Carnegie Foundation for the Advancement of Teaching

# ASSESSING-TEACHING-IMPROVING-LEARNING CONVENING

# Carnegie Value-Added Knowledge Network

## Meeting Summary

Report prepared by: Alicia Grunow, Jeannie Myung, Anthony S. Bryk and Paul LeMahieu

**April 25-26, 2012**
Carnegie Foundation for the Advancement of Teaching

*Funded through a cooperative agreement with the Institute for Education Sciences*

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Convening #4
April 25-26, 2012
Stanford, CA

# Meeting Summary

## Overview

On April 25-26, 2012, the Carnegie Foundation for the Advancement of Teaching convened a group of five leading quantitative educational researchers and a group of ten K-12 school system leaders involved in the use of value-added measures for teacher evaluation policy (See Appendix A for participant list). Together, the group worked to think deeply about the challenges associated with the use of value-added measures for teacher evaluations and next steps for leveraging the Carnegie Value-Added Knowledge Network for addressing the critical knowledge gaps in the technical aspects of value-added.

## The Problem the Carnegie Value-Added Knowledge Network is Trying to Address

Value-added methods are rapidly being introduced and applied in districts across the country to measure the effectiveness of teachers and schools. States and districts are implementing teacher evaluation systems that use value-added methodologies, in conjunction with measures of teacher practice, to inform consequential personnel decisions. The statistical challenges of isolating the impact of a classroom teacher are non-trivial and many technical questions are not yet resolved. Many quantitative experts are independently conducting research on modeling teacher effectiveness using value-added methodology. Topics chosen for study are frequently dependent on data available to researchers or driven by researchers' own theoretical or methodological interests. Furthermore, many of the leading experts in this field are tied to commercial interests or policy stances regarding the use of these methods.

Most significant, the state of knowledge in the field is constantly changing as policy attention is fueling a great deal of new research on value-added. The vast amount of information and the cacophony of differing perspectives on value-added available on the internet can be overwhelming to educators interested in understanding the implications of value-added on their work. Add to this the fact that most findings are written in highly technical language, fully comprehensible only to trained statisticians and econometricians, and one can readily see why much necessary knowledge is inaccessible to the very professionals who must work with it to make many practical decisions about the design and implementation of systems to evaluate teaching.

Research with the potential to affect the lives of hundreds of thousands of teachers and millions of students is rapidly accumulating. In the absence of a mechanism by which these findings are

translated and incorporated into the design and administration of teacher evaluation systems, these systems will not benefit as the state-of-the-art knowledge improves.

## GOALS

In light of these problems we see in the field, we had a range of goals on multiple levels for our project writ large and for this convening in particular. Our overall goal is to deepen educational leaders' understanding of value-added methodology and the inferences that can be made with its use for the evaluation of teachers. The project goal is to design and maintain a Web 2.0 resource that provides K-12 teacher evaluation system designers with the latest, most reliable research on value-added methodologies for teacher evaluation. In service of these goals, the convening objectives were the following: to endorse the first five entries for investigation in the Value-Added Knowledge Network, to co-develop a process with clear roles and responsibilities for developing the first five entries.

## GUIDING PRINCIPLES OF THE CARNEGIE VALUE-ADDED KNOWLEDGE NETWORK

We identified the principles we want to guide the creation of the Carnegie Value-Added Knowledge Network.

- Problem-Focused and User-Centered: focusing single-mindedly on the needs of end-users in the field, educational leaders tasked with translating teacher evaluation policy into operational rules on the ground.

- Identifies and Addresses Knowledge Gaps: not just summarizing what is known on value-added, but focusing on what is not yet known in areas of importance and move toward creating knowledge in those areas.

- Accessible to Users in Language and Format: keeping the end-user in mind in the content, language, and format of what's presented.

- Maintains High Standards of Evidence-Based, Technical Rigor: substantiating the claims made with degrees of warrant based on evidence.

- Represents a Balance of Perspectives, Free of Commercial Interests: mapping the entire argument space on a topic by presenting competing claims and weighting their relative merit based on evidence, not based on ideology or market opportunities.

- Stays Current, Reflects Ongoing State-of-the-Art Conversation: staying up-to-date and reflect current best thinking in a field that is constantly changing.

## QUESTIONS FOR INVESTIGATION IN ROUND ONE

Each technical expert identified the entry they would author in the first round:

1. What are potential interpretations of and caveats with using value-added in the context of individual personnel decisions? (Steve Raudenbush).

   Initial thoughts on approach: Potential uses for and interpretations of value-added will differ by the user and purpose for which the information will be used. This entry will distinguish between information contained in value-added for the individual teacher and for the district personnel decision-maker, and will lay out key considerations for each case.

2. To what extent are an individual teacher's effects consistent across students? across subjects? from year-to- year? (Susanna Loeb)

   Initial thoughts on approach: This entry will address heterogeneity in teacher effects and will look at what the research shows in terms of the consistency in value-added results for a teacher with one groups of students to another, from one subject to another, and from year to year.

3. What are the properties of different methods of evaluating teachers and how comparable are they with the properties of value-added? (Doug Harris)

   Initial thoughts on approach: This entry will identify the properties of valid assessments for personnel decisions.[1] The properties of value-added will be assessed alongside the properties of other measures for evaluating teachers, such as student learning objectives, teacher observations, student surveys, etc.

4. How can we distinguish between noise versus bias in value-added estimates? (Daniel McCaffery)

   Initial thoughts on approach: Value-added measures, like most measures of any kind, are subject to a certain degree of uncertainty. This uncertainty can be systematic (bias) or random (noise). This entry will describe the differences between the two in an effort to build the collective understanding of the inferences that can and cannot be made with value-added.

5. How much of a difference, in terms of ranking of teachers, does the specification of the model make? (Daniel Goldhaber)

   Initial thoughts on approach: This entry will address both model choice and specification of model. It will also investigate how much of a difference the model makes in different kinds of environments.

[1] Using APA/AERA standards as one potential framing (see Hill, Kapitula and Umland, 2010)

## Common Framework for Entries

The questions for investigation all range in topic and content, however, each entry will be anchored in a consistent framework:

1) What is the current state of knowledge? What are the alternative working hypotheses in the field and what are their degrees of warrant?
2) What more needs to be known on this issue?
3) What can't be resolved by empirical evidence on this issue?
4) To what extent, and under what circumstances, does this issue impact the decisions and actions that districts can make on teacher evaluation?

