



California Teachers Association  
 Evaluation of the Quality Education Investment Act

**BOARD OF DIRECTORS SUMMARY**

In 2007, CTA contracted with Vital Research to conduct an ongoing process and outcome evaluation of QEIA to:

- Understand the extent to which schools are planning for and implementing the program;
- Provide formative feedback that can be used to assist schools that are struggling;
- Explain why and how QEIA works in successful schools so that it can be replicated in others;
- For schools that struggled, explain the factors that inhibited positive outcomes (e.g., poor implementation, leadership, turnover, etc.);
- Examine a variety of indicators of success such as school performance, school culture, and graduation rates to determine the impact of QEIA; and
- Document CTA’s role in QEIA.

To this end, Vital Research designed a comprehensive evaluation approach, incorporating the collection of both quantitative and qualitative data. The evaluation design includes four phases (See Figure 1):

Figure 1. Evaluation Phases

Phase	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7
Phase 1: Planning Year							
Phase 2: QEIA Implementation & Impact							
Phase 3: Intensive Case Studies							
Phase 4: CTA’s Role							

*Phase 1* of the evaluation focuses on the planning year for schools (Year 1) and involves examining school readiness for program implementation, documenting the planning activities and processes for schools, and gathering baseline data for analysis in subsequent years. *Phase 2* of the evaluation occurs in Years 2-7 of the program and will investigate the extent of program implementation, challenges to implementation, and the impact of QEIA on participating schools. Additionally, in Years 2-7, outcomes for QEIA schools (e.g., test scores, graduation rates, etc.) will be compared to the outcomes for unfunded, similar schools. *Phase 3* of the evaluation will occur in Years 4 and 5, and

will involve intensive case studies of high performing and low performing QEIA schools in order to learn about the factors that contribute and inhibit success as well as specific implementation activities and processes. Data from Phase 3 will be used to uncover best practices that can be used by other low performing schools in the state. Finally, Phase 4 occurs throughout the evaluation and documents the QEIA-related activities of CTA along with the impact of those activities on the organization.

This narrative report provides findings from both Phase 1 and Phase 4 of the evaluation. Numerous data sources were used, including:

- Surveys of all CTA members on file in QEIA schools;
- Surveys of all principals in QEIA schools;
- Surveys of all CTA local presidents representing QEIA schools;
- Surveys of all CTA field staff working with QEIA schools;
- Interviews with key regional, department, cabinet, and Board stakeholders;
- Observations of CTA meetings, events, and trainings;
- QEIA-related documents (e.g., CTA meeting minutes, technical assistance documents, training materials, Web site materials); and
- Publicly available data from the California Department of Education (CDE).

### **Participating Schools**

The 488 QEIA schools served nearly 500,000 students in 2007-2008. The majority of students served in QEIA schools were Latino/Hispanic; 85% of students qualified for free/reduced lunch, and 48.2% were English learners. Nearly all funded schools are either in program improvement for 2008-2009 (83.8%), just exited program improvement (1.8%), or are at risk for program improvement in 2009-2010 (7.2%). Over 90% of classes taught in QEIA schools are taught by NCLB-Compliant teachers; over 70% of schools report having 91%-100% of their teachers fully certified.

### **The Role of CTA in QEIA**

CTA engaged in a variety of activities related to QEIA this year. Activities included:

- *Strategic Planning and Organization:* The QEIA Workgroup, comprised of representatives from all CTA departments and regions, including field staff, chapter presidents, and board members, met every 2-3 months and was charged with the primary responsibility of overseeing QEIA activities. Additionally, IPD organized a two-day forum on QEIA in April 2008 with representatives across CTA to engage in a strategic planning process designed to generate ideas for supporting QEIA.
- *Collective Bargaining:* A majority of field staff and presidents surveyed indicated that no changes had been made to collective bargaining agreements in the districts they represented. However, both field staff and presidents noted that

several unresolved bargaining issues exist that can affect QEIA schools: the additional workload for staff due to increased meetings, trainings, and professional development; involuntary transfers and reassignment; building in collaborative work time for teachers; reducing class sizes; and compensation and incentives.

- *Information Dissemination:* CTA disseminated a variety of information to QEIA schools and others through:
  - Printed and online publications;
  - School visits by board members;
  - Regional meetings and networking;
  - Trainings and events (see below); and
  - Local association support activities (see below).
- *Training:* The IPD department, in collaboration with the QEIA Workgroup, organized four training events in 2007 and 2008 for QEIA schools, including: 1) 2007 Summer Institute IPD Strand on QEIA; 2) 2008 Summer Institute IPD Strand on QEIA; 3) 2007 Regional QEIA Briefings; and 4) 2008 Site Contact Briefings.
- *Local Association Support:* Overall, 137 presidents and 94 field staff were affiliated with QEIA schools this year and offered various types of support. A majority of presidents and field staff surveyed attended CTA meetings related to QEIA and disseminated information to QEIA schools.
- *Monitoring & Advocacy:* CTA created an incident report form that has been disseminated throughout the organization to report schools or districts that are out of compliance with QEIA. The majority of incidents reported this last year dealt with QEIA funding, including the freezing of funds, QEIA money being “swept back” to the general fund, and the misallocation of funds. Other incidents involved poor principal leadership, lack of local control, violations of the class size reduction and professional development requirements, and the school site plan.
- *Brokering Resources:* CTA organized three meetings with professional development providers to learn more about what is needed to make professional development more effective, to investigate how CTA might collaborate with professional development providers, and to help schools make informed decisions about their use of professional development resources.

