school and provides evidence that the entity, or a contractual affiliate of such an entity, is either currently operating a school or schools in this State that provide students a sound, basic education or demonstrating consistent and substantial growth toward providing students a sound, basic education in the prior three school years*

| INPUT: OPERATOR WITH A HISTORY OF SUCCESS | |
|---|---|
| SIMILARITIES | DIFFERENCES |

| | |
|---|---|
| • Both states had strong requirements for which operators could apply to run an ISD or ASD school. | **North Carolina:**<br>• While North Carolina had a robust criterion for operator applicants, the state was not able to find an operator that met their requirements.[45] Neither of the two operators that applied had a proven track record of improving results for low-performing students or a credible vision for how to do so in combination with experience operating a school.<br><br>**Tennessee:**<br>• Tennessee had a stronger operator applicant pool (in terms of the operators that applied for contracts) and the ASD leadership took specific steps to develop local operators, based on their understanding that quality operators are a limited commodity.[46] |

**Findings:**

The policies in both states relied on contracting with highly qualified operators that could successfully lead school turnaround efforts.[47] [48] While North Carolina did not receive bids from any operators that met their criteria, Tennessee was able to attract a stronger candidate pool. Additionally, ASD leadership took steps to develop local operators to ensure that the market could meet the state's needs.[49]

- North Carolina's policy relied on attracting charter operators to the ISD that either had **1)** A track record of "improving the performance of persistently low-performing schools" or **2)** Experience running a school in combination with "a credible and specific plan for dramatically improving student achievement in a low-performing school" along with experience running a school.[50] However, only two operators applied to lead Southside-Ashpole and neither operator had the required experience/vision to meet the criteria.[51]

- The Innovative School District had specific and high-quality criteria for selecting operators. However, when the program could not find an operator that met its criteria, it proceeded with an under-qualified candidate. This resulted in serious complications and eventually the early termination of the operator's contract.[52]
- The lack of quality options during the process indicates that proponents of the legislation did not complete a landscape analysis to assess the suitability of the ISD program as an appropriate solution given North Carolina's specific context.
- As the policy relied on effective operators to provide a specific vision and expertise for turning around low-performing schools, the policy would have been more effective if it had also attempted to stimulate the development of high- quality operator options.

## APPENDIX E

North Carolina and Tennessee Comparison based on ISD Logic Model

**MANAGEMENT OF ISD SCHOOLS 115C-75.9**

*Achievement School Employees. – The AS operator shall select and hire the school principal for an achievement school. Within the limits of the school budget, the AS operator or its designee shall select staff members in accordance with guidance from the ASD Superintendent. Before finalizing staffing recommendations, the AS operator and the ASD Superintendent or the Superintendent designee shall interview all existing staff members at the qualifying school and review student growth and performance data for*

*those staff members for whom it is available. Notwithstanding Article 21A of this Chapter, the AS operator and the ASD Superintendent shall be permitted to examine personnel files of existing staff members for the qualifying school. The AS operator shall have the authority to decide whether any administrator, teacher, or staff member previously assigned to a qualifying school selected to become an achievement school shall continue as an employee of the achievement school.*

***115C-75.6***

*There is established the Achievement School District (ASD) under the administration of the State Board of Education. The ASD shall assume the supervision, management, and operation of elementary schools that have been selected as achievement schools pursuant to this article.*

| INPUT: STATE SUPPORT | |
|---|---|
| SIMILARITIES | DIFFERENCES |
| • Both states developed a central office and non geographic school district to oversee schools. | **North Carolina:**<br>• NC's legislation specifically stated that the Department of Public Instruction was not allowed to be selected as a school operator.[53]<br>• NC's legislation was designed such that the State Board of Education oversaw both the Innovative |

| | |
|---|---|
| | School District and the individual operators within it.[54] Additionally, the ISD operator hired the principal of the school, but the "educators and staff were state employees" who report directly to the ISD.[55]<br>• NC did not receive Race to the Top funds to build out a robust state-led district.<br>**Tennessee:**<br>• Tennessee's ASD established the Achievement Schools Team, led by an Executive Director, to assume responsibility for direct-run priority schools under its jurisdiction.[56] Tennessee's ASD had direct control over the operators within the district.<br>• Tennessee had a robust organizational set-up that provided ASD schools with assistance in their transition into the ISD as well as institutional resources and supports for equity and access among students, operations & data, human resources, strategic partnerships, and federal programs.[57] |

## APPENDIX F

North Carolina and Tennessee Comparison based on ISD Logic Model

<table>
<tr><td colspan="2">INPUT: CHARTER-LIKE FLEXIBILITIES</td></tr>
<tr><td>SIMILARITIES</td><td>DIFFERENCES</td></tr>
<tr><td><ul><li>Both States allowed schools within their respective innovation districts to operate with charter- like flexibility.[58]</li></ul><ul><li>These flexibilities allowed them to initiate staffing and leadership changes that helped increase innovation through greater staffing flexibility, new school leadership, reformed teacher- leadership roles, increased professional development opportunities, and robust curriculum changes.</li></ul></td><td>North Carolina: N/A<br><br>Tennessee: N/A</td></tr>
<tr><td colspan="2">INPUT: IDENTIFICATION OF ACADEMIC AND NON-ACADEMIC BARRIERS</td></tr>
<tr><td>SIMILARITIES</td><td>DIFFERENCES</td></tr>
</table>

| | |
|---|---|
| • Both policies intentionally focused on community engagement as a pathway for school improvement. | **North Carolina:**<br>• Due to the structure of the policy passed by the general assembly, the ISD had a small central office that failed to develop "an underlying robust theory of change.[59] The policy relied on the ISD operator to identify and develop strategies to address academic and non-academic barriers. [60]<br><br>**Tennessee:**<br>• The ASD legislation included a pilot program designed to test students as they enter kindergarten so that each ASD school could "determine how instruction should be targeted to best meet the learning needs of the students and to eliminate disparities in learning backgrounds.[61]" |

## APPENDIX G

North Carolina and Tennessee Comparison based on ISD Logic Model

<table>
<tr><td>SIMILARITIES</td><td>DIFFERENCES</td></tr>
<tr><td>• Both states originally planned to allow charter operators to make individual decisions about professional development opportunities.</td><td>North Carolina:<br>• The ISD administered frequent administrator and teacher classroom walkthroughs. The teachers at Southside-Ashpole also received support from the New Teacher Support Program and expansions made to expand professional development opportunities to make them better aligned to the staff's needs.[62]<br>Tennessee:<br>• The ASD requires each school to develop an “Annual Professional Development Plan” that is monitored by the school via “self-assessment” and by the district via “on-site visits” and “reports/results.”[63]</td></tr>
<tr><td colspan="2">INPUT: STATE-VETTED PLAN FOR SCHOOL TURNAROUND</td></tr>
<tr><td>SIMILARITIES</td><td>DIFFERENCES</td></tr>
<tr><td>• Both states require schools to utilize state-vetted improvement plans. [64] [65]<br>• Both districts were able to support schools with receiving additional funding to follow up on improvement plan goals. [66] [67]</td><td>North Carolina: N/A<br><br>Tennessee: N/A</td></tr>
<tr><td colspan="2">Findings:</td></tr>
</table>

One of the biggest differences between the Tennessee and North Carolina policies is the amount of money that was invested to develop a high-level state-run district. While Tennessee was able to utilize $8,133,276 in Race to the Top funding to build out a robust central office, the North Carolina ISD received no such investment.[68 ]. Due to this discrepancy, the Tennessee ASD was able to provide a vision and comprehensive supports for schools within the district, while the ISD relied on operators to provide the vision and expertise.

- The ISD's lack of a robust central office prevented the ISD from producing scalable reforms and left success or failure up to individual leaders at the school level.[69] While the flexibility provided to the ISD eventually led to positive improvements at Southside-Ashpole, the flexibility only benefited the school when strong leadership was in place. [70]
- ISD's organizational structure created an alignment issue between the district, operator, and teachers, as the principal was hired by the operator and the teachers were hired by the ISD.

## APPENDIX H:

North Carolina and Tennessee Comparison based on ISD Logic Model

**ISD SCHOOL FUNDS**

***115C-75.10***

*Designated Funding. – Funding shall be allocated to the ASD for the achievement school by the State Board of Education and local board of education as follows:*

*(1) The State Board of Education shall allocate the following to the ASD for each achievement school:*

a. *An amount equal to the average per pupil allocation for average daily membership from the local school administrative unit allotments in which the achievement school was located for each child attending the achievement school except for the allocations for **(i)** children with disabilities, **(ii)** children with limited English proficiency, and **(iii)** transportation. The State Board of Education shall provide the allocation for transportation to the local school administrative unit in which the achievement school is located.*

b. *An additional amount for each child attending the achievement school who is a child with disabilities. c. An additional amount for children with limited English proficiency attending the achievement school, based on a formula adopted by the State Board of Education*

| INPUT: EQUITABLE FUNDING | |
|---|---|
| SIMILARITIES | DIFFERENCES |
| • Both States used traditional per-pupil funding streams to allocate resources at the district and school level. | **North Carolina:**<br>• No specific additional funds were allocated to set up a state-wide school district.[71]<br>**Tennessee:**<br>• While funding for the ASD was designed to mirror what a traditional school district would receive, the program greatly benefited from $8,133,276 in Race to the Top funding that enabled the ASD to build out a robust central office.[72] |

**Findings:**

While the ISD enabled Southside-Ashpole to receive additional grant money from outside sources in the long-run, there was no initial funding allocation designated by the state legislature to develop a robust, state-led school district.[[73] In comparison, Tennessee, which benefited from a large Race to the Top grant, was able to build out a robust central office.