## Convening Agenda

The broad range of expertise and perspectives present at this meeting was an enormous asset. Collaboration between practitioners and researchers strengthens the work of both parties, but opportunities for rich conversations across the two groups are rare. The success of this venture depends on the voices of both practitioners and researchers to strategize best approaches to handling issues at the nexus of where the technical frontier of research meets the urgency of policy implementation.

The depth and breadth of knowledge and perspectives at this convening also posed a challenge. We wanted to surface and honor the diverse viewpoints of each participant, and yet we also needed to drive toward discrete decisions by the end of the day-and-a -half.

To best leverage the diversity of expertise among our participants, we designed the convening according to a progressive decision-making process model. The participant agenda can be found in Appendix B, and a process map of the convening is presented in Appendix C. We structured the convening to maximize participation, engagement, and productivity. We also structured the grouping conversations to best leverage the utility of the diversity of roles in the room. Depending of the session objective, participants were grouped in whole-group sessions, role-alike break-outs, or cross-role break-outs.

In broad strokes, we began with creating a shared and concrete vision of the type of knowledge needed on value-added, followed by a period of divergent thinking in which we envisioned the possibilities for the Network, and finally converging on critical components of a process for producing content to be share online.

We describe notable convening elements of the convening agenda in more detail in Appendix D. Participant evaluation of the convening is presented in Appendix E.

**Appendix A: Participant Biographies**

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Carnegie Value-Added Knowledge Network Launch

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# PARTICIPANT BIOGRAPHIES

**Aviva Baff** is Project Assistant at the Office for Educator Effectiveness Policy & Programs at the New York State Education Department. After working as an Account and Project Manager at CondéNet, the Internet division of The Condé Nast Publications, Inc., she entered education as a NYC Teaching Fellow. After teaching at a Title I school in Brooklyn, NY, including the AVID (Advancement Via Individual Determination) Program, she became Deputy Head of English at a Bilingual World IB School in Lima, Peru. There, she taught the International Baccalaureate Diploma Program and the International General Certification of Secondary Education from Cambridge University, and was involved in the redesign of secondary school curriculum and articulation of the curriculum across the P-12 continuum. In the Race to the Top group, Educator Effectiveness Policy & Programs, at the New York State Education Department, she is involved with several projects, including the Strengthening Teacher and Leader Effectiveness Request for Proposal, the Teacher Incentive Fund Grant, and the 2012-2013 APPR Conference. She has a B.A. in Literature and Rhetoric from SUNY Binghamton, and an M.S.T. specializing in Adolescent Education from Pace University.

**Andy Baxter** is the director of the Charlotte Mecklenburg Schools' Center for Human Capital Strategies. After participating in and supporting the Strategic Data Project's human capital diagnostic process, Andy has led the creation of value-added ratings for all the teachers in Charlotte-Mecklenburg Schools. Andy extended the SDP diagnostic work to focus on the distribution of high performing teachers across his district. Andy works with teachers, parents, principals and community members to develop a new teacher evaluation system for CMS. Andy holds an AB and MDiv from Duke University, and a PhD in Public Policy from UNC Charlotte.

**Christopher Candelaria** is a doctoral student in the Economics of Education program at Stanford University. He graduated from Stanford in 2006 with a B.A. in Economics. Prior to his doctoral studies, he worked for four years as a research associate at the Federal Reserve Bank of San Francisco. His research interests include teacher labor markets, education finance, and quantitative methods in education research. At Stanford, Christopher is also pursuing a master's degree in Economics.

**Julie Durham** is the Director of Grants and Research for the Michigan Association of Public School Academies (MAPSA). MAPSA provides leadership to advance quality and promote choice in education through chartered public schools and their supporters, offering every Michigan child an opportunity to learn. Prior to her current position, Julie served as Project Manager and Associate Researcher Center on Education and Work. Julie holds a Masters in Public Affairs from the University of Wisconsin-Madison and a B.S. from Central Michigan University.

**Amy Farley** is Strategic Data Fellow at the Colorado Legacy Foundation. She joined CLF in February, 2012 on a two-year fellowship with the Strategic Data Project, housed at the Center for Education Policy Research at Harvard University. The SDP Fellowship places analysts in partner agencies where they work to influence policy decisions that impact student outcomes and transform key policy and management decisions through robust data analysis. Amy is also finishing her Ph.D. from CU-Boulder's School of Education, studying Educational Foundations, Policy, and Practice, with an additional emphasis in research methods. Prior to graduate school, she was a teacher in both a low-income, rural public elementary school and a private, affluent suburban K-8 school. The discrepancy between the services and opportunities afforded to students in these two schools inspired her commitment to social justice in education. Toward this end, Amy's research agenda broadly focuses on educational policy analysis, and how policies and reform efforts affect low-income students, students of color, and other disadvantaged populations. Before joining CLF, Amy's most recent research included an evaluation of Denver Public School's alternative teacher compensation program, known as ProComp, and an investigation of how education policy is affected by state ballot initiative processes.

**Dr. Terry Froman** is a senior statistician for the public school system in Miami, Florida. His responsibilities include the design, conduct, and interpretation of educational research and statistical consulting for various departments and special project administration. His work experience includes director of research at Miami Community College, professor of research for the Graduate School of Education at the University of Miami, and research psychologist for the Center for Educational Research and Evaluation at the Research Triangle Institute. He received his doctorate in Quantitative Methods in the Social Sciences from the University of California, Santa Barbara. He is a lifelong learner whose special interests include jazz harmonic analysis, engineering mechanics, and chess. He and his wife, Dr. Annmarie Law, a counseling psychologist in private practice, have resided in Miami for the last 30 years.

