CURRICULUM SUPPORT GUIDE

WORKBOOK

Key Action III.2: Step Back and Adjust the Plan

III.2: STEP BACK AND ADJUST THE PLAN

Phase III: Learn >	Key Action III.1: Work the Plan and Gather Data	Step III.2.A: Prepare Data for the Stepback
	Key Action III.2: Step Back and Adjust the Plan	Step III.2.B: Step Back to Reflect on Progress and Challenges
	Key Action III.3: Annually Reset	Step III.2.C: Adjust the Plan and Communicate the Changes

WHAT IS THE GOAL?

The goal of this key action is to examine progress to goals, identify key successes, and learn from and solve for significant challenges. After analyzing the data and considering key drivers, the team will adjust the plan for the next chapter of work.

WHY IS THIS KEY ACTION IMPORTANT?

While the team meets consistently during the year to monitor progress and keep the work moving forward, a formal stepback at a larger interval of time allows for deeper reflections and gives the team an opportunity to get out of the day-to-day challenges and take stock of overall progress to your goals. This is the time to look at the whole picture and decide what to do. Listening and adjusting builds investment and confidence, and it allows everyone involved to be more efficient in spending energy in ways that support progress.

EXPLANATION OF LANGUAGE

We use the word **stepback** as a noun to refer to the actual meeting that takes place with the Implementation Support Team and **step back** as a verb describing the collective act of gaining perspective on the whole story. We use the term **quarterly** to refer to the practice of doing these stepbacks each quarter, although we have seen some early implementers benefit from more frequency in the first three months. **Data** refers to quantifiable data (i.e. student scores or survey results) as well as qualitative data (i.e. observation notes).

III.2.A: PREPARE DATA FOR THE STEPBACK

GUIDING QUESTIONS

i.   What are the goals for the meeting?

ii. What data do we need to gather to report on our progress to goal?

iii. Is there additional stakeholder feedback we need to gather?

iv. What is our agenda? Who will facilitate which portions?

v.   What meeting norms do we need in place to create a productive, supportive, and solutions-oriented discussion?

vi. What pre-work, if any, will there be for the meeting?

vii. How will we communicate the agenda, goals, and pre-work?

NOTES

The resource Quarterly Stepback Agenda and Email is a sample agenda with an adaptable email that you can send. You can also use the sample Quarterly Stepback Data Gathering Template to collect all data and stakeholder feedback in one place. You can also reference the notes in the Implementation Observation Log you used in **Step III.1.B: See the work in action and listen to questions and concerns**.

Sharing and discussing data openly can be scary and trigger feelings of evaluation for team members, particularly when looking at data broken out by any subgroups (i.e. specific grade levels, schools, etc.). Setting team norms around meeting culture can help make the discussion more productive for the team. The resource Quarterly Stepback Meeting Norms includes some sample norms that you can use as a starting point.

Ensure you are disaggregating the data where possible to evaluate for equity. Are all student groups getting access to the same experience and expectations?

III.2.B: STEP BACK TO REFLECT ON PROGRESS AND CHALLENGES

GUIDING QUESTIONS

i.   Where are we on pace to meet our goals?

ii.   What are the drivers of success?

iii. How can we best celebrate these successes?

iv.   Where are we off track to meet our goals?

v.   What is holding us back from meeting those goals?

vi.   What are the 2-3 areas we want to improve in next quarter?

NOTES

Reference your agenda, sample norms, and templates for organizing data for the conversation that you laid out in **Step III.2.A: Prepare data for the stepback**.

If the results are clear about some areas for improvement, add additional guiding questions in advance to focus on the root cause and potential solutions for those areas.

While it's tempting to try to solve everything at once, it can be helpful to focus on 2-3 improvements and keep the rest on a running list for potential changes to revisit.

In the next key action, you will adjust your plan and determine what you are going to do in more precision.

III.2.B: STEP BACK TO REFLECT ON PROGRESS AND CHALLENGES (CONT.)

GUIDING QUESTIONS

vii. **For each of the 2-3 priorities, what is the root of the problem?**

viii. **What needs to change?**

ix. **What are we going to do about it?**

x. **At our next stepback meeting, how will we know that these adjustments worked?**

xi. **What do we need to observe and what additional data do we need to collect next quarter to know if it is working?**

NOTES

This step asks you to go back into your Implementation Plan to adjust the plan, as opposed to throwing the old plan out and starting from scratch.

The resource Examples of Mid-Year Adjustments is a set of examples of the kinds of adjustments that have been made mid-year towards different goal areas.

Leverage your bright spots and share learnings in your game plan.

