Guidance on Pilots and Selection

This resource provides an overview of the different options for piloting materials, as well as the design considerations for pilots.

There are two primary purposes that can drive the decision to include a pilot as part of your process, either in Phase I - Select Great Materials or in Phase II - Prepare to Launch.

Pilot Purpose	When should you use this approach?
Phase I Pilot - Materials Selection: In this phase, the pilot is used to test multiple curriculum options to inform the Selection Team's decision about which materials to select.	▪ There are multiple options of materials available for selection that potentially meet the selection criteria and the pilot will be used to tease out the strengths and weaknesses of the options. ▪ You want to create early buy-in amongst a wider range of stakeholders by engaging them in the pilot process. ▪ There is a longer time frame for the decision-making process that allows for a more thorough selection process.
Phase II Pilot - Prepare for Effective Implementation: In this phase, the decision of which materials to select has already been made, and the purpose of the pilot is to prepare for an effective roll-out by piloting the materials to inform the overall implementation plan and iron out any kinks before a large-scale roll-out.	▪ A decision about which materials to select has already been made. ▪ You are working within a large system and want to develop capacity in a wider range of stakeholders who can then support the large-scale roll-out. ▪ There have been implementation challenges in the past when rolling out a new set of materials, and you want to prepare for an effective implementation process. ▪ There is a longer time frame between when a decision is made and when roll-out can occur.

For each pilot purpose, there are specific design considerations that make an effective pilot as well as potential pitfalls that can make the pilot approach challenging.

Pilot Design Considerations

Key Design Question	Considerations	Potential Pitfalls
What is the scope of the pilot?	There are several ways to approach the scope of the pilot: ▪ Unit Selection: In this approach, only 1-2 units are selected from the materials and used for the pilot. This allows for a shorter-term pilot as most units span 4-6 weeks of instruction. In a Phase I pilot, this also allows the same group of teachers to pilot multiple sets of materials to compare them to one another. ▪ Multiple Units or Full Year: In this approach, multiple units and/or a full year of curriculum is piloted. This is best utilized for a Phase II pilot when you are using the pilot to learn and prepare for full implementation.	Unit Selection ▪ It is important to be strategic about which unit is selected for the pilot. You'll want to refer to EdReports or the curriculum evaluation conducted to select a unit that is representative of the curriculum and is of high quality. ▪ The unit should also be selected to fit into the current scope of sequence of instruction where possible, so teachers can see how students respond to new content from the curriculum and you're continuing to make sure students are learning the "right stuff" in the school year. Multiple Units or Full Year ▪ Multiple units can be an effective strategy for a Phase II pilot because it provides you with more opportunities

		to learn about effective implementation. ▪ A full year approach lengthens the overall selection and implementation process, making this a multi-year effort from selection to full implementation. This can be helpful as it helps to build a coalition of stakeholders invested in the process, but there is a risk of losing momentum in the process and it takes longer to address core instructional challenges.
Who will pilot the materials?	You'll want to consider: ▪ Scale: How many teachers do you want to participate in the pilot? How does this fit into your broader educator engagement strategy? ▪ Selection: How will you select teachers to participate? Will teachers opt-in to the pilot or will they be chosen? What are the expectations for participation? How will you leverage teachers/leaders who hold informal authority within your system and can help influence others?	Scale ▪ Not involving teachers or leaders with informal authority who have the ability to influence other teachers or leaders and build their buy-in, or not involving teachers/leaders who may be harder to invest. ▪ Phase I - You want to find the balance between more stakeholder voice in the process with being able to meaningfully learn from the pilot to inform your decision. ▪ Phase II - It can be challenging to limit the pilot when there is greater

	- Individual teachers vs. teams: Do you want full teams to participate or just individual teachers? - Grade level span: Do you want to span a few grade levels? All grade levels? - Entire school: Is there one specific school that wants to pilot the materials for your system?	interest, but if you truly want to use the pilot to learn and prepare for an effective roll-out, it is important to keep the scale manageable, so you can closely study and monitor implementation to inform your broader roll-out. - Oftentimes, schools choose to pursue new materials after identifying a gap in current materials. If you choose to pilot materials in certain schools or grades (versus system-wide), this means that some students will not receive access to potentially higher quality materials. Consider ways to support teachers and leaders in strengthening current materials while piloting to ensure equity as much as possible. Teams, Individuals, Grade Levels - Having full teams or an entire school engage in a pilot enables you to study the impact on other structures or systems (i.e., PLCs, professional development, etc.). - If the materials being considered have different structures in different grade

		levels (i.e. K-2 materials are slightly different from 3-5, K-5 is different from 6-8, etc.), you want to be sure to pilot in each configuration.
What training or support will be provided to the teachers and/or leaders involved in the pilot?	While the pilot may be limited in scope, it is essential that teachers and leaders receive some training on the materials to prepare them for implementation. This should include: ▪ An overview of the design and architecture of the materials, including how units and lessons are structured and the scope of the year. ▪ The key instructional practices that may be employed within the curriculum. Additionally, providing training in the pilot can help illuminate future training needs should those materials be selected or if you are planning a broader roll-out. If you are piloting multiple sets of materials, teachers and leaders will need some brief training in each set of materials to ensure they implement the materials appropriately. This can also provide insight into the quality of training offered by different publishers, which can be a factor in your decision.	Many pilots tend to overlook the training needs teachers and leaders have when piloting new materials. ▪ Teachers can become frustrated without appropriate training because they are unsure of how to use the materials or are not using them effectively. This can lead to teachers having a poor experience with the materials and becoming disinvested in the options. ▪ Leaders may hear frustrations from their teachers and become disinvested in the materials and/or not know how to support teachers to work through the challenges that emerge. ▪ You may not get the outcomes you want from a pilot because perceptions of the materials are influenced by the training, or lack

		thereof, instead of by the materials themselves.
How will you evaluate the pilot to inform your process?	Setting clear evaluation criteria and/or having a plan for learning is an essential component of any pilot. In Phase I pilots, this includes: - The criteria by which each set of materials will be evaluated in alignment with the overall selection criteria. - The specific questions you aim to answer through the pilot about each set of materials; this could include questions about the training required, the instructional time required to implement, the impact on specific student populations (English Language Learners, students with IEPs, etc.). - A way to synthesize the learning from the pilot to inform the decision-making process. This is the most important component of Phase II pilot planning. You want to ensure that you consider the following to maximize the impact of the pilot:	In Phase I pilots, the potential pitfalls are: - Relying solely on the perceptions and opinions of the teachers who participated in the pilot without some objective criteria. - Looking to student achievement data to inform the decision. Most pilots are too short to have a measurable impact on student data and it will provide a false positive or false negative of the impact the materials may have. In Phase II pilots, the potential pitfalls are: - Not working through the challenges that emerge during the pilot and engaging in continuous improvement. There is a risk of viewing it as "just a pilot" and not investing the time and energy to work out challenges in real-time to find a strong solution and leverage the pilot. - Expecting measurable changes in student achievement data. The

	- The specific questions you aim to answer through the pilot. You should work through Phase II of the Curriculum Support Guide in order to test roll-out for assessment, pacing and planning, coaching, and training. - Clear roles/responsibilities and expectations for pilot implementation and for capturing and synthesizing learning. - A plan to monitor progress for the pilot, including specific times to synthesize learning aligned to each of the questions determined.	impact of materials on student learning can take time and looking for measurable impact can lead to a false positive or false negative of the potential impact of the materials. Not having a clear approach to synthesize and capture learning on a regular basis, so you are not able to apply the lessons learned to the full roll-out of materials.