[74] This difference in initial funding appears to have impacted the state's ability to properly design, operate, and scale the program.

- The ISD's ability to support Southside-Ashpole's state-vetted improvement plan with additional funding provided a significant value-add to the school.

## APPENDIX I:

North Carolina and Tennessee Comparison based on ISD Logic Model

**ISD SCHOOL FUNDS**

***115C-75.10***

*Designated Funding. – Funding shall be allocated to the ASD for the achievement school by the State Board of Education and local board of education as follows:*

*(1) The State Board of Education shall allocate the following to the ASD for each achievement school:*

a. *An amount equal to the average per pupil allocation for average daily membership from the local school administrative unit allotments in which the achievement school was located for each child attending the achievement school except for the allocations for **(i)** children with disabilities, **(ii)** children with limited English proficiency, and **(iii)** transportation. The State Board of Education shall provide the allocation for transportation to the local school administrative unit in which the achievement school is located.*

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| INPUT: EQUITABLE FUNDING | |
|---|---|
| SIMILARITIES | DIFFERENCES |
| • Both States used traditional per-pupil funding streams to allocate resources at the district and school level. | **North Carolina:**<br>• No specific additional funds were allocated to set up a state-wide school district.[71]<br><br>**Tennessee:**<br>• While funding for the ASD was designed to mirror what a traditional school district would receive, the program greatly benefited from $8,133,276 in Race to the Top funding that enabled the ASD to build out a robust central office.[72] |

**Findings:**

While the ISD enabled Southside-Ashpole to receive additional grant money from outside sources in the long-run, there was no initial funding allocation designated by the state legislature to develop a robust, state-led school district.[[73] In comparison, Tennessee, which benefited from a large Race to the Top grant, was able to build out a robust central office.

[74] This difference in initial funding appears to have impacted the state's ability to properly design, operate, and scale the program.

- The ISD's ability to support Southside-Ashpole's state-vetted improvement plan with additional funding provided a significant value-add to the school.

## APPENDIX J

District-Level Administrator
Interview Protocol

1. Were the challenges at SA distracting from your other work?
2. Was there often conflict between the teachers and staff at SA?
3. Did you feel the ISD provided a quality education?
4. Were you able to learn/use teachings from ISD in your other work?
5. Do you think the ISD could have worked if more schools were within the district?
6. What did you feel was the biggest challenge for SA?
7. What, if anything, would you have done differently?
8. Were you encouraged to add innovative strategies to the school / how much flexibility did you have?
9. How well did support of ISD align with the needs of the school?
10. What were some community engagement strategies that were used?

## APPENDIX K

School-Level Administrator

Interview Protocol

1. How long have you been a principal at Southside Ashpole?
2. What have been the biggest challenges you have faced as SA's principal? How did ISD leadership, if at all, support you with these challenges?
3. During your time as principal, what, if any, challenges did SA face because of its status as an ISD school?
4. How closely do you work with people from the ISD to lead and improve SA?
5. Has there often been conflict between the staff and administrators as a result of ISD requirements or leadership?
6. Did you feel the ISD helped SA provide students with a quality education?
7. Has the ISD provided additional training or specific supports that have helped you or your staff make "innovative" changes?
8. Do you think the impact of the ISD would have been different if there were more schools within the district?
9. What, if anything, do you think the ISD could have done differently to support SA? Were you encouraged to add innovative strategies to the school?
10. How much flexibility did you have because of the school's ISD status
11. ·How well did the ISD align with the needs of the school?
12. Did the ISD provide any specific supports or strategies to further community engagement efforts at SA?
13. Were there unique opportunities available to you because of SA's status as an ISD school? [RS1]
14. During your time at SA, what changes or results are you most proud of? How did ISD play a role in these changes/accomplishments?

## APPENDIX L

Southside-Ashpole Teacher
Interview Protocol

1. How long have you taught at Southside-Ashpole?
2. What grade/s do you teach?
3. Did you have a supportive work environment while working at Southside-Ashpole?
4. Were you able to create a classroom environment that fit your needs while within the ISD?
5. Was there clear, consistent communication from staff and administrators at Southside-Ashpole?
6. Did you have control over your curriculum while serving at SA?
7. Did the professional development introduced help your needs?
8. Did you feel encouraged to be innovative in the classroom?
9. Did you feel supported by the Robeson community?
10. How do you think being part of the ISD impacted your experience at SA, as well as the experience of your students?
11. Are there any specific ISD policies or supports that have benefited you, your students or their families?
12. During your time at SA, what changes or results are you most proud of? How did ISD play a role in these changes/accomplishments?

## APPENDIX M

District-Level Administrator
Interview Summary

An interim superintendent for the ISD gave insight into the administration of Southside-Ashpole during their tenure. Starting at the beginning of the school year in August of 2021, alongside a new school-level administrator, this superintendent wanted to narrow the focus of the school's developmental hurdles. They noted one of the key issues was five out of the eight core teachers within Southside-Ashpole were brand new for the 21-22 school year. Before they could start working on systematic issues for the ISD and the Robeson community, the superintendent and other administrators invested their time in training the new teachers and building trust between the teachers and administrators.

This superintendent emphasized the constant change seemed to be the key factor in limiting Southside- Ashpole's progress within the ISD. The constant turnover of both administrative staff and

teachers did not make the school staff feel supported or cared for by the ISD system. When they initially greeted one teacher at the school at the beginning of their role, they remember the teacher saying “well, you’re number four,” highlighting the exhaustion felt by the constant leadership change within the ISD. The impact of the constant change on faculty, staff, and students started to wear down education quality at the school.

The superintendent also cited that since the school was the only one within the district, teachers felt isolated and targeted. The teachers felt they were unwanted by the public school system and were being punished for not meeting state standards. Knowing this program was only temporary and wanting to create a network for teachers to rely on, the superintendent and other administrators created networking opportunities between Southside- Ashpole teachers and staff with faculty in surrounding public schools in Robeson County.

Another challenge was mistrust in the local community. Many parents and community members, according to this superintendent, were distrustful of the ISD after the constant change. This team of administrators worked to put on open houses and were present for any community school events, talking with parents and caregivers to get a sense of how they felt about their child’s education, and tried to build a functional relationship there as well as with the child’s teachers.

With all this in mind, this superintendent endeavored to remain present at the school, working there with teachers and greeting students as they went to class. By strengthening teacher-administrator relationships, and focusing on creating a place of quality education,

The superintendent tried to work within the ISD to create a better place of learning for the students. The superintendent did cite some beneficial parts of working within the ISD. They believed the design worked well for the school, especially when it came to resources. If the school needed something, from new technology to curriculum support, the requests were processed quickly through NCDPI and funds were always available to Southside-Ashpole for whatever improvements they needed. The superintendent believes this helped with limiting problems for administration to tackle, allowing administrators to focus on the needs of the teachers and creating an environment of quality education for the students.

## APPENDIX N

School-Level Administrator

Interview Summary

A Southside-Ashpole Principal spoke about some of the benefits and challenges of serving within the ISD. With over twenty-five years of experience as a public-school principal, they used their expertise to train some of the new teachers and integrate more professional development into the school, as well as new curriculum and fostering parent-teacher engagement.

The principal cited the flexibility granted through the ISD as one of the main benefits for Southside-Ashpole. They could make innovations and changes as they saw necessary, adjusting as the principal, the teachers, and administrators learned what worked for the school and what did not. The funding available was also beneficial for fostering teacher training and curriculum programs.

The constant changes in the system detracted from the original goals of the ISD. When this principal got to the school, they noted fatigue and distrust from staff, teachers, and parents with all the constant change. This principal set out to improve this by creating a Community Facilitator position, and creating events to get parents into the school. This included a washer and dryer for parent use as well as a food pantry.

## APPENDIX O

Southside-Ashpole Teachers

Interview Summary

Teachers at Southside-Ashpole dealt with most of the frontline impacts from administration changes during the ISD. Two teachers who worked at Southside-Ashpole throughout the entire duration of the ISD cited the constant change, divisiveness in leadership, and natural disasters negatively impacting the ISD.

At the beginning of the ISD, the teachers felt like the goals were aligned with what Southside-Ashpole needed. They had professional development opportunities and learned new curriculum to help their students. However, there was no further professional development after the first year until the current school year. This lapse in development meant new teachers needed to be trained on the curriculum, and curriculum began differing between teachers and grades.

Constant change of teachers and administrators created a stressful environment, exacerbated by conflict between principals and ISD state administration after the first year. The teachers said this conflict often looped teachers in via email and was a key reason for teacher turnover. The community also took sides in this conflict, and students began leaving the school. This turnover and student change only increased with natural disasters and the COVID-19 pandemic.

Key changes they think could have helped the ISD was putting people with elementary school experience in charge of the system and the school. Additionally, with the extended time teachers were expected to be at Southside- Ashpole each day, making sure that time is paid would be crucial for teacher retention. Finally, ensuring students have access to reliable internet would foster learning outside the classroom or in a remote setting if need be.