III.2.C: ADJUST THE PLAN AND COMMUNICATE THE CHANGES

GUIDING QUESTIONS

i.   In this key action, we adjusted our plan. What are the next steps that we need to take based on the decisions we made together?

ii. What needs to happen? Who will do it? By when?

iii. What will each identified stakeholder group want to know about the adjustments to the plan?

iv. How do we plan to proactively communicate this information? Who will deliver the communication? When?

v.   What questions do we expect we will get? How will we answer them?

NOTES

Go back to your Implementation Plan to track your next steps and add to your roles and responsibilities tracker.

Quarterly communications can be a great opportunity to celebrate the hard work of implementation and fuel the fire to keep continuously improving.

Listening and adjusting the plan builds confidence and trust, especially when every member of the team is on the same page and can describe the rationale in a way that is connected with the vision and core beliefs.

The Email Communicating Adjustments After a Stepback resource is a sample email from a system based on the adjustments they made.

Quarterly Stepback Agenda and Email

This resource provides goals, a sample agenda, and a sample email for a Quarterly Stepback Meeting.

Curriculum Support Quarterly Stepback Meeting Agenda
Month Day, Year
Meeting Time

Goals:
- Use data to build a shared understanding of the successes and challenges of curriculum support in the last quarter
- Identify drivers of successes and challenges
- Use successes, challenges, and drivers to plan support for the upcoming quarter

Agenda:

Time	Session

15 min.	**Welcome and Opening**
	• Goals and agenda review
	• Review norms for the group
	• Opening round:
	    • What is the most exciting thing you have seen in curriculum support in the last few weeks?
	    • What are you worried about?

30 min.	**Data Review** • Compile and share data from various stakeholder groups including observations, teacher feedback, principal feedback, etc.

30 min.	**Synthesize Successes and Challenges**
	• Discuss and chart the questions below:
	    • Based on the data shared and your experiences, what have been the successes in curriculum support over the last quarter?
	    • Based on the data shared and your experiences, what have been the challenges in curriculum support over the last quarter?

30 min.	**Identify Drivers of Trends in Successes and Challenges** • Discuss and chart the questions below: • When we look at the areas of success, what was the driver (practices, resources, process, etc.) for each one?

	• When we look at the areas of challenges, what was the driver (practices, resources, process, etc.) for each one?
45 min.	**Planning for Next Quarter** • Choose which challenges to focus on in support next quarter • Review and adjust implementation plan for the next quarter with an eye toward addressing the identified challenges
15 min.	**Closing and Reviewing Next Steps**

Sample email to send to Quarterly Stepback participants

Hi team,

I'm excited to see you all next week for our Quarterly Stepback meeting! Please remember to bring any notes or data on challenges and successes to inform our discussion. The agenda and goals for our time together is attached. Please let me know if you have any questions. In preparation for the meeting, please review the agenda and jot down notes and reflections around the "Synthesize Successes and Challenges" section.

Best,

Attachment: Agenda

Quarterly Stepback Data Gathering Template

This resource provides a template for organizing data and feedback for quarterly stepbacks.

System Level Results

Goal Area	Goal/Measures	Q1 Results	Q2 Results	Q3 Results	Q4 Results
Teacher and Student Investment					
Teacher Practice					
Student Outcomes					

School Level Results

Goal Area	Goal/Measures	System Results	School A	School B	School C	School D
Teacher and Student Investment						
Teacher Practice						
Student Outcomes						

Teacher and Student Investment - School and System Breakdown

Survey Question	System	School A	School B	School C	School D

Teacher Practice

Indicator on Walkthrough Tool	System	School A	School B	School C	School D

Student Outcomes

Assessment	System	School A	School B	School C	School D

Implementation Observation Log								
This resource has four tabs for organizing notes on implementation observation: Tab 1: Log notes from classroom observations Tab 2: Log notes from meeting observations Tab 3: Log survey results and feedback Tab 4: Log informal notes from conversations								
Date	Teacher Name	Leader Name	<Insert Implementation Look-for>	Evidence/Notes	<Insert Implementation Look-for>	Evidence/Notes	<Insert Implementation Look-for>	Evidence/Notes

Date	What did you observe? (common planning, coaching, training, etc)	Teacher(s) Name(s)	Leader Name	Notes from Observation

Date	Teacher Name	<Insert Survey Question>	<Insert Survey Question>	<Insert Survey Question>	<Insert Survey Question>	<Insert Survey Question>

Date	Teacher Name	Leader Name	Notes from Conversation

Quarterly Stepback Meeting Norms

This resource provides sample meeting norms. Setting norms are essential for discussing data and productive meetings.

- Assume positive intentions.

- Take responsibility for yourself as a learner and contributor.

