ORIGO

STEPPING STONES 2.0

COMPREHENSIVE MATHEMATICS

VERSION 2

Implementation Handbook Version 2

ORIGO EDUCATION

Contents

Section 1: Introduction and overview

The *ORIGO Stepping Stones 2.0 Implementation Handbook* has been developed to assist schools and school systems with the process of implementing *ORIGO Stepping Stones 2.0* across their sites. This handbook is based on research into best practices for implementation. The content is clearly organized to guide school system leadership throughout the process. This handbook should be used by teams at district and school levels who are responsible for leading the implementation of *ORIGO Stepping Stones 2.0*.

Implementation research

In recent years, the education community has shifted its focus and expectations from research-based to evidence-based (or evidence-informed) programs and practices. While selecting evidence-based practices to improve outcomes for students is important, so is focusing on the research and best practice of *effective implementation* to produce consistent, sustainable, positive outcomes for students (see Figure 1). This means **what** schools are implementing is just as important as **how** they are implementing those practices to be successful.

Figure 1: Formula for success

Through a synthesis and meta-analysis of research findings and literature, the National Implementation Research Network (NIRN) has identified best practices and developed frameworks based on them.[1] Researchers found that effective interventions must be supported by effective implementation to have positive outcomes for students and families.[2]

The NIRN has summarized its findings into five frameworks for active implementation science:

1. Implementation Teams
2. Implementation Stages
3. Implementation Drivers
4. Usable Innovations
5. Improvement Cycles

The frameworks are not linear, but they can be used in unison to effectively implement evidence-based practices.[1]

Please note that this handbook is not meant to provide comprehensive knowledge of implementation science and instead uses this research as the foundation for the *ORIGO Stepping Stones 2.0 Implementation Handbook.*

Navigating the handbook

Researchers emphasize that effective implementation takes between two and five years, and should be delivered in stages.[1] This handbook is organized around four of these stages: Exploration, Installation, Initial implementation, and Full implementation. Each stage includes key activities for teams to prepare for the next stage of the process.

Section 2: Key personnel roles and responsibilities

This section outlines the roles and responsibilities of key personnel in *ORIGO Stepping Stones 2.0* implementation, including district math leadership, principals, math coaches, lead teachers, and the classroom teachers who will form implementation teams at the district and school levels. They will be directly involved in planning the implementation of the program. Districts should form a District Implementation Team (DIT), while each implementing site should have a School Implementation Team (SIT). These teams work collaboratively, forming communication and feedback loops to support effective implementation (see Figure 2). This section also provides recommendations for the composition of teams, the purpose and frequency of team meetings, and specific responsibilities of personnel involved.

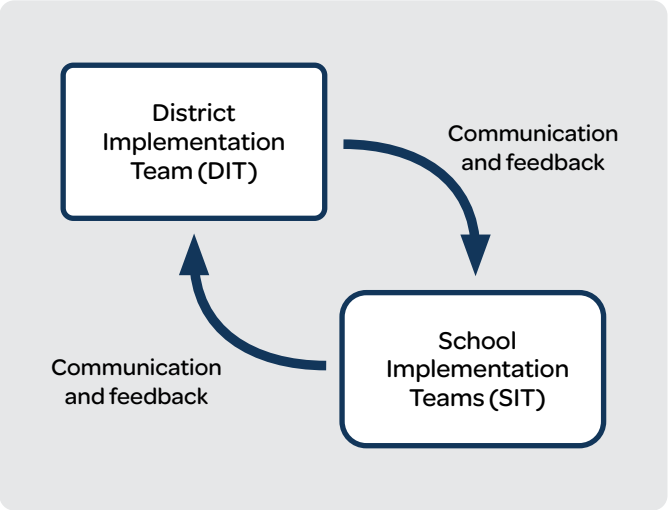

Figure 2: DIT and SIT communication and feedback loop

District Implementation Team

Building a District Implementation Team

The DIT consists of four to six members and is responsible for overseeing system-wide implementation. It is not an advisory group or committee. A district may consider having advisory groups or committees in addition to the DIT, but not in place of the team. **Note:** It is suggested that the DIT includes a math supervisor, elementary math specialists/coaches, key partners from other departments such as Special Education and/or Title I, and other personnel directly related to implementation. This team may also include representation from the Technology Department.