The ISD helped teachers after the arrival of the current principal. Increased teacher training and using resources to train all teachers on the same curriculum helped close the achievement gap and improve test scores. Using some of the strategies from the NC Star plan, which each teacher worked on and helped facilitate ISD goals, they were able to increase Positive Behavior Interventions and create a STEM lab. Each teacher interviewed believes these strategies helped foster a quality learning environment where students were excited.

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# ISD EVALUATION NC TEACHER WORKING CONDITIONS ADDENDUM

Teacher Working Conditions Survey

The North Carolina Teacher Working Conditions Survey (*TWCS*) is an anonymous statewide survey of school-based educators. The survey is designed to assess teaching conditions within North Carolina at the school, district, and state level (Academic Development Institute, 2023). Data from the Teacher Working Conditions Survey was used in this addendum to capture the perspective of teachers impacted by the Innovative School District (ISD). This addendum provides a complimentary analysis of the *ISD* evaluation completed by the Sanford Policy Team (Spring 2023).

Response data from the Teacher Working Condition Survey indicated that Southside-Ashpole improved within most, but not all, the priorities associated with the Innovative School District. Over the course of the implementation of the *ISD*, teachers at Southside-Ashpole grew much more confident in the school's use of family engagement strategies, data to improve student learning, and professional development to support students with diverse learning needs.

## METHODOLOGY

As an addendum to the initial Innovative School District evaluation, the North Carolina Department of Public Instruction utilized the North Carolina Teacher Working Conditions Survey to analyze the impact of the *ISD* on Southside-Ashpole staff members. To contextualize the changes in *TWCS* response data from pre- and post-ISD implementation, the state compared Southside-Ashpole's response data to four comparison groups that were originally designed by the Friday Institute for an initial evaluation of the district (Stallings, et. al, 2020).[1]

This analysis utilizes the "agreement rate" or the percentage of teachers who agree/strongly agree with the statement. Blank responses were not summarized as a part of the total, but "Don't know" responses were included. At the bottom of each table, the "change in agreement rate" from 2018 through 2022 is presented. The *ISD* began during the 2018/2019 school year (*SY*) and the 2016 and 2018 surveys represent pre-ISD data while the 2020 and 2022 survey represent data from year two and year four, respectively. Survey results from schools with less than a 40% response rate were not included in the survey comparison. It is important to note that the student demographics and teaching staff both changed dramatically after Southside-Ashpole joined the Innovative School District, which impacted the results and validity of this analysis.

Statements for this *TWCS* analysis were chosen to assess the extent to which the *ISD* accomplished its established vision of improving chronically failing schools "through the creation of strong community partnerships, strategic coalitions, and the innovative implementation of data-informed practices" (Stallings, et. al, 2020). This analysis adds another layer of evidence to the staff interviews already completed by the Sanford Policy Team by utilizing data from a larger sample of teachers, analyzing data across multiple years of the *ISD*'s existence, and comparing the results to other schools from 2016-2022.

Statements one through three in the analysis were chosen to examine the impact of the *ISD* on successful community engagement & partnerships, while statements four through nine looks at the district's impact on the use of data, school leadership, and the ability to improve teaching practices through high-quality instructional materials and professional development.

## FINDINGS

### SECTION 1: COMMUNITY ENGAGEMENT & PARTNERSHIPS

The Innovative School District did not offer specific community engagement strategies to Southside-Ashpole school leaders (Guriyire et.al, 2023).[2] Trends from the 2018 *SY* (before the *ISD* began) through the 2022 *SY* suggest that the *ISD* did impact how the school interacted with the community. Southside-Ashpole's "agreement rate" from 2018-2022 increased across all three community engagement statements included in this evaluation. In 2022, Southside-Ashpole had the highest "agreement rates" for two out of the three community engagement statements evaluated.

From 2018 to 2022, 39% more teachers at Southside-Ashpole "agreed/strongly agreed" with Statement 1: "Parents/guardians are influential decision-makers in this school" (see Table 1). While the magnitude of this improvement was impacted by a 38% drop in the "agreement rate" between 2016 and 2018, Southside-Ashpole's 2022 "agreement rate" was higher than any comparison group in 2022 and indicates that there were intentional strategies put in place to involve family members after Southside-Ashpole entered the *ISD* implementation.

**Table 1**

*Statement 1: Parents/guardians are influential decision-makers in this school.*

| | **ISD (1)** | **Comparison Groups (4)** | | | |
|---|---|---|---|---|---|
| Year | Southside-Ashpole (1) | Matched Schools (2) | ISD Finalists (3) | ISD Selection List (27) | Robeson County Schools (18) |

| | | | | | |
|---|---|---|---|---|---|
| 2016 | 70% | 23% | 57% | 42% | 73% |
| 2018 | 32% | 24% | 51% | 36% | 69% |
| 2020 | 56% | 24% | 53% | 39% | 62% |
| 2022 | 71% | 20% | 60% | 44% | 60% |
| Change since 2018 | 39% | -4% | 10% | 8% | -9% |

Note. This table shows the percentage of teachers who agree/strongly agree with the statement. The bottom row captures the change in agreement percentage from 2018 to 2022. Due to rounding, it is possible that the "Change since 2016" percentage appears to be off by one percent.

For Statement 2: "This school does a good job of encouraging parent/guardian involvement," the "agreement rate" at Southside-Ashpole went from 84% to 94% between 2018 and 2020 but decreased to 88% in 2022. Comparatively, the 4% overall increase was smaller than all but one comparison group and the 88% agreement at Southside-Ashpole was the third highest (see Table 2). Statement 2 does not provide any evidence that the *ISD* had a significant impact on Southside-Ashpole's communication strategies with the school's community.

**Table 2**

*Statement 2: The school maintains clear, two-way communication with the community*

| | **ISD (1)** | **Comparison Groups (4)** | | | |
|---|---|---|---|---|---|
| Year | Southside-Ashpole (1) | Matched Schools (2) | ISD Finalists (3) | ISD Selection List (27) | Robeson County Schools (18) |
| 2016 | 83% | 59% | 82% | 77% | 88% |
| 2018 | 84% | 68% | 76% | 75% | 90% |
| 2020 | 94% | 73% | 87% | 79% | 92% |
| 2022 | 88% | 74% | 90% | 83% | 90% |
| Change since 2018 | 4% | 6% | 14% | 8% | 0% |

Note. This table shows the percentage of teachers who agree/strongly agree with the statement. The bottom row captures the change in agreement percentage from 2018 to 2022. Due to rounding, it is possible that the "Change since 2016" percentage appears to be off by one percent.

The analysis of Statement 3: "Parents/guardians are influential decision makers in this school," indicates that the ISD helped increase family involvement at Southside-Ashpole.

**Table 3**

*Statement 3: This school does a good job of encouraging parent/guardian involvement.*

| | **ISD (1)** | **Comparison Groups (4)** |
|---|---|---|

| Year | Southside-Ashpole (1) | Matched Schools (2) | ISD Finalists (3) | ISD Selection List (27) | Robeson County Schools (18) |
|---|---|---|---|---|---|
| 2016 | 91% | 67% | 85% | 84% | 89% |
| 2018 | 89% | 72% | 79% | 79% | 91% |
| 2020 | 100% | 70% | 90% | 81% | 90% |
| 2022 | 100% | 69% | 89% | 77% | 86% |
| Change since 2018 | 11% | -3% | 10% | -2% | -5% |

Note. This table shows the percentage of teachers who agree/strongly agree with the statement. The bottom row captures the change in agreement percentage from 2018 to 2022. Due to rounding, it is possible that the "Change since 2016" percentage appears to be off by one percent.

From 2018-2022, the "agreement rate" at Southside-Ashpole for Statement 3 increased by 11% and finished at 100%. Both the increase and overall "agreement rate" was larger than the comparison group from 2018-2022.

While there is no indication from the survey data that the school did a better job of engaging with the broader community around Southside-Ashpole, teachers clearly felt that families played a more significant role after the school changed districts. This finding is supported by staff interviews conducted by the Sanford Policy Team, which made no mention of community partnerships, but did find evidence of stronger parent engagement (Guriyire et.al, 2023).

**SECTION 2: DATA & CULTURE**

The Innovative School District was designed to bring innovative, data-driven improvements to Southside-Ashpole (Stallings et. al, 2020). According to the Teacher Working Conditions Survey, almost every teacher at Southside-Ashpole felt the school could deliver on this vision. For Statement 4, 100% of teachers at Southside-Ashpole in 2020 and 94% of teachers in 2022 "agreed/strongly agreed" that "the school leadership facilitates using data to improve student learning" (see Table 4).

**Table 4**

*Statement 4: The school leadership facilitates using data to improve student learning.*

| | **ISD (1)** | **Comparison Groups (4)** | | | |
|---|---|---|---|---|---|
| Year | Southside-Ashpole (1) | Matched Schools (2) | ISD Finalists (3) | ISD Selection List (27) | Robeson County Schools (18) |
| 2016 | 91% | 93% | 93% | 91% | 95% |
| 2018 | 84% | 94% | 90% | 91% | 95% |
| 2020 | 100% | 82% | 93% | 92% | 94% |
| 2022 | 94% | 91% | 92% | 92% | 95% |

| | | | | | |
|---|---|---|---|---|---|
| Change since 2018 | 10% | -3% | 1% | 1% | 0% |

Note. This table shows the percentage of teachers who agree/strongly agree with the statement. The bottom row captures the change in agreement percentage from 2018 to 2022. Due to rounding, it is possible that the "Change since 2016" percentage appears to be off by one percent.