- Actively listen to each other's ideas and opinions.

- Ask questions to clarify and understand.

- Strive for equity of voice. (**UnboundEd**, 2019)

- Identify and reframe deficit thinking and speaking.   (**UnboundEd**, 2019)

- Use multiple points of data and evidence to make informed decisions.

Implementation Plan

This resource is a template for keeping track of all of the projects and tasks that your team will take on during implementation. Before the work plan, there is space for recording major decisions and notes relevant to your work plan from across Phase I and Phase II: vision, core beliefs, goals, communications, roles and responsibilities, and decision-making process. This is meant to be a "one-stop shop," but the format may not be right for your team. Modify as needed - add or delete sections, adjust tables and rows, or separate into multiple templates.

Vision (set in Establish the vision, Phase I, Key Action 2, Step B):

Core Beliefs (set in Establish the vision, Phase I, Key Action 2, Step B):

Goals (set in Set goals, roles, and monitoring plan, Phase II, Key Action 1, Step C):

Goal Area	Goal(s)	Measures and Frequency	How will we collect and analyze data?	When will we step back and adjust?
Teacher and Student Investment				
Teacher Practice				
Student Outcomes				

Key Stakeholders and Communications (set at the end of each step in Phase II):

Stakeholder Group	Communication Channels	Communications Needed

Roles and Responsibilities (set in Set goals, roles, and monitoring plan, Phase II, Key Action 1, Step E):

Person / Role	Responsibilities	Training and Support Needs

Decision-Making (set in Set goals, roles, and monitoring plan, Phase II, Key Action 1, Step E):

Key Decision	Who is responsible for making it?	Who will consult?

Progress Monitoring (set in Set goals, roles, and monitoring plan, Phase II, Key Action 1, Step D):

Goal	Progress Monitoring Action(s) to be Taken	Owner	Date	Outcome

Work Plan: Below are descriptions of some of the terms across the top row.
- Project: describes the bucket of work; many organize projects by key action (i.e. coaching)
- Task: describes an action step in the project (i.e. determine who will lead upfront materials training)

Project	Task	Owner	Deadline

Examples of Mid-Year Adjustments

This resource provides examples of mid-year adjustments a system might make when implementing new materials. This can help give you an idea for how to make changes to improve implementation during the school year.

Example 1
Data from teacher surveys, as well as informal conversations with teachers at different schools, revealed that teachers wanted more opportunities to collaborate with one another. They specifically wanted to know the kinds of modifications other teachers were making to the curriculum and how those modifications were supporting specific groups of students, like English learners and students who were advanced or gifted in math. Teachers wanted to be able to learn from teachers in other schools, not just their own.

In response, the system's instructional coaches got together and created a series of online documents where teachers could post and share ideas. They created an online folder for each grade level and within each folder was a page for each of the curriculum's units. They made a simple template for each page where teachers could indicate which lesson they modified, what they changed, and what the results were. As much as they could, the coaches populated the pages with information based on examples of strong modifications they'd seen in classrooms.

Coaches shared information about the online pages with teachers. They reminded teachers that everyone was in a slightly different place with their pacing and teachers might be able to get ideas for future lessons from teachers who were slightly ahead in the pacing. Coaches also encouraged all teachers to log their modifications, so they would have a record of changes that they could reference the next year.

Example 2
System leaders set up a focus group for teachers and principals because they wanted help brainstorming more ideas for how they could support teachers in using the Eureka math curriculum. One theme that came out of the meeting was that teachers were working really hard, but the goals they were working toward felt really far away. Leaders brainstormed ways to provide ongoing encouragement and recognition to teachers. They came up with a Eureka Teacher of the Month award. Coaches submitted the names of teachers who had made improvements, met a goal, supported another teacher, or shared a helpful resource. System leaders printed certificates for these teachers and posted an announcement on the school website. Leaders urged coaches to submit the names of teachers who were finding creative ways to address challenges with the curriculum, not just those who were teaching it well.

Example 3

At the beginning of the first year with the curriculum, system leaders set the expectation that teachers fill out a lesson planning template aligned to the new curriculum. Leaders thought that filling out the template would support teachers in preparing for lessons by prompting them to review and describe each component of the lesson. While teachers took preparing for lessons seriously, many began complaining that filling in the lesson template was a waste of time. All the information required by the template was already supplied in the teacher's guide, and teachers reported feeling like they were just "copy and pasting". Many teachers felt that completing the lesson template was busy work that actually took away from the time they wanted to spend preparing to teach.