The DIT's responsibilities

This team establishes the vision and mission for the project. They are actively engaged in planning the implementation, and are responsible for the following:

- Developing an annual professional learning plan for *Stepping Stones* leads and participating teachers.
- Creating a data collection plan to monitor student outcomes and implementation fidelity data on a monthly, quarterly, and annual basis.
- Participating in school-level collection of implementation fidelity data using the Stepping Stones Implementation Tool (SSIT).
- Resolving implementation barriers to support effective implementation at the school and classroom levels.
- Analyzing implementation data to identify implementation strengths and needs and planning for additional supports to improve implementation data.
- Developing a communication plan and establish feedback loops between the district and schools.
- Seeking feedback from teachers, math coaches, School Implementation Teams (SIT), and stakeholders to adjust and refine the implementation plan as needed throughout the year.

The DIT is responsible for *making it all happen!*

Scheduling meetings

The DIT should meet at least monthly at a regularly scheduled time. The team may choose to meet more often during the initial stage of implementation (for example, weekly or twice a month).

Engaging stakeholders

The DIT may seek feedback through a project advisory group including other stakeholders (for example, classroom teachers, math coaches, central office special education administrators, and parents). The team may meet quarterly with the advisory group to present progress updates and seek input on the implementation plan.

Principals

The principal's responsibilities

As with any school initiative, school-level implementation cannot succeed without the commitment of the principal. A principal should have, or be willing to work toward, a strong belief in building students' conceptual understanding of mathematics. They should believe that all students can learn mathematics at high levels if they are afforded a first-class curriculum, instruction, and assessment. Principals of schools selected to implement the *Stepping Stones* program should also:

- Honor programs and frameworks currently in place and communicate how *Stepping Stones* fits within those structures and initiatives.
- Be familiar with the SSIT and Stepping Stones Core Four (SSCF) tools to understand the effective use of the program.
- Identify a staff member to serve as the *Stepping Stones* lead for the school.

- Facilitate implementation through logistical planning. This could include scheduling time for the *Stepping Stones* lead to meet with teachers or grade-level teams, providing cover for teachers to observe a model lesson, and scheduling time for *Stepping Stones* professional development.
- Identify barriers to school-level implementation and problem-solve to offer solutions.
- Report any implementation barriers outside of the school's control to the DIT.
- Maintain the expectation that identified staff use *Stepping Stones* as intended (aligned to the district's expectations).
- Meet with the SIT at least monthly to monitor progress and plan implementation activities.

School Implementation Team

Building the School Implementation Team

The SIT is responsible for overseeing the day-to-day implementation of *Stepping Stones* at the school level. The team should have at least three members, but no more than five. These can include the principal, assistant principal, *Stepping Stones* lead, and math coach or lead teacher (if applicable).

The SIT's responsibilities

- Embed the implementation of *Stepping Stones* into the School Improvement Plan, specifically addressing mathematics-related goals and activities, as appropriate.
- Set goals for student outcomes and the implementation of *Stepping Stones* for the school year.
- Collaborate and communicate with the DIT to schedule implementation activities, such as school-level training and coaching opportunities.
- Use the SSIT to monitor implementation and plan for professional learning and coaching supports to improve implementation.
- Monitor and communicate the project's progress throughout the year.
- Communicate progress and any barriers to the implementation to the DIT.

Scheduling meetings

The SIT should meet at least monthly to review the project's progress. The team may choose to meet more often during the initial stage of implementation (for example, weekly or twice a month).

Stepping Stones Lead

Selecting the *Stepping Stones* lead

The *Stepping Stones* lead is chosen by the principal and is responsible for overseeing implementation of *Stepping Stones* at the school. This person should have a deep understanding of mathematics content and the SSIT, be able to provide professional development and coaching support to teachers, and have effective communication and collaboration skills. A math coach would be an ideal candidate for the *Stepping Stones* lead. For schools that do not have math coaches, principals should consider math specialists/resource teachers or lead teachers for the role. If a lead teacher is selected as the *Stepping Stones* lead, the principal should plan for substitute cover or informal release time to provide them with adequate time to support colleagues with implementing the program.