Southside-Ashpole's agreement rate dropped by 6% from 2020-2022, but the overall increase of 10% from 2018-2022 was larger than any comparison group. Additionally, the school's 94% "agreement rate" in 2022 was better than every comparison group other than Robeson County Schools (95%), which experienced no growth from 2018-2022. These results suggest that Southside-Ashpole's leadership team was able to facilitate the use of new, data-driven strategies to increase student growth while under the *ISD's* jurisdiction. However, it should be noted that there are no indications from the work completed by the Sanford Policy Team that specific, innovative strategies were put into place to improve data usage (Guriyire et.al, 2023).

**Table 5**

*Statement 5: In this school we take steps to solve problems.*

| | **ISD (1)** | **Comparison Groups (4)** | | | |
|---|---|---|---|---|---|
| Year | Southside-Ashpole (1) | Matched Schools (2) | ISD Finalists (3) | ISD Selection List (27) | Robeson County Schools (18) |
| 2016 | 70% | 59% | 69% | 73% | 84% |
| 2018 | 89% | 81% | 71% | 69% | 88% |
| 2020 | 89% | 54% | 87% | 72% | 85% |
| 2022 | 88% | 67% | 88% | 77% | 81% |
| Change since 2018 | -1% | -13% | 17% | 8% | -7% |

Note. This table shows the percentage of teachers who agree/strongly agree with the statement. The bottom row captures the change in agreement percentage from 2018 to 2022. Due to rounding, it is possible that the "Change since 2016" percentage appears to be off by one percent.

Another key strategy for improving chronically failing schools is improving staff culture (Hinde, 2005). According to the TWCS, the staff's perception of their own culture may not have improved from 2018-2022. The "agreement rate" for Statement 5: "In this school we take steps to solve problems" decreased by 1% from 2018-2022 (see Table 5). This aligns with key findings from the Sanford Policy Team. According to the Sanford Policy Team's report, the high levels of turnover that occurred at the school and district level within the *ISD* had a negative impact on staff culture and prevented the school from focusing on some of its most prominent issues (Guriyire et.al, 2023).

## SECTION 3: PROFESSIONAL DEVELOPMENT OPPORTUNITIES

A key mechanism for developing innovative strategies and improved school outcomes is high-quality professional development.[3] According to *TWCS* data, teachers at Southside-Ashpole felt that the overall professional development resources available to them only improved slightly. According to Statement 6: "Sufficient resources are available for professional development in my school," the "agreement rate" rose by 4% from 2018-2022, which was similar to three of the four comparison groups during the same period (see Table 6).

**Table 6**

*Statement 6: Sufficient resources are available for professional development in my school.*

| | **ISD (1)** | **Comparison Groups (4)** | | | |
|---|---|---|---|---|---|
| Year | Southside-Ashpole (1) | Matched Schools (2) | ISD Finalists (3) | ISD Selection List (27) | Robeson County Schools (18) |
| 2016 | 74% | 72% | 74% | 76% | 84% |
| 2018 | 84% | 77% | 74% | 73% | 83% |
| 2020 | 89% | 55% | 78% | 70% | 77% |
| 2022 | 88% | 73% | 78% | 78% | 87% |
| Change since 2018 | 4% | -4% | 5% | 4% | 4% |

Note. This table shows the percentage of teachers who agree/strongly agree with the statement. The bottom row captures the change in agreement percentage from 2018 to 2022. Due to rounding, it is possible that the "Change since 2016" percentage appears to be off by one percent.

Interestingly, the "agreement rate" for Statement 7: "Professional development enhances teachers' ability to implement instructional strategies that meet diverse student learning needs," increased dramatically at Southside-Ashpole from 2018-2022 (see Table 7). By 2022, 100% of teachers "agreed/strongly agreed" with Statement 7, which was 16% higher than the 2018 agreement rate.

**Table 7**

*Statement 7: Professional development enhances teachers' ability to implement instructional strategies that meet diverse student learning needs*.

| | **ISD (1)** | **Comparison Groups (4)** | | | |
|---|---|---|---|---|---|
| Year | Southside-Ashpole (1) | Matched Schools (2) | ISD Finalists (3) | ISD Selection List (27) | Robeson County Schools (18) |
| 2016 | 87% | 65% | 84% | 80% | 88% |
| 2018 | 84% | 77% | 79% | 76% | 89% |
| 2020 | 75% | 86% | 74% | 80% | 81% |

| | | | | | |
|---|---|---|---|---|---|
| 2022 | 100% | 73% | 87% | 79% | 85% |
| Change since 2018 | 16% | -4% | 9% | 3% | -4% |

Note. This table shows the percentage of teachers who agree/strongly agree with the statement. The bottom row captures the change in agreement percentage from 2018 to 2022. Due to rounding, it is possible that the "Change since 2016" percentage appears to be off by one percent

While it seems that teachers did not perceive large improvements in the overall professional development resources offered to them at Southside-Ashpole, the school appears to have made a concerted effort to address diverse learning needs while under the *ISD*.

**Table 8**

*Statement 8: Teachers receive feedback that can help them improve teaching*.

| | **ISD (1)** | **Comparison Groups (4)** | | | |
|---|---|---|---|---|---|
| Year | Southside-Ashpole (1) | Matched Schools (2) | ISD Finalists (3) | ISD Selection List (27) | Robeson County Schools (18) |
| 2016 | 83% | 62% | 70% | 81% | 88% |
| 2018 | 84% | 75% | 80% | 77% | 89% |
| 2020 | 100% | 76% | 89% | 80% | 89% |
| 2022 | 100% | 77% | 89% | 83% | 87% |
| Change since 2018 | 16% | 2% | 8% | 6% | -2% |

Note. This table shows the percentage of teachers who agree/strongly agree with the statement. The bottom row captures the change in agreement percentage from 2018 to 2022. Due to rounding, it is possible that the "Change since 2016" percentage appears to be off by one percent.

Data from the Teacher Working Conditions Survey also suggests that resources and feedback for teachers improved while Southside-Ashpole was part of the *ISD*. From 2018-2022, the "agreement rate" at Southside-Ashpole for Statement 8: "Teachers have sufficient access to appropriate instructional materials," increased by 20% (74% to 94%) and was higher than any of the comparison groups in 2022 (see Table 8).

Similarly, the "agreement rate" at Southside-Ashpole increased from 84% (2018) to 100% (2022) for Statement 9: "Teachers receive feedback that can help them improve teaching" (see Table 9).

**Table 9**

*Statement 9: Teachers have sufficient access to appropriate instructional materials*.

| | **ISD (1)** | **Comparison Groups (4)** | | | |
|---|---|---|---|---|---|
| Year | Southside-Ashpole (1) | Matched Schools (2) | ISD Finalists (3) | ISD Selection List (27) | Robeson County Schools (18) |

| | | | | | |
|---|---|---|---|---|---|
| 2016 | 78% | 58% | 73% | 70% | 86% |
| 2018 | 74% | 65% | 64% | 69% | 84% |
| 2020 | 94% | 44% | 85% | 70% | 78% |
| 2022 | 94% | 73% | 88% | 77% | 82% |
| Change since 2018 | 20% | 9% | 24% | 9% | -1% |

Note. This table shows the percentage of teachers who agree/strongly agree with the statement. The bottom row captures the change in agreement percentage from 2018 to 2022. Due to rounding, it is possible that the "Change since 2016" percentage appears to be off by one percent.

The increase in "agreement/strong agreement" for Statements 7, 8, and 9 by teachers at Southside-Ashpole from 2020-2022 mirrors findings from the Sanford Policy Team's report. The report identified increases in professional development spending and an increase in the budget for school resources. These were specific benefits of the *ISD* implementation (Guriyire et.al, 2023), which is reflected within the TWCS analysis by the fact that Southside-Ashpole had the highest agreement rate across all three statements.

## CONCLUSION AND RECOMMENDATIONS

Overall, the Teacher Working Conditions Survey data analyzed for this evaluation suggests that Southside-Ashpole potentially benefited from the *ISD's* support. In 2018, before Southside-Ashpole entered the *ISD*, the school had an "agreement rate" higher than all four of the comparison groups for two of the nine statements analyzed within this addendum. By 2022, Southside-Ashpole had a "higher agreement rate" than all four comparison groups for seven out of the nine statements and was within 2% of the "highest rate" for the other two statements. Additionally, Southside-Ashpole's "agreement rate" increased more than all four comparison groups for six of the nine statements from 2018-2022.

While no causal claims can be established by the research completed in this addendum, there is a significant amount of descriptive data that suggests that Southside-Ashpole was able to achieve specific aspects of the *ISD's* vision according to the teachers who worked there. This *TWCS* analysis supports findings from the Sanford Policy Team's evaluation that the additional financial support and flexibility, when paired with a stable leadership team, allowed Southside-Ashpole to improve teacher conditions by investing in better family engagement strategies, curricula, and professional development opportunities (Guriyire et.al, 2023).[4]

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# APPENDIX A

The percentage of teachers who "agree/strongly agree" with the statement.