**Dan Goldhaber** is the Director of the Center for Education Data & Research (CEDR) and a Professor in Interdisciplinary Arts and Sciences at the University of Washington-Bothell. He is also an Affiliated Scholar at the Urban Institute, the co-editor of *Education Finance and Policy*, and a member of the Washington State Advisory Committee to the U.S. Commission on Civil Rights. Goldhaber previously served as an elected member of the Alexandria

City School Board from 1997–2002, and as an Associate Editor of *Economics of Education Review*. Goldhaber's work focuses on issues of educational productivity and reform at the K–12 level, with a current focus on the broad array of human capital policies that influence the composition, distribution, and quality of teachers in the workforce. Topics of published work in this area include studies of the stability of value-added measures of teachers, the effects of teacher qualifications and quality on student achievement, and the impact of teacher pay structure and licensure on the teacher labor market. Previous work has covered topics such as the relative efficiency of public and private schools, and the effects of accountability systems and market competition on K–12 schooling. Goldhaber's research has been regularly published in leading peer-reviewed economic and education journals such as: *American Economic Review, Review of Economics and Statistics*, *Journal of Human Resources, Journal of Policy and Management, Journal of Urban Economics, Economics of Education Review, Education Finance and Policy, Industrial and Labor Relations Review,* and *Educational Evaluation and Policy Analysis*. The findings from these articles have been covered in more widely accessible media outlets such as National Public Radio, the *New York Times*, the *Washington Post, USA Today*, the *Wall Street Journal*, and *Education Week*. Goldhaber's research has been funded by the U.S. Department of Education, the Carnegie Corporation of New York, the Bill and Melinda Gates Foundation, the Ewing Marion Kauffman Foundation, the Joyce Foundation, the Smith Richardson Foundation, and numerous other private foundations. Goldhaber holds degrees from the University of Vermont (BA, Economics) and Cornell University (MS and PhD, Labor Economics).

**Douglas Harris** is an economist and Associate Professor of Educational Policy and Public Affairs at the University of Wisconsin at Madison. His research explores the efficiency and equity of K-12 and higher education programs, especially teacher evaluation and accountability. He is the author of Value-Added Measures in Education (Harvard Education Press, 2011). In 2008, he chaired the 2008 National Conferences on Value-Added in Madison and Washington, DC. His research on value-added has been published in books journals (Education Finance and Policy, Journal of Policy Analysis and Management, and Journal of Public Economics). He is extending this work to a new project on measuring the performance of colleges and universities, and in ways that integrate value-added within a cost-effectiveness and productivity framework. He is also co-director of the Wisconsin Scholars Longitudinal Study (WSLS), analyzing a program that provides financial aid to randomly selected low-income college students. He is an affiliate of the Center for Analysis of Longitudinal Data in Education Research (CALDER) and his research has been supported with funding from the U.S. Department of Education and a variety of foundations: Carnegie Corporation, Gates, WT Grant, Joyce, Lumina, Smith Richardson, and Spencer.

**Susanna Loeb** is a professor of education at Stanford University, faculty director of the Center for Education Policy Analysis, and a co-director of Policy Analysis for California Education (PACE). She specializes in the economics of education and the relationship between schools and federal, state and local policies. Her research addresses teacher policy, looking specifically at how teachers' preferences affect the distribution of teaching quality across schools, how pre-service coursework requirements affect the quality of teacher candidates, and how reforms affect teachers' career decisions. She also studies school

leadership and school finance, for example looking at how the structure of state finance systems affects the level and distribution of resources across schools. Susanna is a senior fellow at the Stanford Institute for Economic Policy Research, a faculty research fellow at the National Bureau of Economic Research, a member of the Policy Council of the Association for Policy Analysis and Management, and Co-Editor of Educational Evaluation and Policy Analysis.

**David Lussier** is the Executive Director of Educator Quality for the Austin Independent School District. David was a high school history teacher in Massachusetts, where he earned National Board Certification and was named the Massachusetts Teacher of the Year in 2000. As a White House Fellow, David later served as Associate Director of Domestic Policy in the Clinton and Bush Administrations and participated in the development of the *No Child Left Behind Act.* After leaving the White House, David joined the National Board for Professional Teaching Standards, where he served as a policy advisor to the president of NBPTS and later as research director. David earned a Bachelors Degree in History from the University of Massachusetts Lowell, a Master of Arts in Teaching from Boston University, and Master's and Doctoral Degrees in educational leadership from the Harvard Graduate School of Education.

**Daniel F. McCaffrey** is a senior statistician at the RAND Corporation, where he holds the PNC Chair in Policy Analysis. He is a fellow of the American Statistical Association and is nationally recognized for his work on value-added modeling for estimating teacher performance. McCaffrey oversees RAND's efforts as part of the Gates Foundation's Measures of Effective Teaching study to develop and validate sophisticated metrics to assess and improve teacher performance. He is currently leading RAND's efforts on two additional studies comparing value-added measures to other measures of teaching, including classroom observations, and is a major partner in the National Center on Performance Incentives, which is conducting random control experiments to test the effects of using value-added to reward teachers with bonuses. He is co–principal investigator of a project funded by the Institute of Education Sciences (IES) that is developing alternative value-added models of teachers' effectiveness. McCaffrey is also the principal investigator of a National Institute on Drug Abuse–funded study, and recently worked on the design of an IES-funded random trial of the Cognitive Tutor Geometry curriculum. He led an evaluation of the Pennsylvania Value-Added Assessment Pilot Program (PVAAS) and was the lead statistician on two randomized field trials of school-based interventions: evaluations of the Project ALERT Plus middle and high school drug prevention program and the teen dating violence prevention curriculum, Break the Cycle. McCaffrey received his Ph.D. in statistics from North Carolina State University.

**Pati Montgomery** is a seasoned elementary and middle school principal, Pati Montgomery is currently the project director for the Jeffco Schools' strategic compensation pilot project, funded by a five-year federal Teacher Incentive Fund grant. Ms. Montgomery served as an editorial director and staff developer for an educational publishing firm and is the author of "A Principal's Primer for Raising Reading Achievement." She was a special and

regular education teacher for all grade levels and has been with Jeffco for 20 years. She also taught in Denver for five years. She received a B.A. in Elementary Education and a M.A. in Special Education.

**Jen Oliver** has served since 2010 as the state TAP director for 44 schools in Indiana. Prior to her role with TAP™: The System for Teacher & Student Advancement . Oliver served as a fellow for strategic initiatives with the Center of Excellence in Leadership of Learning (CELL) at the University of Indianapolis. where she focused on policy efforts to improve the high school-to-college transition for students. Oliver also worked as an assessment specialist at the Indiana Department of Education. At the school level, her experience includes ten years of teaching high school English as well as coordinating Advanced Placement, International Baccalaureate and Dual Credit programs. A graduate of Indiana University, Oliver earned a bachelor's in English and education, a minor in history and a master's in educational leadership.