In response to this feedback, system leaders – with further input from teachers – adjusted their expectations for lesson preparation. The new expectation was that teachers would annotate their teacher's guides, noting where they might need to ask an additional question, model an extra example, extend an idea, or switch up the sequence of problems. Additionally, teachers were expected to show their work for all tasks in the lesson and note places where student misconceptions might crop up.

Email Communicating Adjustments After a Stepback

This resource provides a sample email from a school leader to their staff explaining the key takeaways and changes from a quarterly stepback meeting.

Dear Educators,

Our Curriculum Leadership Team met recently for our first quarterly stepback meeting. The purpose of these meetings is to look at data together, celebrate the successes we're seeing with the curriculum, and respond to the challenges we also know are there. We look at data from classroom observations and surveys and also all the feedback we've heard from you in planning meetings and hallway conversations. In this email, we want to share what we talked about at our recent meeting and the specific steps we're taking to better support you and your students in learning with the new curriculum.

What did we learn from data and feedback?
First, we learned that all of you are working very, very hard! Teachers are studying the curriculum during planning meetings and making sure students get to the meat of each lesson. And, students are working hard too. More and more students are finishing problem sets and demonstrating their understanding on exit tickets. While only a third of students earned a proficient score on the most recent end-of-module assessment, we feel good that student learning is moving in the right direction, and it's because of your hard work!

Second, we learned that timing and pacing are still a challenge. The curriculum has a lot of content to get through and some of us are still figuring out how to make sure students get to the application part of the lesson before the math block ends. The computational fluency part of the lessons, in particular, is taking a lot of time, especially for students who have skill gaps and struggle with basic computations.

What did we celebrate?
We celebrated the creative solutions you all have come up with to support your use of the curriculum. Specifically, we want to highlight how the third-grade team has responded to the challenge of pacing and making sure they get to the heart of each lesson. Here is a tip from Ashley, the third-grade team leader:

"All of us in third grade found that we were having a hard time getting through lessons. There were just so many problems to do in the problem set. So, during our collaborative planning meeting we started looking at lessons together and labeling the different problems in the set. We labeled them "must do" or "may do". We made sure the "must do" problems included some easier problems that scaffolded kids' learning and also made sure there were enough of the more challenging problems

that reflected the rigor of the standards. We tell kids the "must do" problems and focus our attention and feedback on those. This strategy has made the practice section of our lessons more purposeful and efficient."

Ashley noted that at first the team used planning time to label problems together, and that it took a while. But, after some practice, they felt confident organizing problems on their own and now use their planning meeting for other forms of collaborative support.

We encourage all grade level teams to label "must do" problems in the practice set as one strategy for making math lessons more purposeful.

What actions will we take to improve?
We learned through our observations and through your surveys and feedback that the fluency part of the lesson is a challenge. There are lots of different routines to figure out, and many of our students still struggle with basic computational skills. We're seeing lots of teachers stopping to help students with these skills, which can then delay the rest of the lesson. We want to respond to these challenges in a few ways.

First, we want to reiterate the purpose of the fluency section. Students get a little practice with important computational skills each day, and this daily practice will lead to improved computation over time. It's okay if students make mistakes because they'll get many more chances to practice! Please don't feel like you have to stop and correct each mistake every day. The curriculum is designed to spiral skills, and we can also use our judgment as educators to spiral the skills we know our students need. If you're getting stuck in the fluency section, please remind yourselves that students will get more practice another day and try to move on.

We are also committed to taking these action steps:
- Over the next two weeks, our coaches will prioritize observing during the fluency part of math lessons. Coaches will compile the successful strategies they see and will share them with all teachers.
- During these observations, coaches will also record videos of teachers who have made progress with fluency. Teachers can watch these videos and get tips for how to quickly execute fluency procedures and keep the lesson on pace.
- Coaches and grade level team leaders will work together to prioritize fluency during planning meetings over the next month. Specifically, they will plan time to walk through the fluency section of an upcoming lesson and have teachers rehearse it together. These rehearsals will provide opportunities for teachers to share valuable feedback with one another.

If you have any questions about our stepback meeting or about these action steps, please don't hesitate to ask! We thank you for the hard work you're putting into the new curriculum and we're excited to see even more progress next quarter.

Sincerely,
The Curriculum Leadership Team
Principal name
Coach name
Grade level team leader names

About Us

The Curriculum Support Guide was written and designed by Instruction Partners, an education non-profit that works shoulder to shoulder with educators to support great teaching and accelerate student learning. Our work with schools and systems is grounded in the instructional core, and we provide coaching, action planning, and professional development. In the last three years, we have observed hundreds of classrooms and been fortunate to partner with many schools and school systems. We specialize in supporting smaller school systems, who may lack capacity but are able to make big changes quickly.

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Thank You

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