**Table 1**

*Statement 1: Parents/guardians are influential decision-makers in this school.*

| | **ISD (1)** | **Comparison Groups (4)** | | | |
|---|---|---|---|---|---|
| Year | Southside-Ashpole (1) | Matched Schools (2) | ISD Finalists (3) | ISD Selection List (27) | Robeson County Schools (18) |
| 2016 | 70% | 23% | 57% | 42% | 73% |
| 2018 | 32% | 24% | 51% | 36% | 69% |
| 2020 | 56% | 24% | 53% | 39% | 62% |
| 2022 | 71% | 20% | 60% | 44% | 60% |
| Change since 2018 | 39% | -4% | 10% | 8% | -9% |

**Table 2**

*Statement 2: The school maintains clear, two-way communication with the community*

| | **ISD (1)** | **Comparison Groups (4)** | | | |
|---|---|---|---|---|---|
| Year | Southside-Ashpole (1) | Matched Schools (2) | ISD Finalists (3) | ISD Selection List (27) | Robeson County Schools (18) |
| 2016 | 83% | 59% | 82% | 77% | 88% |
| 2018 | 84% | 68% | 76% | 75% | 90% |
| 2020 | 94% | 73% | 87% | 79% | 92% |
| 2022 | 88% | 74% | 90% | 83% | 90% |
| Change since 2018 | 4% | 6% | 14% | 8% | 0% |

**Table 3**

*Statement 3: This school does a good job of encouraging parent/guardian involvement.*

| | **ISD (1)** | **Comparison Groups (4)** | | | |
|---|---|---|---|---|---|
| Year | Southside-Ashpole (1) | Matched Schools (2) | ISD Finalists (3) | ISD Selection List (27) | Robeson County Schools (18) |
| 2016 | 91% | 67% | 85% | 84% | 89% |
| 2018 | 89% | 72% | 79% | 79% | 91% |
| 2020 | 100% | 70% | 90% | 81% | 90% |

| | | | | | |
|---|---|---|---|---|---|
| 2022 | 100% | 69% | 89% | 77% | 86% |
| Change since 2018 | 11% | -3% | 10% | -2% | -5% |

**Table 4**

*Statement 4: The school leadership facilitates using data to improve student learning.*

| | ISD (1) | Comparison Groups (4) | | | |
|---|---|---|---|---|---|
| Year | Southside-Ashpole (1) | Matched Schools (2) | ISD Finalists (3) | ISD Selection List (27) | Robeson County Schools (18) |
| 2016 | 91% | 93% | 93% | 91% | 95% |
| 2018 | 84% | 94% | 90% | 91% | 95% |
| 2020 | 100% | 82% | 93% | 92% | 94% |
| 2022 | 94% | 91% | 92% | 92% | 95% |
| Change since 2018 | 10% | -3% | 1% | 1% | 0% |

**Table 5**

*Statement 5: In this school we take steps to solve problems.*

| | ISD (1) | Comparison Groups (4) | | | |
|---|---|---|---|---|---|
| Year | Southside-Ashpole (1) | Matched Schools (2) | ISD Finalists (3) | ISD Selection List (27) | Robeson County Schools (18) |
| 2016 | 70% | 59% | 69% | 73% | 84% |
| 2018 | 89% | 81% | 71% | 69% | 88% |
| 2020 | 89% | 54% | 87% | 72% | 85% |
| 2022 | 88% | 67% | 88% | 77% | 81% |
| Change since 2018 | -1% | -13% | 17% | 8% | -7% |

**Table 6**

*Statement 6: Sufficient resources are available for professional development in my school.*

| | ISD (1) | Comparison Groups (4) | | | |
|---|---|---|---|---|---|
| Year | Southside-Ashpole (1) | Matched Schools (2) | ISD Finalists (3) | ISD Selection List (27) | Robeson County Schools (18) |
| 2016 | 83% | 62% | 70% | 81% | 88% |
| 2018 | 84% | 75% | 80% | 77% | 89% |
| 2020 | 100% | 76% | 89% | 80% | 89% |
| 2022 | 100% | 77% | 89% | 83% | 87% |
| Change since 2018 | 16% | 2% | 8% | 6% | -2% |

**Table 7**

*Statement 7: Professional development enhances teachers' ability to implement instructional strategies that meet diverse student learning needs*.

| | ISD (1) | Comparison Groups (4) | | | |
|---|---|---|---|---|---|
| Year | Southside-Ashpole (1) | Matched Schools (2) | ISD Finalists (3) | ISD Selection List (27) | Robeson County Schools (18) |
| 2016 | 87% | 65% | 84% | 80% | 88% |
| 2018 | 84% | 77% | 79% | 76% | 89% |
| 2020 | 75% | 86% | 74% | 80% | 81% |
| 2022 | 100% | 73% | 87% | 79% | 85% |
| Change since 2018 | 16% | -4% | 9% | 3% | -4% |

**Table 8**

*Statement 8: Teachers receive feedback that can help them improve teaching.*

| | ISD (1) | Comparison Groups (4) | | | |
|---|---|---|---|---|---|
| Year | Southside-Ashpole (1) | Matched Schools (2) | ISD Finalists (3) | ISD Selection List (27) | Robeson County Schools (18) |
| 2016 | 83% | 62% | 70% | 81% | 88% |
| 2018 | 84% | 75% | 80% | 77% | 89% |
| 2020 | 100% | 76% | 89% | 80% | 89% |
| 2022 | 100% | 77% | 89% | 83% | 87% |
| Change since 2018 | 16% | 2% | 8% | 6% | -2% |

**Table 9**

*Statement 9: Teachers have sufficient access to appropriate instructional materials*.

| | ISD (1) | Comparison Groups (4) | | | |
|---|---|---|---|---|---|
| Year | Southside-Ashpole (1) | Matched Schools (2) | ISD Finalists (3) | ISD Selection List (27) | Robeson County Schools (18) |
| 2016 | 78% | 58% | 73% | 70% | 86% |
| 2018 | 74% | 65% | 64% | 69% | 84% |
| 2020 | 94% | 44% | 85% | 70% | 78% |
| 2022 | 94% | 73% | 88% | 77% | 82% |
| Change since 2018 | 20% | 9% | 24% | 9% | -1% |

# ISD EVALUATION PHASE II: QUALITATIVE ADDENDUM

The purpose of this phase of data collection for the Innovative School District was to analyze the experiences and perspectives of parents and or guardians at Southside Ashpole Elementary School. The qualitative inquiry and approach allows for the exploration of the context of these experiences of parents and or guardians within the scope of the implementation of *ISD*. These varied perspectives and meanings that these participants held were the main unit of analysis for the initial research question posited by the Sanford Policy Team report (Guriyire et.al, 2023). Therefore, it was important to address this stated limitation in the initial findings of this evaluation. The next section discusses the research questions that were addressed in this addendum utilizing this unit of analysis.

## RESEARCH QUESTIONS

The research questions addressed in this phase of the study were:

- What are the outcomes for students and families who attended the innovative school districts?[1]
- What are the perceptions of community stakeholders of the innovative school districts?
- What are their experiences (families and community members) of its implementation?

## METHODS

A *thematic analysis* (Braun and Clark, 2012) was used to analyze semi-structured interviews in the second data collection phase of this evaluation. Thematic analysis was used to answer these additional questions, supporting the rationale for utilizing this methodological approach. Parents/ guardians were purposefully sampled of students who have attended or currently attending Southside-Ashpole Elementary School.

### PARTICIPANTS

The initial study targeted teachers, district administrators, and school leadership from Southside Ashpole (*ISD*). The phase of data collection included three parents from the Southside Ashpole school community. Relationships between the North Carolina Department of Public Instruction (Deputy Superintendent; Derrick Jordan), ISD Superintendent Dr. Ron Hargrave, and Southside-Ashpole Principal were leveraged to gain access and further insight into the family and community aspects and overall aspects tied to the implementation of *ISD*.

## DATA COLLECTION AND ANALYSIS

Qualitative data was collected to understand *ISD* students' and families' attitudes/perspectives at Southside-Ashpole. The initial team conducted a series of interviews with an ISD administrator, as well as a principal and two teachers at Southside-Ashpole. For information about the specific questions asked in the interviews, (see Appendix 4) of the original report. Additional protocols for families (parents and or guardians) and community members were developed for the second phase of the study (see Appendix B). Research questions from the initial *ISD* evaluation conducted by the Friday Institute (Stallings et.al, 2020) and the Duke Sanford Public Policy report (Guriyire et.al, 2023) were reviewed and aligned with the research questions and interview protocols for this added report.

The school administration and ISD superintendent were provided multiple options to conduct these interviews (on site, phone, or video conference). The second phase of parent/ guardian interviews occurred in June 2023 and was conducted by phone. Informed consent (see Appendix C) was provided to participants before recording their responses. Participants were also notified that consent forms could be mailed/ or emailed to them upon request. An additional protocol (see Appendix B) was developed to further understand the perspectives of families and community members on the *ISD* and Southside-Ashpole Implementation. Interviews lasted 20 to 25 minutes and were transcribed for analysis (Oter. Ai). Internal checks were conducted by members of the research team in order to ensure responses were verbatim and were rich in description.