The *Stepping Stones* lead's responsibilities

The *Stepping Stones* lead is the primary communication link between the school and the DIT. They will also:

- Develop a plan to offer professional development for teachers throughout the school year.
- Work with teachers in a non-evaluative manner. The lead can support teachers in a variety of ways, including disseminating *Stepping Stones* resources, co-planning lessons, co-teaching, modeling *Stepping Stones* lessons, and observing teachers to provide constructive feedback.
- Report on the implementation's progress and barriers to the DIT through established communication loops.
- Participate in monthly SIT meetings.
- Collect data as requested by the SIT and/or DIT.
- Participate in *Stepping Stones* professional development.
- Conduct surveys to provide feedback to the DIT and ORIGO representatives.

Teachers

Selecting teachers (first implementers)

The district and/or principal chooses the teachers who will use the *Stepping Stones* program according to the guidance of the DIT. The DIT and/or principal can consider a variety of structures for selecting participating teachers. For example, a principal may select teachers across the same grade level, multiple teachers in each grade level, or one teacher per grade level. Principals can consult with the DIT when they are considering their selection. Teams should select teachers and/or grade levels based on a variety of factors but, ultimately, teachers and/or grade levels where successful implementation is most likely is a priority. Teachers who are resistant to change and the adoption of new practices will not be suitable as first implementers. Look for teachers who will work toward success and be able to share those stories and practices with others to support buy-in.

The teachers' responsibilities

The teachers are responsible for consistently using the *Stepping Stones* program, aligned to the DIT implementation plan, during math instruction. They also:

- Provide high-quality mathematics instruction that is aligned to best practices.
- Participate in *Stepping Stones* professional development.
- Are familiar with the SSIT.
- Collaborate with the *Stepping Stones* lead to plan and deliver instruction.
- Share student outcomes and implementation fidelity data with the principal, SIT, *Stepping Stones* lead, and DIT, as requested.
- Complete surveys to provide feedback to the DIT, SIT, *Stepping Stones* lead, and ORIGO representatives.

Section 3: Exploration

The Exploration stage often happens when selecting a math curriculum or resource at the district level, so this section primarily pertains to the DIT. During this stage, the DIT is appointed to oversee the work, assessing the district's needs and analyzing *ORIGO Stepping Stones 2.0* to ensure a suitable fit within existing initiatives. The team should also examine the district's capacity to implement the program as intended, including staffing and resources. Teams may use the NIRN's Hexagon Tool[3] (see Appendix 1), or a similar exploration aid, to assist with this discussion and analysis. The DIT should also develop methods to promote buy-in and support the use of *Stepping Stones* at the school level.

Goals for this stage

The leadership overseeing the *Stepping Stones* implementation should:

- Organize the DIT and schedule monthly meetings for the school year.
- Assess the district's needs and analyze the *Stepping Stones* program to ensure a suitable fit with existing resources and requirements, and capacity to implement.
- Develop methods to promote buy-in for using *Stepping Stones* for mathematics instruction.

Communicate early and often to promote buy-in

Clearly communicate any changes occurring before or early in the process. An open discussion about changes can have a significant impact on stakeholders' reactions to the information. Communication should include: Why the change is happening; how it will potentially affect schools, teachers, and students; and the key goals and objectives of implementing the *Stepping Stones* program. The DIT should establish and use a communication plan throughout the year to report on the implementation's progress and its success stories.

Get buy-in from the top down

As well as encouraging teachers' support, consider including principals and key district-level staff in the change plans early on. Gaining support for the project from leaders at different levels in the district will make it stronger. It will also ensure leaders have time to prepare for any questions about the process that could be asked by the *Stepping Stones* leads and participating teachers.

Share success stories

Change takes time, so not everyone will get on board at the same time. Identify early adopters, the teachers who are finding success with the program, and have them share their stories. Ask early adopters to present at district-wide professional development events. They can video their classroom instruction (with permission), or model lessons for teachers across other grade levels or at other schools. The more teachers share their positive *Stepping Stones* stories with other teachers, the better!