**Stephen Raudenbush, Ed.D.,** is the Lewis-Sebring Distinguished Service Professor in the Department of Sociology at the University of Chicago and Chairman of the Committee on Education. He received an Ed.D in Policy Analysis and Evaluation Research in 1984 from Harvard University and was a professor in the School of Education at the University of Michigan from 1998 until 2005. He is a leading scholar on quantitative methods for studying child and youth development within social setting such as classrooms, schools, and neighborhoods. He is best known for his work on developing hierarchical linear modes, with broad applications in the design and analysis of longitudinal and multilevel research. Raudenbush has been the Scientific Director of the Project on Human Development in Chicago Neighborhoods, an ambitious study of how family, neighborhood and school settings shape the academic learning, social development, mental health and exposure to violence of children growing up in Chicago. He is currently studying the impact of residential and school mobility on student learning and developing new measures of school and classroom quality. He is a member of the American Academy of Arts and Sciences and the recipient of the American Educational Research Association award for Distinguished contributions to educational research.

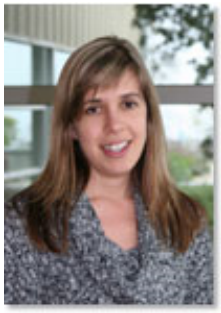
**William J. Slotnik**, is the Founder and Executive Director of the Community Training and Assistance Center (CTAC) in Boston, Massachusetts. CTAC builds district, state, and community capacity by providing technical assistance, conducting research and evaluation, and informing public policy. CTAC annually assists more than 90 organizations. He has provided extensive assistance to state education agency leaders, superintendents, state and local boards of education, unions and leadership teams throughout the United States. He has been the lead or co-lead author of numerous evaluations (including "Pathway to Results" and "Catalyst for Change" —the first comprehensive, longitudinal evaluative studies of the impact of performance-based compensation on student achievement, teacher effectiveness and systems change) and articles, and provides briefings to members of the U.S. Congress, the U.S. Department of Education, state legislatures and departments of education, and the media.

**Roddy Theobald** is a former 7th-grade math teacher and PhD student in statistics at the University of Washington. His research at CEDR combines his interest in teaching and public education with his current training as a statistician by applying statistical methodology to problems like teacher evaluation and layoffs.

**Page Tompkins** is the Executive Director for the Reach Institute for School Leadership in Oakland, California. Page has worked to develop transformative educational experiences and organizations locally and internationally for twenty years. Prior to co-founding Reach, Page worked as a Program Director for the school reform and improvement program at On The Move, a Bay Area non-profit organization dedicated to fostering effective leadership and high functioning organizations in the public sector. He was also the founding director of the Bay Area School of Enterprise, a small charter high school launched in 2001, which served youth who were unsuccessful in traditional schools. Page has played diverse leadership roles in the non-profit and educational fields, including serving as the Program Director for Outward Bound South Africa and as the Executive Director of Our Schools, a non-profit focused on school reform in San Francisco public schools. Page earned his Doctorate in Educational Leadership at the University of California, Berkeley and holds a California Clear Teaching Credential in Social Science.

## CARNEGIE STAFF BIOGRAPHIES

**Anthony S. Bryk** is the ninth president of The Carnegie Foundation for the Advancement of Teaching. He held the Spencer Chair in Organizational Studies in the School of Education and the Graduate School of Business at Stanford University from 2004 until assuming Carnegie's presidency in September 2008. He came to Stanford from the University of Chicago where he was the Marshall Field IV Professor of Urban Education in the sociology department, and where he helped found the Center for Urban School Improvement, which supports reform efforts in the Chicago Public Schools. He also created the Consortium on Chicago School Research, a federation of research groups that have produced a range of studies to advance and assess urban school reform. His current research and practice interests focus on the organizational redesign of schools and school systems and the integration of technology into schooling to enhance teaching and learning.



**Alicia Grunow** is the Senior Managing Partner for Learning Teaching at the Carnegie Foundation for the Advancement of Teaching. She leads the Foundation's program of work focused on the development of assessments and practices for the purposes of improving teaching. She also leads efforts to adapt tools from improvement research to support change efforts in education. Her background has afforded her with an unusual combination of practical experience in the development of teachers and technical skills in statistical analysis. For the past four years she has worked as in instructor in Stanford's Teacher Education Program (STEP), teaching classes on practices

to support the academic achievement of English Language Learners. During that time she also worked as a research assistant on a variety of projects, conducting large-scale quantitative analyses. She has a masters in economics and doctorate in educational administration and policy analysis at Stanford University. Grunow received her B.A. in Psychology from Reed College in 1999 and completed the Bilingual and ESL Teachers Leadership Academy at Bank Street College in 2005. Before coming to Carnegie, she taught for seven years in elementary school programs designed for English Language Learners in both Denver and New York City.

**Paul G. LeMahieu** is the Senior Managing Partner for Design, Development, and Improvement Research at the Carnegie Foundation for the Advancement of Teaching and is graduate faculty in the College of Education at the University of Hawai'i – Mānoa. His scholarly interests focus on educational assessment and accountability as well as classroom learning and the professional development and policy environments that support it. From 2002 to 2010, LeMahieu was Director of Research and Evaluation for the National Writing Project at the University of California, Berkeley. Prior to that, LeMahieu served as Superintendent of Education for the State of Hawai'i, the chief educational and executive officer of the only state system in the United States that is a unitary school district, serving nearly 200,000 students with annual budgets totaling over $1,800,000,000. LeMahieu has published extensively on issues as diverse as testing policy and practice; educational accountability; staff development; school effectiveness; nontraditional work roles for women; minority achievement issues; science education; and vocational education. He has received a number of major awards for his contributions to educational theory and practice from the American Educational Research Association, the Evaluation Research Society, the Buros Institute of Measurement, the National Association of Test Directors, and the Association for Supervision and Curriculum Development. He has been President of the National Association of Test Directors and Vice President of the American Educational Research Association. He served on the National Academy of Sciences' Board on International Comparative Studies in Education, and Mathematical Sciences Education Board. He is a Founding Director of the Center for the Study of Research on Expertise in Teaching and Learning, served on the National Board on Testing Policy, and the National Board on Professional Teaching Standards. LeMahieu holds degrees from Yale College (AB), Harvard University (EdM), and University of Pittsburgh (PhD).