A thematic analysis was utilized for this phase of data collection (Braun & Clarke, 2012). Table 1 shows the six steps indicative for this type of analysis. A deductive /structured coding scheme (see Appendix A) was identified (Mies et.al, 2013; Saldaña, 2016). The coding scheme was informed by the initial research questions and protocols were developed to denote the patterns associated with family and community members' perspectives on and experiences with Southside-Ashpole's implementation of the Innovative School District. The original evaluation (Stallings et.al, 2020) and the Duke Sanford Public Policy report (Guriyire et.al, 2023) were also deferred to, in order to support definitions in the coding matrix. Pattern coding (meta-coding) was used during the 2nd phase of analysis. This involved organizing the corpus into "sets, themes, or constructs and attributes meaning to the organization" (Saldana, 2016, p. 266). The theme development encompassed noting the interrelationship between codes as well as producing unique insights of themes by conceptually addressing the larger questions posed in this study through a thematic map.

Collaborative mechanisms were implemented to support agreement amongst the coders in this study. Enabling conditions and barriers were also discussed as a part of the context within the development of the coding scheme regarding how the Innovative School District's implementation

contributed to the school, community, and family engagement. An inductive approach was also used within the second phase of coding to capture additional themes within the data (Saldaña, 2016). Triangulation of these data points were used to validate findings. Memoing, field notes, and debriefing were used amongst the coders to maintain internal validity. The codebook for this phase of analysis can be found in Appendix B of this report.

**Table 1**

*Phases of thematic analysis*

| Phase | Description of the process |
|---|---|
| 1. Familiarising yourself with your data: | Transcribing data (if necessary), reading and re-reading the data, noting down initial ideas. |
| 2. Generating initial codes: | Coding interesting features of the data in a systematic fashion across the entire data set, collating data relevant to each code. |
| 3. Searching for themes: | Collating codes into potential themes, gathering all data relevant to each potential theme. |
| 4. Reviewing themes: | Checking in the themes work in relation to the coded extracts (Level 1) and the entire data set (Level 2), generating a thematic 'map' of the analysis. |
| 5. Defining and naming themes: | Ongoing analysis to refine the specifics of each theme, and the overall story the analysis tells; generating clear definitions and names for each theme. |
| 6. Producing the report: | The final opportunity for analysis. Selection of vivid, compelling extract examples, final analysis of selected extracts, relating back of the analysis to the research question and literature, producing a scholarly report of the analysis. |

## FINDINGS

There were two interviews conducted with Southside-Ashpole parents in the second phase of this evaluation. One participant did not show up to their scheduled interview. From the coded data set, there were thirty one quotations extracted from semi-structured interviews. The two participants in this addendum were identified as *Parent 1* and *Parent 2*. There were eight categories that emerged from 26 sub-codes. These codes were organized in 3 code-groups: parents, students, and student outcomes. The code groups were used to organize the coded quotations by each participant.

*Co-occurrences* were used to analyze the relationships between sub codes. The frequencies in Table 2 indicate how subcodes overlapped within the data. Note that due to the size of the data set for this qualitative analysis phase, the frequencies were not saturated.

**Table 2**

*ISD Parent Interview Code Co-occurrence Table*

| Category/Code (frequency) | | Parent/Family Needs (15) | | | | Student Needs (7) | |
|---|---|---|---|---|---|---|---|
| | | Transition Consideration (2) | School Staff Quality (5) | Available Resources (1) | Barriers/Challenges (3) | Academic (5) | Social Emotional Learning (2) |
| **Student Experiences (17)** | Academic Growth (3) | 0 | 1 | 1 | 0 | 1 | 0 |
| | Teacher-Student Relationship (4) | 0 | 2 | 0 | 0 | 0 | 0 |
| | Class Environment (3) | 0 | 1 | 0 | 0 | 0 | 1 |
| | Teacher Quality (1) | 0 | 1 | 0 | 0 | 0 | 0 |
| **Translation of Student Outcomes (6)** | Barriers (4) | 1 | 0 | 0 | 1 | 0 | 0 |
| | Benefits (2) | 0 | 2 | 0 | 0 | 0 | 0 |

The Atlas. Ti Co-occurrence Explorer, was used to filter through frequency counts between sub-codes. Frequency counts that were higher have a stronger relationship between the sub codes: quality of school staff, teacher-student relationships, and the benefits tied to the translation of student outcomes. In the parent/family needs category, the school staff quality subcode showed more frequency counts within the co-occurrence explorer in relationship to the student experience and translation of student outcomes categories.

Table 3 shows the salient and non-salient categories by frequency in this thematic analysis. Student experience is a more prevalent category (*f*=17). Thereafter, the second most prevalent category was parent/family needs (*f*=15). Parent empowerment, parent engagement, and parent involvement, on the other hand, are the least salient categories with one frequency count each.

**Table 3**

*Salient and Non-Salient Categories in ISD Parent Interviews*

| | **Category/Code** | Frequency |
|---|---|---|
| **Most Salient** | Student Experiences | 17 |
| | Parent/Family Needs | 15 |

| | | |
|---|---|---|
| | Student Needs | 7 |
| | Translation of Student Outcomes | 6 |
| | Parent Communication | 5 |
| **Least Salient** | Parent Empowerment | 1 |
| | Parent Engagement | 1 |
| | Parent Involvement | 1 |

A word cloud was generated through ATLAS.ti to explore the frequencies of the interview responses. This visualization shows the size of the words in relationship to its frequency. The larger the word in the generated cloud, the larger its frequency. Figure 1 displays the largest words as frequencies within this data set. These are denoted as: school, need, kid, good and teacher.

**Figure 1**

*Parent Interview Word Cloud*

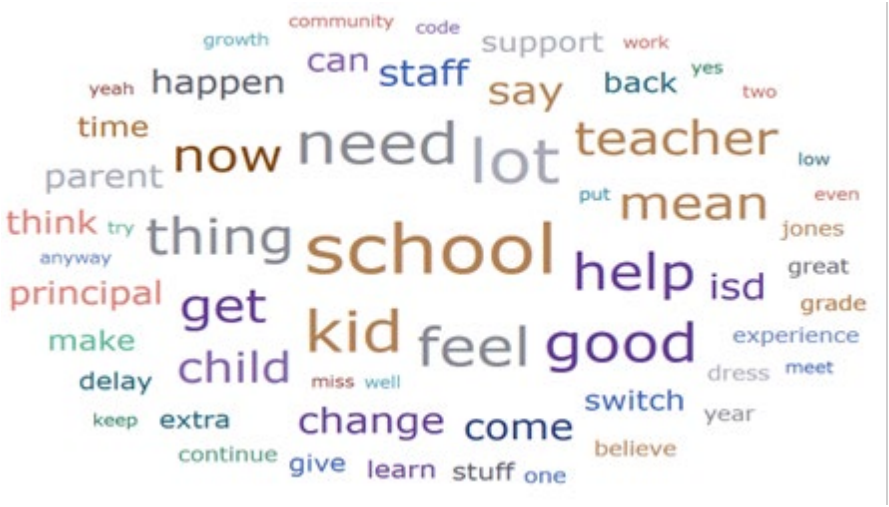


Table 4 shows the themes that emerged from this thematic analysis. The themes were developed following the systematic coding of each parent interview. The co-occurrences explored in this analysis revealed the overall frequency counts as it pertains to the categories within the data. In addition, the word cloud was also used to enhance the visual representation of the interviewees' responses. The themes are not saturated due to the size of the data set.

**Table 4**

*Themes for Phase Two of ISD Parent Interviews*

Theme 1. Barriers to student academic progress

Theme 2. Strong school leadership

Theme 3. Encouraging and committed teachers

Theme 4. Importance of stability in the school community

## REPORTING OF THEMES

### BARRIERS TO STUDENT ACADEMIC PROGRESS

This theme reflected the barriers, either currently existing or pre-existing, that were enhanced by *ISD* policies and or hinder a student's progress beyond a single academic year. Both interviewees reported that their children struggled to keep up with the curriculum at Southside-Ashpole. For instance, *Parent 1* discussed the disruptions tied to COVID paired with a lack of instructional support strategies that hindered academic outcomes and progress for their child. *COVID, along with the changes that happen with ISD really placed them at a disadvantage. They missed out on a lot of key strategies, a lot of them didn't learn, or they didn't get their [extra attention] (1:35 ¶ ).*

It is important to identify these barriers to academic progress and strategies that turn around schools can overcome these barriers. Introducing instructional strategies such as differentiation can support addressing the unique learning needs of students (Val Geel et.al., 2019). This also included identifying accessible curricular resources and enrichment opportunities that can help support students. Furthermore, both parents acknowledged that there were additional resources that were provided by Southside Ashpole that benefited their children. These included after-school programming and extracurricular clubs. However, both parents noted that more could have been done to address their child's academic challenges during the ISD transition. *Parent 2* also mentioned the academic challenges that some students in the setting faced. This parent emphasized that students may need more teachers to offer additional support in the classroom:

> *The academia. Some of the kids say it's harder for them. Some kids are slower than others, and they just need to offer a lot more I'd say. It takes a lot a lot more like teachers and parents to be and just two teachers, I believe there's not enough of them in one classroom setting. (2:12 ¶ )*

Teacher turnover also created challenges for Southside-Ashpole during the school's transition to *ISD*. The Sanford Policy report found that the constant change of teachers and administrators made it difficult for students and families to feel adequately supported (Guriyire et.al, 2023). *Parent 2*

emphasized the need for more educators in the classroom to support students when they face academic challenges.