Get input along the way

It is important for teachers to know their feedback and ideas are valued and acknowledged. Ensure every implementation plan incorporates a process for gathering input from stakeholders (known as the communication and feedback loop). After collecting feedback, the DIT should decide how to use the data as they adjust their implementation plan. Be sure to share how the team used teacher feedback and what specific changes were made based on their input.

Section 4: Installation

NIRN research explains that the Installation stage focuses on developing the infrastructures that will support the implementation of the program or practice.[1] This includes planning for ongoing training, coaching, and supervision. During this stage, implementation plans are made and include forming teams, organizing regular meeting times and schedules, and planning the logistics of the project. Decisions made at this stage include funding, resources, personnel, and sustainability of the project. The activities recommended during this section primarily concern preparations at the district level.

Goals for this stage

The DIT/SIT overseeing the *Stepping Stones* implementation should:

- Acquire necessary resources.
- Define and communicate expectations and responsibilities to principals, *Stepping Stones* leads, and teachers.
- Create an implementation plan.
- Develop a communication plan to describe the *Stepping Stones* implementation process (for example, activities, participants, timeline, and benefits) to key stakeholders.
- Create an annual training plan, including professional development and coaching supports, for *Stepping Stones* leads and teachers.
- Develop methods to promote communication and networking across the participating schools.
- Develop a data collection plan, including student outcomes and implementation fidelity.

Resources for implementation

- Student Journals (printed; Grades K–6)
- *Slate* (digital Teacher Edition) or *QUICKsteps* (printed Teacher Edition)
- *The Number Case* (Grades K–6)
- *ORIGO Big Books* (Grades K–2; Tunes and teacher notes are on *Slate*)

Technology requirements:

- *Slate* login (direct or through single sign-on) for each teacher
- Current version of Chrome, Firefox, or Safari

The DIT's communication plan

The DIT should define the roles, responsibilities, and expectations of the implementing schools at one of the team's first meetings. This will also be an important step in the communication plan. As the team works to define the expectations, they should consider:

- What are the roles and responsibilities of the school staff, including the principals, *Stepping Stones* leads, and teachers?
- What data do we expect to collect from the schools throughout the year?
- What additional professional development are the schools expected to participate in?
- How should the teachers use the *Stepping Stones* program during mathematics instruction?
- Will the program scope and sequence be followed as intended, or will it be integrated into the current curriculum and pacing guide?

Components of a communication plan

A communication plan celebrates successes, clears any misunderstandings (overcomes barriers), and builds the collective commitment of a diverse range of stakeholders. A communication plan should include:

- **Mission and purpose —** What is the clear purpose and mission of the communication plan?
- **Information or messages —** What needs to be communicated? How does the information change over time as the implementation progresses?
- **Methods —** Are a variety of communication modes used (for example, presentations, meetings, websites, and emails)?
- **Responsibility —** Who is responsible for the implementation? What is the role of the leadership?
- **Communication and feedback loops —** Who is responsible for ensuring that feedback and information gathered through communications are used to inform practices, overcome barriers, and celebrate successes?
- **Audience —** Who should be included in communications? How do these communications change to best be understood by different audiences?
- **Frequency —** When and how often should the team communicate with stakeholders?
- **Indicator of success —** What data is used and how often is it analyzed to determine the effectiveness of our communication plan?

What should be included

The plan should include the team's vision for *Stepping Stones* implementation. As the DIT develops a vision statement, they should consider what a successful implementation would look like. The plan should also include the team members' names and roles, and a meeting schedule. Teams should also set an implementation goal for the school year. For example, consider assessing the percentage of participating teachers who use the program as intended, according to the SSIT. Teams should also think about other methods to measure implementation (for example, surveys, observations, teacher inteviews, and professional development evaluations). The implementation plan is also where the communication, training, coaching and data collection plans for the year can be documented. The *ORIGO Stepping Stones 2.0* Annual Implementation Plan Template (see Appendix 2) can support district and school teams as they develop implementation plans.