**Krissia Martinez** is the Learning Teaching Research Assistant. She is a recent graduate of UC Santa Cruz where she served as an academic peer advisor for one year, and worked for two years as a research assistant and participated in the Chicano Latino Research Center's Undergraduate Research Assistantship program. She also spent her 2010 Summer as an intern for the Interuniversity Consortium for Political and Social Research at the University of Michigan at Ann Arbor. She received her B.A. in Latin American/ Latino Studies and Legal Studies. Krissia hopes to pursue a graduate degree in education.

**Jeannie Myung** is a research associate for the Learning Teaching program at the Carnegie Foundation for the Advancement of Teaching. Previously, she has worked as a researcher for the Teacher Pathways Project, the School Leadership Research Project of the Center for Education Policy Analysis, and the Institute for Research on Education Policy and Practice. She has published work on new teacher mentoring, teacher recruitment and retention policies, and teacher and principal career pathways. She completed her doctoral work in Administration and Policy Analysis at the Stanford University School of Education. Her dissertation focused on school district personnel practices around the selection and development of teacher leaders. She previously taught in an elementary public school in San Jose, California. Jeannie holds a B.A. in Political Science from Yale College.

**Thomas Toch** is a leading education policy expert and a highly regarded education writer. He is a founder and former co-director of the think tank Education Sector and he has been executive director of Independent Education, a consortium of private schools in the Washington, DC, region. He spent a decade as the senior education correspondent at U.S. News and World Report and has contributed to The Atlantic, The New York Times, and other national publications. Toch has been a guest scholar at the Brookings Institution and has taught at the Harvard Graduate School of Education. He helped launch Education Week in the 1980s, serving variously as writer, commentary editor, and co-managing editor at the newspaper. He has authored two books on American education, In the Name of Excellence (Oxford University Press) and High Schools on a Human Scale (Beacon Press) and he currently writes the monthly WashingtonView column for Kappan magazine and is a regular contributor to the National Journal's Education Experts blog.

**Kareen Mo Yang is** the Program Manager for the Learning Teaching program at the Carnegie Foundation for the Advancement of Teaching. Before coming to the Foundation in 2010, she was Research Manager at the National Writing Project at the University of California, Berkeley. In this role Kareen led the development and administration of the instrumentation and coding systems for the Legacy Survey, a major study that documents the career paths of over five thousand current and past participants in NWP programming. She also managed the National Scoring Conferences (including workflow design and maintenance as well as data entry and management) at which an average of six thousand pieces of student writing was scored annually. She has a B.A. in Psychology from UC Berkeley.

**Appendix B: Convening Agenda**

# Carnegie Value-Added Knowledge Network

Launch Convening • April 25-26, 2012 • Stanford, CA

## Participant Agenda

**Overarching Goal:**
To deepen educational leaders' understanding of value-added methodology and the inferences that can be made with its use for the evaluation of teachers.

**Project Goal:**
To design and maintain a Web 2.0 resource that provides education policymakers and practitioners with the latest, most reliable research on value-added methodologies for teacher evaluation.

**Convening Goals:**
To endorse the first five entries for investigation in the Carnegie Value-Added Knowledge Network.
To co-develop a process with clear roles and responsibilities for developing the first five entries of the Dynamic Knowledge Network.
To agree upon deliverables and timelines for developing the first five entries of the Dynamic Knowledge Network.

## Wednesday, April 25

| | |
|---|---|
| 8:30-9:00am | Breakfast |
| 9:00-9:45am | **Welcome & Introduction to the Assessing-Teaching-Improving-Learning Program** |
| 9:45-10:15am | **Understanding the Problem We're Trying to Address** |
| 10:15-10:30am | Break |
| 10:30-11am | **Identifying the Contribution of the Carnegie Value-Added Knowledge Network** |
| 11-12:00pm | **Concurrent Sessions: Assessing Current Knowledge Gaps** |
| 12:00-1:00pm | Lunch |
| 1:00-2:30pm | **Determining Entry Topics** |
| 2:30-2:45pm | Break |
| 2:45-3:45pm | **Small Group Breakouts: Discussing Approaches to Topics & Key Considerations** |
| 3:45-4:15pm | **Gallery Walk of Key Considerations for Each Topic** |