### STRONG SCHOOL LEADERSHIP

This theme discussed the implications of strong leadership within the context of the school setting. The quality of school leadership can be a significant determining factor in a family's school experience as well as enhance student outcomes (Grissom et.al., 2021). Strong Strong school leadership has the ability to influence school culture, build trust, and can promote parental involvement in education. (Yulianti et.al., 2019). As shown in Table 2, the staff quality showed a higher frequency count (*f*=15) under the parent/family needs category. Staff quality also had the highest frequency in the co-occurrence explorer across any subcode in the analysis. Both parents discussed Southside-Ashpole School leadership when asked about what changes they were most proud of at the school. *Parent 2* noted that they had several positive experiences with the principal and school staff at Southside-Ashpole: *I don't know what it is, about the change and the school too but I believe it's a lot to do with the principal and the staff they have in the school system. (2:17 ¶ )*

It was clear that the school leadership was pivotal in changing the culture of the setting so that the environment was enhanced. Effective principals are not only able to have a positive impact on student outcomes, they also are able to support their teachers with their professional learning, so that they can impact their students' learning (Grissom et.al., 2021). *Parent 1* reiterated that the principal's leadership was showcased through her work to transform the school's environment: *Right now, I feel like they are under great leadership. She is she's a strong leader. They have the kids are actually happy now when you go into in that environment (1:36 ¶).*

Nevertheless, it was not evident in this data set as to how implementation/ or introduction of ISD helped support the principal's development into a strong leader at her school. This was further discussed in the Sanford Policy report and was a central finding of the teacher interviews(Guriyire, et.al, 2023). Similar to the statements made by parents, the report found that Southside-Ashpole was able to improve under the leadership of a principal with past experience. The principal was able to build trust with families and community members to create innovative change at the school.

### ENCOURAGING AND COMMITTED TEACHERS

This theme reflected how teachers in Southside Ashpole were viewed as encouraging and supportive of their students' academic and social emotional needs and their overall growth in these areas. Research shows that a teacher's role and influence in the classroom are essential to students' learning experiences (Grissom et.al., 2021). Strategies, instructional support, and encouragement

provided by educators in the classroom can lend themselves to student academic growth and overall development (Sparks, 2019). *Parent 1* discussed the commitment of the teachers and described how students' experiences were positively shaped by their ability to build relationships with teachers who remain a part of the school community:

> *The teachers have been, they've been strategic and they're, I guess what I guess the word I want to use is steady. So there hasn't been a big shift in staff for the school year so they're getting to know these teachers, there's not a lot of turnover. So they're making those relationships. (1:22 ¶ )*

Similarly, *Parent 2* also mentioned their appreciation for the teachers and staff several times in their interview:

> *They meet, they meet their like physical emotional needs and then they they're like, offering them help if they need it, extra help. They're encouraging them to do they're work you know, to help them out they need to do the work. (2:4 ¶ )*

Moreover, *Parent 2* expressed their gratitude about how their child's teacher worked with students in their classroom and how they encouraged them throughout their experience: *I really, I liked the teachers and the staff down there and I like the principal. I mean they're encouraging the children and really helping them out and participating with them and doing stuff with them. (2:3 ¶ )*

Essentially, the school's community was further enhanced through the efforts of teachers and staff and their focus on creating an engaging and supporting environment for students. These experiences also translate into the culture of the school and shape the learning environment for students.

**IMPORTANCE OF STABILITY**

During organizational change, it becomes increasingly essential for schools to identify and address the needs of students and their families. The *ISD* transition at Southside-Ashpole required that educators, students, and families adapt to new policies and expectations. Both parents spoke to how they dealt with these transitions and the impact it had on two way communication from the school and the school's community. This also shifted the expectations and need for parental involvement. For example, *Parent 1* highlighted the challenges they faced when ISD was implemented and discussed communication challenges that occurred which created a barrier to their involvement at the school: *All the things that we were sold during the time when the transition was occurring, never happened. There was no stability, there was no open communication. Nothing that we were promised happened. (1:10 ¶ ).* *Parent 1* also emphasized their beliefs regarding the priorities that could improve ISD implementation in

the future for their school and other communities: *There needs to be stability, there needs to be control, and there needs to be structure before putting this out on another community. (1:26 ¶ )*

This narrative reiterates the importance of stability in a time of transition and change within a schools' organizational structures. The Sanford Policy report also emphasizes the importance of transparency and collaboration in establishing a school community that can successfully navigate change (Guriyire et.al, 2023). In the end, the timing, resources, support, and communication of structural changes are important to a school's community.

The themes that emerged from this data set answer the research questions posed in this phase of the project. These research questions more specifically ask about outcomes for students and families who attended *ISD* and the experiences of parents during its implementation. Theme One *Barriers to Student's Academic Progress*, identified and explained the existing barriers that parents perceived had an impact on their child's academic outcomes and their overall growth. This created challenges for their children within this setting. Theme Two *Strong School Leadership* and Theme Three *Encouraging and Committed Teachers* highlighted how the quality of the school staff and strong leadership influenced parent's experiences and their child's experiences as they attended Southside-Ashpole. Theme Three also addressed the ways in which a teacher's support, and ability to develop relationships with their students can influence the experiences that students have in their setting and enhance their academic, and social emotional growth. In the end, this also reinforced a positive school culture at Southside-Ashpole. *Parent 2* spoke highly of the school staff, teachers, and principal and noted that their child benefitted from the encouragement and support of their teachers. Finally, Theme 4 *Importance of Stability* addressed some of the challenges experienced by Southside- Ashpole parents such as two way communication and parental involvement. This perceived lack of stability affected their experience with the setting around the *ISD* implementation. *Parent 1* specifically spoke to the promises they felt were not upheld by the school during its implementation. As a result, this has impacts for parents and their involvement and decision making as a stakeholder within the setting.

The Sanford Public Policy report (Guriyire et.al, 2023) initially examined how school strategies and state-led processes influenced the implementation of *ISD* at Southside-Ashpole. The themes discussed in the initial report related mostly to experiences informed by teacher perspective. A lack of support felt by teachers during the *ISD* transition resulted in turnover at the school. While it was noted that *ISD* processed school resource needs in a timely manner, teachers themselves were not prepared or provided with professional development skills needed to help all students succeed in the classroom. The instability felt by teachers early in the transition was eased under strong leadership of a principal who was able to provide structure where *ISD* did not. The second phase of this analysis builds on the initial

report but also introduces the experience of parents and families. This further supports the unit of analysis as stated in the initial Duke Public Policy evaluation. In addition, the research questions were aligned within the Duke Sanford Public Policy Report and the findings from this report were supported through the deductive and inductive coding framework situated through the Friday Institute Evaluation (Stallings et. al., 2020) and Duke Sanford Public Policy Report. (Guriyire, et.al, 2023)

## CONCLUSION AND RECOMMENDATIONS

Phase Two of the Southside-Ashpole *ISD* project focused on parent and family perspectives. The two parents that were interviewed for this evaluation shared insight and provided recommendations based on their unique experiences during the implementation of *ISD* at their child's school. Following the data analysis of the parent interviews, four themes emerged. These included: *Barriers to Academic Progress*, *Strong School Leadership*, *Encouraging and Committed Teachers*, and the *Importance of Stability*. The interview findings are not generalizable due to the limited sample size, but are transferable in that this adds to the perspective of these experiences and provides valuable insight to a significant group in the school community.

Based on the findings from parent and family interviews, it is recommended that future iterations of innovative school districts establish a comprehensive plan for parental engagement and introduce intentional strategies to collaborate with parents during the implementation process. Family engagement connects parents with opportunities to be active members of their school community and builds shared responsibility and mutual respect between some of the most influential actors in a child's academic development (Waterford.org, 2023).

The Sanford Policy Team recommended collaboration and transparency across local educational agencies and with teachers does not speak explicitly to the role of families. The team also emphasized existing barriers to implementation and recommended that flexibility and pathways for support be prioritized in the *ISD* transition process moving forward. Policy questions for 'turn around models' to consider are: should there be structures to these types of transitions for families and what additional supports are needed when there are significant organizational changes that occur in a school setting? These policy recommendations presented in this phase of the project focused on challenges identified by parents and aimed to address barriers to family engagement at Southside-Ashpole.