Annual training plan

An annual training plan should be developed for both the *Stepping Stones* leads and the teachers. Because the leads will be responsible for supporting the teachers, they will need more in-depth training to support the teachers in planning and delivering math instruction using the *Stepping Stones* program. The teachers will need initial training in *Stepping Stones*, but much of the follow-up training and support should happen through job-embedded professional development (coaching) at the schools by *Stepping Stones* leads and ORIGO representatives.

Data collection plan

The following should be considered when creating a data collection plan:

- What data can be used to measure student outcomes?
- What data can be used to measure the implementation of *Stepping Stones* at the school level?
- Will pre- and post-module assessment data for *Stepping Stones* be collected to measure progress?
- Who will be responsible for data collection?
- How often will data be collected? (At least twice per school year is encouraged.)

Section 5: Initial Implementation

Manage change and expectations, improvement cycles, learn from mistakes, and celebrate progress

This is the most challenging stage of any implementation because practitioners are introducing a new program while changing their usual way of working. Best practice is implemented in selected schools, and District and School Implementation Teams use a *Plan, Do, Study, Act* cycle to monitor progress and adjust the process along the way. The DIT and SIT has a critical role identifying barriers and seeking solutions to changes in practice, while improving implementation efforts. This section includes steps for teams to follow in the first year to ensure benchmarks are reached.

Benchmarks for the first month of school

- *Stepping Stones* leads provide coaching support to teachers as they begin using *Stepping Stones*.
- *Stepping Stones* leads focus on providing support to grade-level teams during scheduled team meeting time, and on working closely with early adopters.
- Survey teachers and *Stepping Stones* leads for feedback in preparation for *Stepping Stones* training sessions.
- Identify early adopters and success stories that can help encourage teacher buy-in.
- Refine data collection plan and use data to inform next steps.

Benchmarks for the school year

- Provide ongoing professional development and coaching with *Stepping Stones*.
- Provide opportunities for teachers and *Stepping Stones* leads from implementing schools to collaborate and communicate (for example, plan meetings or trainings with schools at the same place, date, and time, set up after-school virtual meetings, or create an online repository for resources and lesson sharing).
- Implement communication plans to inform stakeholders of launch dates and activities, and convey support.
- Develop communication protocols for identifying barriers and adaptive challenges, and for problem solving at each level (for example, use weekly or monthly team meetings or a shared spreadsheet to collect and identify reported issues, create plans, review results of past problem-solving efforts, and forward issues to the next level, as appropriate).
- Provide ongoing training and coaching to address teacher needs, based on implementation data.
- Collect implementation fidelity data using the SSIT (at least twice per year). The DIT/SIT and *Stepping Stones* leads use this data to plan professional development and coaching support for teachers and grade-level teams.
- Conduct surveys (at least twice per year) to collect feedback on successes and challenges from the initial implementation to improve the process for the following year.
- Revise the plan to prepare for full implementation.

Section 6: Data collection and analysis

Data collection and analysis are key components of the implementation process, ensuring its effectiveness. Data analysis allows the DIT and SIT to identify areas of concern, inform training and coaching efforts, and identify schools and/or teachers that are effective in their practice. It is important to understand that during the initial implementation stage, the primary focus for data analysis should be implementation data since it is unreasonable to expect changes in student outcomes while teachers are just beginning to use these new practices.

The data to analyze

Teams should analyze two types of data: student outcome data and implementation fidelity data. This should be done throughout the year to assess the project's progress.

Student outcome data

Examples of student outcome data include diagnostic assessments, district assessments, *Stepping Stones* pre- and post-module assessments, and state assessments. Teams should consider which type of student outcome data will be the most sensitive and show incremental progress. This will give the team a clearer idea of how the implementation of *Stepping Stones* affects student outcomes.

Implementation fidelity data can be collected through the use of the SSIT (see Appendix 3). The purpose of the SSIT is to provide DITs and/or SITs with an efficient measure of the extent to which school personnel are applying the core elements of the *Stepping Stones* program in classrooms. This tool is intended to be used over time to guide implementation planning of the *Stepping Stones* program. This tool is intended to be used not to evaluate teacher performance but to inform the actions of DITs and/or SITs. Teams complete the SSIT using a sampling of classrooms up to three times each year (fall/ winter/spring). The teams use the data collected to set and monitor annual and quarterly implementation goals.