4:15-4:30pm **Closing**

4:30pm- Reception and Dinner *followed by Shuttles to hotel*

## Thursday, April 26

8:00-10:15am **Working Breakfast for Technical Expert Panel**

8:30-9:00am Breakfast

9:00-9:45am **User Feedback on Carnegie Knowledge Network Web Design Prototype**

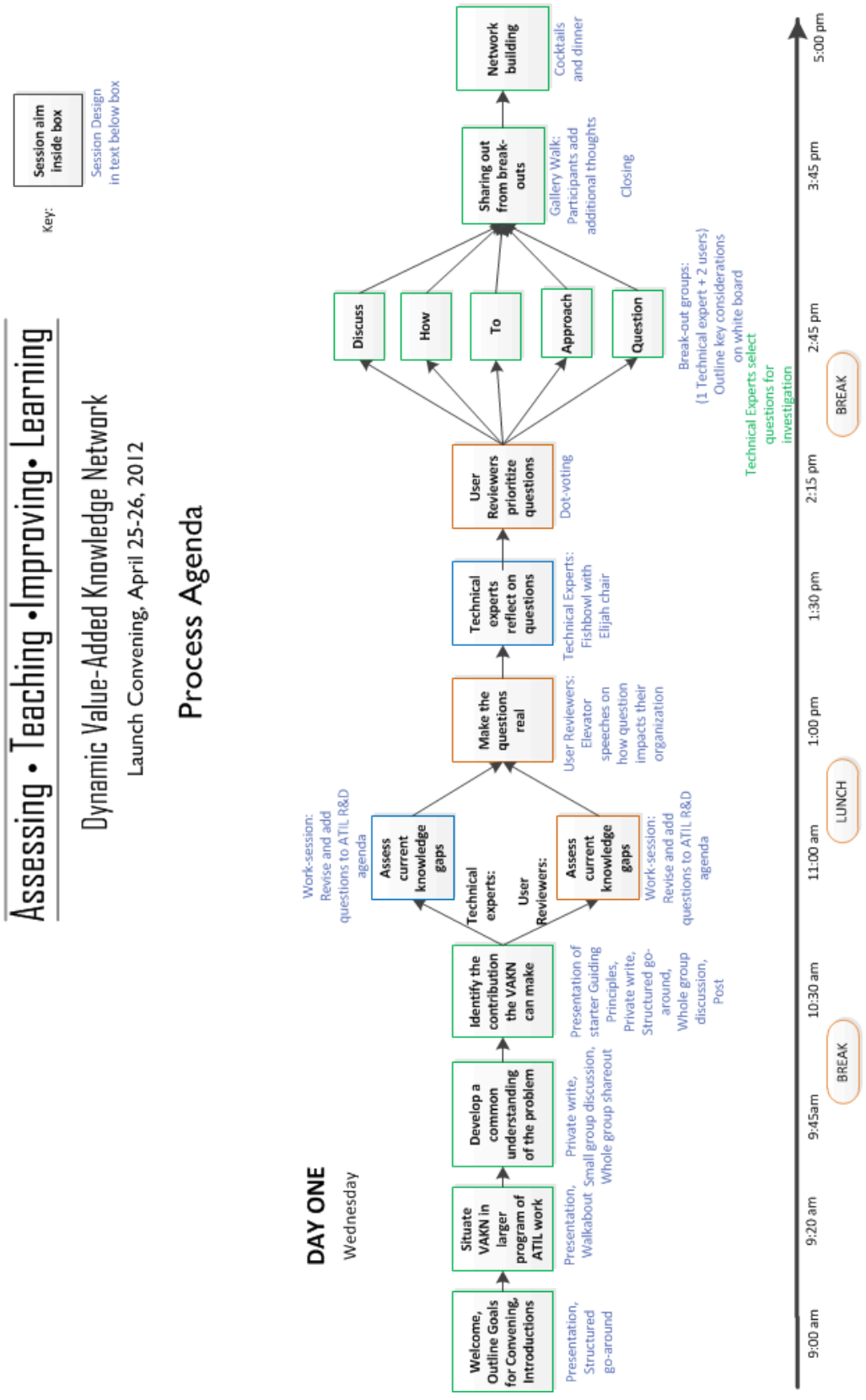
9:45-10:15am **90 Day Cycle: Human Capital Systems**

10:15-10:45am **Solidifying Roles & Responsibilities**

10:45-11:00am **Closing**

11:00am- Lunch.
*Box lunches available for those who need to depart immediately for the airport*
*Shuttles to airports*

## Appendix C: Convening Agenda Process Map



**Appendix D: Notable Convening Elements**

*SITUATING VALUE-ADDED KNOWLEDGE NETWORK INTO CARNEGIE'S PHILOSOPHY AND PROGRAMS OF WORK*

Tony Bryk, President of the Carnegie Foundation for the Advancement of Teaching opened the convening with an introduction to the work of the Foundation broadly. He situated the aims of the Value-Added Knowledge Network within the core principles of improvement that undergird the Carnegie approach to educational research and development. The following principles are painted onto the walls of our meeting room at the Foundation. Tony guided the participants in a walk-around as he discussed the core principles of improvement.

The Six Core Principles of Improvement

1. **Make the work problem-specific and user-centered.**
   It starts with a single question: "What specifically is the problem we are trying to solve?" It enlivens a co-development orientation: engage key participants early and often.

2. **Variation in performance is the core problem to address.**
   The critical issue is not what works, but rather what works, for whom and under what set of conditions. Aim to advance efficacy reliably at scale.

3. **See the system that produces the current outcomes.**
   It is hard to improve what you do not fully understand. Go and see how local conditions shape work processes. Make your hypotheses for change public and clear.

4. **We cannot improve at scale what we cannot measure.**
   Embed measure of key outcomes and processes to track if change is an improvement. We intervene in complex organizations. Anticipate unintended consequences and measures these too.

5. **Anchor practice improvement in disciplined inquiry**
   Engage rapid cycles of Plan, Do, Study, Act (PDSA) to learn fast, fail fast, and improve quickly. That failures may occur is not the problem; that we fail to learn from them is.

6. **Accelerate improvements through networked communities.**
   Embrace the wisdom of crowds. We can accomplish more together than even the best of us can accomplish alone.

*DEVELOPING A COMMON UNDERSTANDING OF THE PROBLEM: THE NATURE OF CURRENT LITERATURE ON VALUE-ADDED FOR PRACTITIONERS*

We then had a conversation on the status quo of knowledge on value-added to clarify the problem that the Knowledge Network is trying to address we are trying to address with the Knowledge Network. We had asked our participants to read a recent article by Linda Darling-Hammond, Audrey Amrein-Beardsley, Edward Haertel and Jesse Rothstein called "Evaluating Teacher Evaluation" (Phi Delta Kappan, March 2012). We did not choose it as a "good" or "bad" example, but rather as one example of an effort to synthesize technical matter into a

knowledge product for a practitioner audience. With regard to that article, we had participants reflect on this article as an example of a knowledge product on value-added in small groups.

The following themes emerged in the discussion. The article was written in a language and format accessible to teachers and school leaders who have limited time to dedicate to learning about the technical workings of value-added models. The point of the article was clear and unequivocal – value-added is not a legitimate solitary measure for teacher evaluation. In its clarity of message, the article did not present a balanced framing of the issues. The authors made several critiques of value-added without representing the counter-points to their claims. Some of the participants thought the authors did not do an adequate job reconciling why value-added is inappropriate for teacher evaluation but appropriate for validating other measures, or why it is appropriate for informing policy decisions. On a related note, the participants thought the article did not apply the same standard of evidence to other measures of teacher evaluation. And finally, a number of participants thought that the article was not particularly useful, in light of the fact that their districts that have already chosen to implement value-added.

The conversation used one article as a jumping-off point, but ended up reacting to the nature of the translation of research for practitioners more broadly. What emerged from this conversation was the need for a balanced synthesis of issues, with the focus on understanding the characteristics of value added.