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# APPENDIX A

ISD Coding Scheme (Applied Codes)

| Category | Subcode | Definition/Description | f | Code Groups |
|---|---|---|---|---|
| **PARENT COMMUNICATION** | | **This category encompasses parent/family needs and how SA identifies, anticipates, and responds to the unique needs of parents and families in the setting through various forms of communication (either 1 or 2-way). This includes identifying specific school practices and identifying/ tweaking school policies that relate to forms of communication.** | **5** | |
| | • Prnt.Comm_barr_to. (Barriers to) | SA/ ISD policies, and practices, that are discussed in interviews which create a hindrance to communicating (explicitly, or implicitly) to parents and families and their support in helping their child within the setting. | 1 | Parents |
| | • Prnt.Comm_freq.comm. (Frequency) | This code relates to how often parents/families communicate (outreach to the school) or receive communication from SA ISD personnel | 1 | Parents |
| | • Prnt.Comm_itent. (Intentionality) | This code relates to how SA structures it's communication to parents/families so that it is timely, accessible,and helpful in light of meeting their needs and helping their child/ren | 1 | Parents |
| | • Prnt.Comm_Schl. Bsd. (School Based) | This code relates to forms of school based communication to parents. This includes email, face to face, print, phone messaging, text/ digital app(s), website, phone/ video conference, newsletters . powerschool notices /updates, | 2 | Parents |
| | • Prnt.Comm_Tchr. Bsd. (Teacher Based) | This code relates to forms of teacher based communication to parents. This includes, face to face, email, print, phone messaging, text/ digital app(s), website. phone/video conference, newsletters, powerschool notices /updates, | 1 | Parents |
| | • Prnt.Comm_typs.comm.ONE (Type 1) | This code relates to types of communication approaches: 1 way: authoritative, position from the "sender": (i.e. newsletters, announcements, assemblies/lectures). | 1 | Parents |
| **PARENT EMPOWERMENT** | | **Category that encompasses how parents are informed and organized so that they can fully participate in SA school's community.** | **1** | |
| | • Prnt.Empw._barr_to (Barriers to) | SA/ ISD policies, and practices, that are discussed in interviews which create a hindrance to informing/ organizing (explicitly, or implicitly) parents and families so that they can fully participate in SA school community. | 1 | Parents |
| **PARENT ENGAGEMENT** | | **This category refers to how families and teachers share the responsibility to help students reach their academic goals at SA. NOTE: Family Involvement is a step towards family engagement.** | **1** | **Parents** |
| | • Prnt.Eng_Demonst.Of (Demonstration of) | This code relates to how parents/ family members at SA demonstrate that they are engaged with their school setting in light of improving their child's/ ren's performance and collaborating to support their learning. | 1 | Parents |
| **PARENT FAMILY NEEDS** | | **This category encompasses parent/family needs and how SA identifies, anticipates, and responds to the unique needs of parents and families in the setting. This includes identifying specific school/ classroom practices and identifying/ tweaking school policies.** | **15** | |
| | • Prnt_Fmly.Nds_Trans.Consid. (Transition Consideration) | This code relates to how SA identified and addressed priorities for families as they transitioned to the ISD district. | 2 | Parents |
| | • Prnt. Fmly. Nds_Sch. Stf. Qual. (School Staff Quality) | This code addresses any information conveyed in the interview that pertains to the quality of SA school staff that may or may not enhance the classroom experience | 5 | Parents |
| | • Prnt.Fmly. Nds_Add. (Addressed) | This code relates to how parent and family needs are addressed through problem solving, and resolved by the administration, teachers, staff, and community members, | 1 | Parents |
| | • Prnt.Fmly.Nds_Avail.Res | This code relates to how SA ISD addresses/or fails to address family needs through the availability of resources | 1 | Parents |
| | • Prnt.Fmly.Nds_Barr. Chall. (Barriers/Challenges | SA/ ISD policies, and practices, that are discussed in interviews which create a hindrance (explicitly, or implicitly) to parents and families and their support in helping their child within the setting. | 3 | Parents |

## APPENDIX A CONT.

ISD Coding Scheme (Applied Codes)

| Category | Subcode | Definition/Description | f | Code Groups |
|---|---|---|---|---|
| | • Prnt.Fmly.Nds_Respon. (Responsiveness) | This code relates to how SA supports being responsive to the identified/ anticipated needs of parents and families within the setting. This includes how SA identifies resources for parents/ and families to support their needs. | 2 | Parents |
| | • Prnt.Fmly.Nds_Schl.Env. (School Environment) | This code discusses anything conveyed about the overall climate/ culture of the school environment that had a positive or negative impact on families at SA. | 2 | Parents |
| **PARENT INVOLVEMENT** | | **This category ties to the active, ongoing participation of a parent or primary caregiver in the education of a child.** | **1** | |
| | • Prntl.Invol._barr.to (Barriers to) | SA/ ISD policies, and practices, that are discussed in interviews which create a hindrance to encouraging parents/ families (explicitly, or implicitly) so that they can fully be involved in SA school community. | 1 | Parents |
| **STUDENT EXPERIENCES** | | **This category encompasses the overall experiences of students and how SA develops these experiences for students through enhancing the school culture, identifying specific school/ classroom practices, and identifying/ tweaking school policies.** | **17** | |
| | • Std. Exp_Ac. Bar (Academic Barriers) | SA/ ISD policies, and practices, that are discussed in interviews which create a hindrance (explicitly, or implicitly) to academic achievement, or gains for students in their classroom setting. | 6 | Students |
| | • Std. Exp_Ac. Gwth (Academic Growth) | SA/ ISD policies, and practices, that are discussed in interviews that tie to supporting academic achievement, or gains for students in their classroom setting. | 3 | Students |
| | • Std. Exp_Tch. Stud. Real. (Teacher-Student Relationship) | This code relates to how student experiences at SA are shaped by teachers and student relationships within and beyond the scope of the classroom. This specifically addresses the explicit practices that teachers use at SA to support their student's relationships. | 4 | Students |
| | • Std.Exp_Clss. Env. (Classroom Environment) | This code discusses anything conveyed about the overall climate/ culture of the classroom environment that had a positive or negative impact on students at SA. | 3 | Students |
| | • Std.Exp_Tr.Qual. (Teacher Quality) | This code addresses any information conveyed in the interview that pertains to the qualifications of the teachers at SA that may or may not enhance the classroom experience | 1 | Students |
| **STUDENT NEEDS** | | **This category encompasses the overall needs of students and addresses how Southside Ashpole supports these needs through instruction, services, and student support.** | **7** | |
| | • Std.Nds_Aca. (Academic) | This relates to how student needs are addressed academically through varied instructional delivery or additional instructional support or resources. | 5 | Students |
| | • Std.Nds_SEL (Social Emotional Learning) | This relates to how student needs are addressed through SEL curriculum and or practices. These needs also tie to additional support from student services staff such as: counselors, social workers, assigned mentors, advisors. | 2 | Students |
| **TRANSLATION OF STUDENT OUTCOMES** | | **This category relates to any academic, social emotional, or developmental outcomes for students within SA.** | **6** | |
| | • Trans.Std.Out._Barr (Barriers) | This code relates to the responses from interviewees that discuss any student outcomes that are perceived to be a barrier to their child in relation to attending SA. This also includes specific barriers that have been identified that prohibit communication, academic support, and services and creating solutions/ support for parents and their children at SA. | 4 | Student Outcomes |
| | • Trans.Std.Out._Ben. (Benefits) | This code relates to the responses from interviewees that discuss any student outcomes that are perceived to be of benefit to their child in relation to attending SA. This also includes efforts the school has made to communicate success(es), being transparent about academic services, and creating solutions/ support for parents and their child/ren at SA | 2 | Student Outcomes |

## APPENDIX B

Interview Questions: Parents/ Families

1). How long has your child/ children been at Southside-Ashpole?

2) What grades are they in?

3) How was your child's experience at Southside-Ashpole?

4) In what ways was Southside-Ashpole able to meet the needs of your child?

5). How would you describe the communication you received from staff and administrations at Southside-Ashpole about your child's success and/or concerns?

6). How did being part of the ISD impact your experience as a parent at Southside-Ashpole?

7). How did being part of ISD impact your childs' experience at Southside- Ashpole?

8). What do you see being the biggest challenges for Southside-Ashpole?

9). Are there any specific ISD policies that have benefited your child/ ren at Southside-Ashpole

10) What types of support has Southside Ashpole provided, that you feel has benefited your child(ren) / your family?

11). What changes/ accomplishments are you most proud of at Southside Ashpole?

12). How did ISD play a role in these changes/accomplishments?

## APPENDIX C

Informed consent for Phone Interviews

Hello, my name is Dr. Erin W. Manuel/ Elly Thompson

I am a research analyst/ intern from the Office of Learning Recovery and Acceleration at the North Carolina Department of Public Instruction. I am conducting research about the perspectives and experiences of the Southside Ashpole ISD (district) implementation. We are conducting interviews in order to gain insight about the outcomes and impacts for families and students in the Southside Ashpole ISD District.

Your participation is completely voluntary. This means that you do not have to participate in this phone interview unless you want to. Would you be willing to answer some questions about your perspective on the Southside Ashpole ISD implementation? This phone interview will take (approximate 20-25 minutes) (If yes, continue. If no, thank them for their time and end the call.)

Thank you for agreeing to participate. I hope that you will do your best to answer all the questions, as it is helpful to have the most complete interview possible. However, if you find some of the questions difficult or sensitive in nature and do not wish to answer a question, just tell me and we will skip it, and go on to the next one. You also need to understand that all information that I receive from you by phone, including your name and any other identifying information {if applicable}, will be strictly confidential and will be kept under lock and key.

I will not identify you or use any information that would make it possible for anyone to identify you in any presentation or written reports about this research. If it is okay with you, I might want to use direct quotes from you, but these would only be cited as from a person (or if a person has a specific label or title, it might be used). There is no expected risk to you for helping me with this study. There are no expected alternatives or benefits to you either.

When I get back all the interviews of everyone who has agreed to participate, I will group all the answers together in any type of report or presentation. There will be no way to identify individual participants.

Do you still want to talk with me? Yes/ No [If yes continue, if no thank them for their time]

Remember, your participation is voluntary; you do not have to complete these questions.

Do you have any additional questions?

You can also call Dr. Jeni Corn at () with any questions you have regarding this research? Do I have your permission to begin asking you questions? [If yes continue, if no thank them for their time]

Do I have your permission to record? [If yes begin recording  if no take notes].[Denote beginning time on recorder].

******[Once recording is complete thank them again for their time. Notify them that you can send a copy of this consent form to their email address].