Classroom walkthroughs can also be used by district and school leadership to collect implementation data. The *Stepping Stones* Core Four (SSCF) tool is a classroom walkthrough tool that district- and school-level teams use to measure the implementation of the core features of the *Stepping Stones* program in the classroom (see Appendix 4). While the SSIT provides a comprehensive picture of implementation levels and takes thoughtful planning to complete, the SSCF tool provides a quick snapshot of implementation through 15–20 minute classroom walkthroughs. It focuses on the four key components of *Stepping Stones* implementation that can be assessed during a classroom observation. Data gathered across a sampling of classrooms at a school and/or district can inform the professional development and coaching plans to support teachers with implementation.

It is important that the SSIT and SSCF tool are shared with school-level teams, *Stepping Stones* leads, and teachers to ensure all stakeholders understand the case for best-practice use. The DIT and SITs should consider other methods to measure the effectiveness of their implementation plan, such as *Stepping Stones* usage reports, and surveys.

Frequency of data analysis

Depending on the type of data, teams should analyze them on a monthly or quarterly basis. For example, teams should analyze formative data monthly to make in-the-moment adjustments to their implementation plan. Formative data could include surveys, professional development evaluations, and other types of qualitative feedback from the participating staff. Teams should collect and analyze student outcomes and implementation fidelity assessment data, such as the SSIT and SSCF tool, at least twice per year, but ideally three times per year: in the fall, winter, and late spring.

Using the data

Implementation fidelity data becomes extremely important during the initial implementation stage. It can be used to make immediate adjustments to the implementation plan, and inform professional development and coaching needs. Data should provide information on the effectiveness of the teams' implementation efforts, and not be used to evaluate teachers' performance.

In addition, the DIT and SITs may analyze the relationship between the implementation fidelity data and student outcomes data. For example, teams might ask, "Are students making more academic progress in classrooms with higher levels of implementation fidelity, according to the SSIT and/or SSCF tool?"

Section 7: Full implementation and scaling up

Monitor outcomes, improvement cycles, and sustainability

Full implementation is reached when 50 percent or more of the intended practitioners are using an evidence-based practice with fidelity[1]. During this stage, the *Stepping Stones* program is being routinely implemented. The teachers are comfortable with the materials and core components of the program, and few changes are made to ongoing practice. The implementation teams continue to support the practices to ensure processes are maintained and constantly improved, even during changes in leadership and staff.

Preparing for full implementation

Planning for full implementation should begin during the spring and continue through the summer of the initial implementation year. By using the data collected in the initial implementation stage, the DIT and SIT can make necessary adjustments to their plan for full implementation. The DIT and SITs can use The Planning for Full Implementation Guide (see Appendix 5), which can help them prepare for full implementation.

Key activities for full implementation

- Training for new users and booster training for experienced teachers are provided.
- Coaching infrastructure is improved and refined to provide more coaching support during the full implementation stage.
- Implementation fidelity data is collected, analyzed, and reported using the SSIT and SSCF tool.
- The DIT and/or SIT elicits feedback from teachers and uses that information for action planning (for example, administrative support and policies are changed to facilitate best practices).
- Improvement processes address issues, identify challenges, develop plans for improvement, monitor execution, and assess results (PDSA cycles) until improvement occurs or processes are fully embedded.

Expanding to other sites

The process is considered at *full implementation* when 50 percent of teachers are using the *Stepping Stones* program with 80 percent fidelity. The DIT and SITs will know when it is appropriate to include more schools, grade levels, and/or teachers when the expected practices are being used consistently as intended in the selected schools and teachers' classrooms. If practices are not being used consistently as intended, implementation efforts should continue into the next year until they are.

Section 8: Conclusion

The handbook is meant to be used by District and School Implementation Teams throughout the process. Change takes time and can be difficult. It is important for teams to anticipate challenges and leverage best practices in implementation research to assist the change process. It is essential that programs and practices are implemented as intended, since this will improve mathematics outcomes for all. Teams should focus as much on **what** they are implementing as on **how** they are implementing it to make a true difference for students and families.

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