*ELEVATOR PITCHES*

The morning was dedicated to cultivating divergent thinking. We explored a range of functions and possibilities the Knowledge Network could serve. We sought to give participants an opportunity to reflect on their own opinions and consider new perspectives. The rest of the day was dedicated to moving toward converging that thinking toward a decision point – the five topics for investigation in the Value-Added Knowledge Network and the process for content production.

According to the Harvard Business Review, the average length of an elevator ride in NYC is 118 seconds[2]. In the previous session, each user reviewer chose one topic that is of high priority to them. Each user reviewer was given precisely118 seconds to talk about how their question impacted them in their places of work.

Our User Reviewers had an opportunity to "pitch" their ideas for their highest priority topic for investigation. Following that, the technical experts had an opportunity to react to the user pitches and to similarly discuss their highest priority topics. After these sessions, we prioritized across each of the topics.

[2] Harvard Business Review (2012, January 2). Why You Need a Better Elevator Speech, by Jeffrey Hayzlett [Blog post]. Retrieved from http://blogs.hbr.org/cs/2012/01/why_you_need_a_better_elevator.html.

*FISHBOWL*

Fishbowl discussions are a meeting structure to help build mutual understanding among people coming from different backgrounds or perspectives. The technical experts sat together around a round table and reflected on the issues raised in the elevator pitches and raised issues of importance to them. The User Panel sat in seats arranged in a concentric circle around the inner table and listened in on the discussion and learn more about their perspectives. The user panelists had an opportunity to interject a question into the fishbowl conversation. When user reviewers had questions, they were encouraged to stand up and move to the chair and stay seated until their question has been addressed. Three themes emerged:

1) Importance of defining the purpose of the value-added and its limited utility for identifying individual teacher effects to inform high-stakes decisions
2) The importance of reporting/messaging value-added results well
3) Unintended Consequences of rolling out value-added

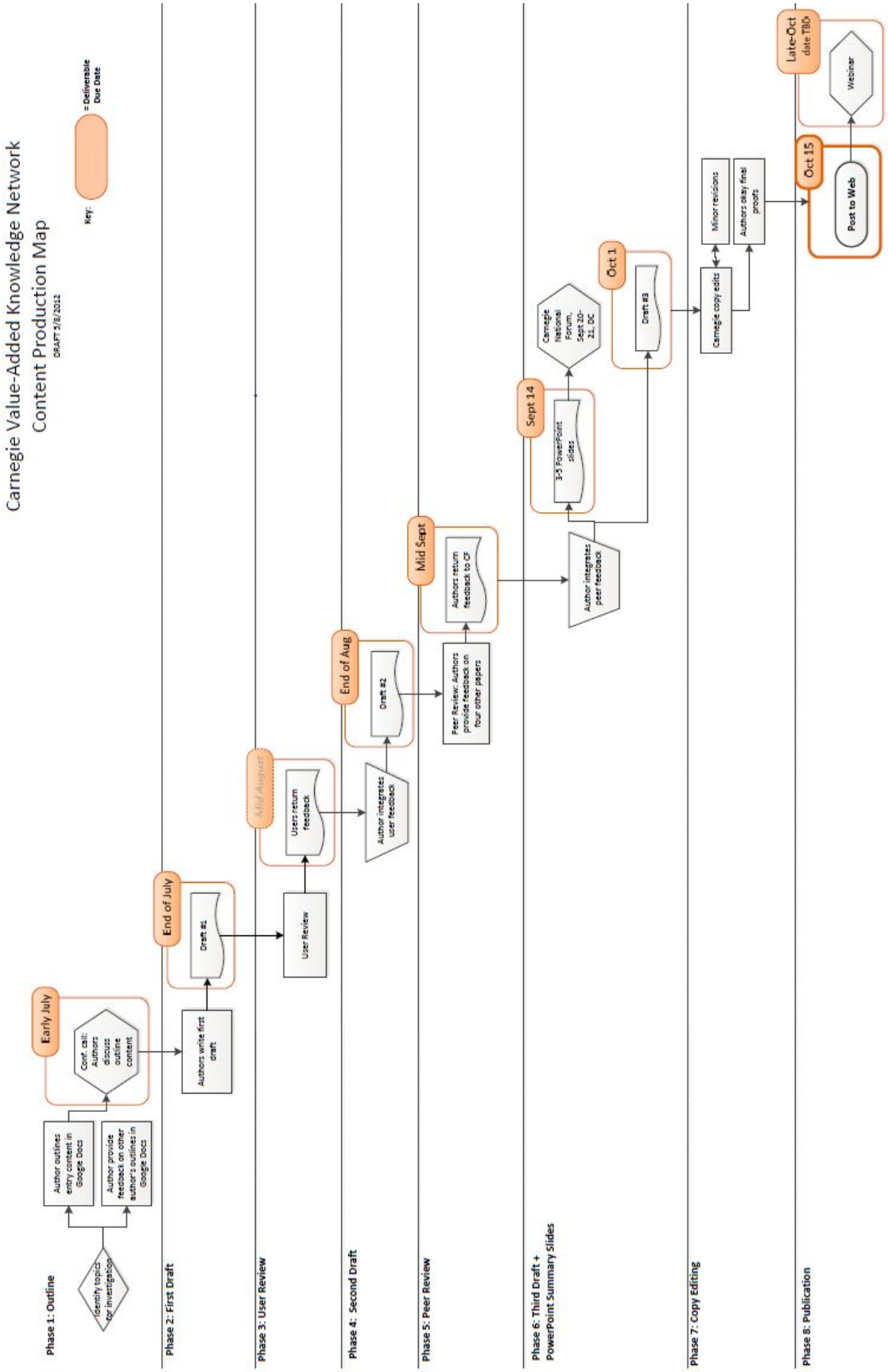
*DOT-VOTING*

We asked our user panel to prioritize the issues for investigation according to their own experiences in their districts, what they learned from their fellow user panelists' elevator pitches and the fishbowl conversation. The questions were posted on the wall and participants were asked to vote for the topics that they considered to be highest priority for the Network. Participants were given 5 sticky dots (the square root of the number of options). The technical experts then took the data from the data voting under consideration when choosing their topics for investigation.

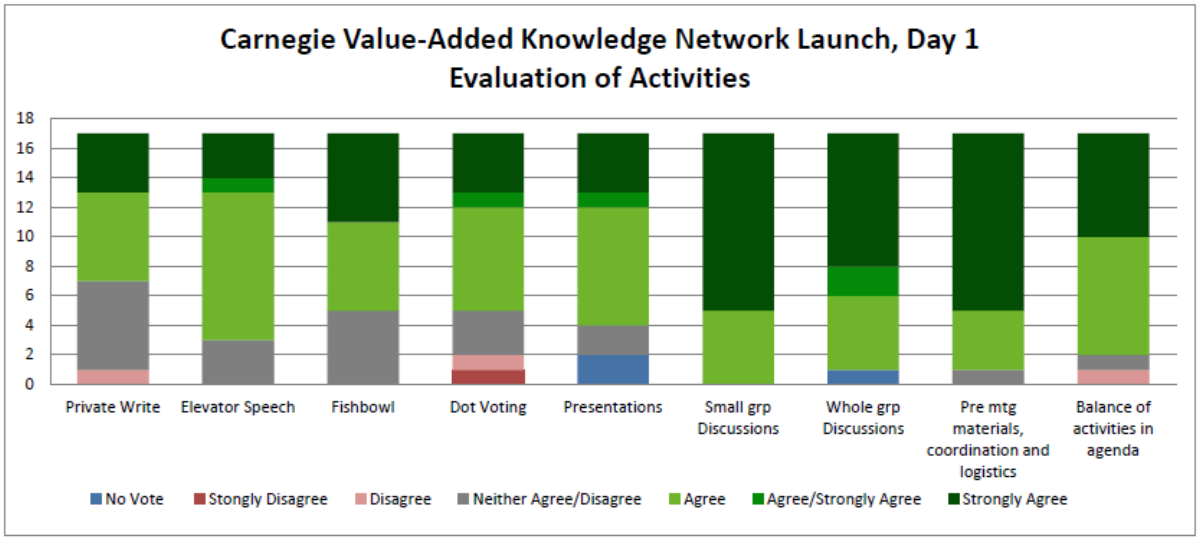
*CROSS-ROLE BREAKOUTS AND GALLERY WALK*

Once the topics were chosen, participants were separated into cross-role breakout groups. Each technical expert had an opportunity to discuss best approaches to answering the question with two user review panelists. These resulted in lively exchanges between authors and users in which all could further refine their sense of the specific knowledge product to be authored. Each small group took notes on the key attributes of the entry on a white board. Each group then had an opportunity to rotate through the other groups' white boards in a "gallery walk." Groups offered feedback and suggestions to the other groups at this time.

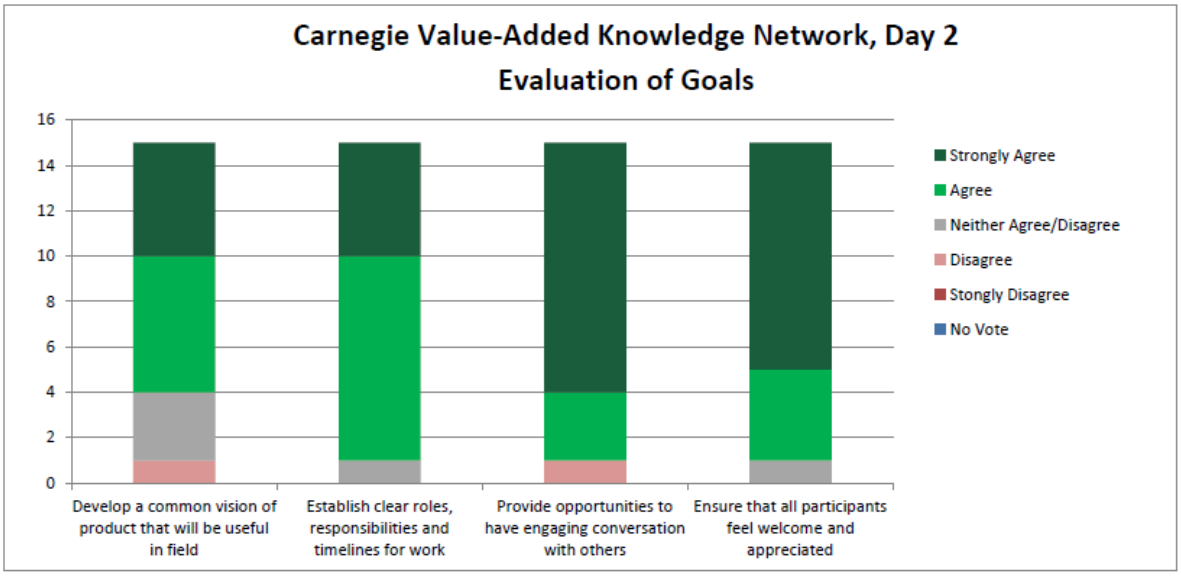
## Appendix D: Content Production Map



## Appendix E: Data from Participant Evaluation of Convening




| Highlighted/Common Positive Feedback | Highlighted/Common Suggestions | Highlighted/Concerned Feedback |
|---|---|---|
| • Day was stronger when both groups were together<br>• Fishbowl was interesting, and useful, took notes!<br>• Coordination was fantastic thank you!<br>• Gallery walk was a highlight<br>• White board work was found to be useful<br>• Would like to integrate some of these meeting techniques into their own organization's culture | • Read articles by the expert panel instead<br>• Big leap from morning to afternoon, more communication to clarify objective<br>• Have user panel write something as well<br>• Needed more time for private writes<br>• Regroup guiding principles: 3 culture, 3 process<br>• More facilitation of fishbowl<br>• Would like to know more of PD and VA measures | • Questions weren't innovative<br>• Voted on wrong questions<br>• Unclear expectations for user panelists<br>• Will this group convene again? |




| Highlighted/Common Positive Feedback | Highlighted/Common Suggestions | Highlighted/Concerned Feedback |
|---|---|---|
| • Activities were challenging and stimulating<br>• CF is a wonderful host<br>• Technical panelist seemed satisfied with this first meeting | • More time for users with scholars<br>• More clarity on follow up meetings | • Vision feels too technical and less practical<br>• Time commitment is worrisome<br>• Last second concerns from users of the vision - user panelists less satisfied |