## Participating Schools

- *Knowledge and Awareness:* A majority of members were aware of QEIA before receiving the survey, and a majority knew about class size reduction and that school plans should be based on needs assessments. Several members did not know that school site councils have increased financial flexibility and are

responsible for QEIA. Moreover, many members were unaware of the professional development provisions associated with the law. Overall, principals surveyed were extremely knowledgeable about QEIA and its provisions. However, many principals were unaware that school site councils have increased flexibility due to QEIA.

- *Community Involvement and Support:* In general, members did not report a great deal of involvement from teachers, students, parents, and community members in the development of school plans. Principals surveyed reported having a fair amount of support from the community for implementing QEIA. However, they reported the least amount of support from students, the community, and parents.
- *School Site Councils:* According to member ratings, few school site councils were characterized as having a great deal of influence on school decisions. Most principals surveyed indicated that their school site councils had participated in at least 2 hours of training over the last year; the most common training topic was QEIA. Most school councils met at least 6 times per year and were comprised of school administrators, teachers, parents, and classified personnel.

## **Key Successes**

Finally, although there were several challenges, CTA stakeholders also experienced many successes related to work with QEIA, including:

- Successfully advocating for QEIA legislation and educational reform;
- Preserving the legislation during the state budget crisis;
- Being the only organization on the front lines working with schools and districts and funding evaluation activities;
- Providing many successful training opportunities for participating schools;
- Dedicating a full-time staff person to work on QEIA; and
- Planning and executing the spring forum with CTA stakeholders throughout the organization.

## **Key Challenges in Schools**

The most common challenges for schools mentioned by principals, presidents, leaders, and CTA staff were:

- Awareness of QEIA and knowledge about all the requirements and provisions;
- Accessing the “Essential Elements” for Class Size Reduction such as highly qualified teachers and school facilities;
- School Site Council Effectiveness (e.g., authority, consensus-building, decision-making, meetings, etc.)
- Teacher Involvement in QEIA (e.g., time constraints, lack of empowerment);

- Teacher Morale;
- Commitment from Stakeholders (including parents, students, and community members) ;
- Effective Principal Leadership;
- District Relations (e.g., balance of local control and technical assistance); and
- Fiscal Accountability and Funding Issues.

## **Key Challenges for CTA**

CTA faced several challenges this year, including:

- Doing something new and different;
- Thinking and planning long-term for the effort;
- Human and fiscal capacity;
- Balancing and communicating priorities;
- Integrating the work of QEIA throughout the organization;
- Reaching into schools locally; and
- Commitment to the effort.

## **Potential Directions**

Many of the challenges faced by both CTA and participating schools are typical challenges faced by organizations during start-up phases of new endeavors and programs – planning the effort, generating commitment, finding resources, building awareness, and coordinating and integrating the roles of stakeholders. Moreover, involvement in a reform such as QEIA breaks new ground for the organization, involves new activities and roles, and requires ample coordination and integration throughout the organization and across departments. In many ways, CTA is “building the plane while flying it.” As the organization moves forward beyond the start-up phase of QEIA, CTA may want to consider the following suggestions based on evaluation findings and the thoughts of evaluation participants:

1. Develop a long-term action plan for CTA’s involvement in QEIA , which includes the following:
  - A definition of success for both participating schools and CTA’s involvement. Such definitions will help to frame the work of CTA and enable stakeholders to more effectively plan and implement activities connected to what the organization hopes to achieve. How will CTA know it is successful on the local level? How will CTA know it is successful as an organization trying to become more actively involved in educational reform?
  - A long-range plan that describes the specific activities CTA would like to engage in related to QEIA (e.g., training, bargaining, advocacy, etc.), the departments and or/stakeholders responsible for carrying out those activities, how those departments and stakeholders should work together, the

- human and fiscal resources allocated to such activities, and the measured objectives of activities (e.g., number of schools participating in training, etc.).
- Procedures for evaluating and modifying the plan as needed. The action plan should be flexible and revisited periodically to ensure it continues to meet the emerging and changing needs of schools and the organization.
2. Determine and communicate the importance of QEIA and how it fits within the rest of CTA's work. Many acknowledge that CTA is clearly committed to QEIA, has a stake in its outcome, and wants the reform to succeed. However, one of the findings from this evaluation is that some CTA stakeholders feel that they do not have the time or resources necessary to be effectively involved in QEIA or do not understand their roles within QEIA. It is essential that stakeholders understand the importance of QEIA and how it advances the goals and mission of CTA. The importance of QEIA can be communicated in a number of ways, including:
    - Messages about the importance of QEIA from CTA leadership, which include the roles, responsibilities, and activities for board members, leaders and staff; and
    - Dedicated resources to departments and regions for activities related to QEIA.
  3. Continue efforts to integrate QEIA into the work of the organization and collaborate across departments to enhance QEIA implementation. Although the Workgroup has representatives from CTA departments, regions, and leadership, a few evaluation participants acknowledged that QEIA is largely seen as the work of IPD. The nature of the reform suggests that CTA and participating schools would benefit greatly from having more active participation from multiple departments. For example, the reform intends to incorporate broad stakeholder involvement in local school reform; community organizers at CTA have a great deal to offer here. An overwhelming number of students served are students of color and qualify for free/reduced lunch; Human Rights could play a significant role in working directly with schools. The suggested long-term action plan could prove particularly useful in helping to specify the expected activities and roles of departments and stakeholders.
  4. Continuing communicating broadly about QEIA and CTA's involvement in the reform. As noted in this report, there are CTA stakeholders and external stakeholders who would have preferred an alternative settlement. Moreover, according to evaluation participants, CTA wants to send the message that it is interested in more than just "bread and butter" union issues. A campaign to communicate the importance of QEIA, its potential benefits, and CTA's interest in reform may help influence internal and external perceptions.
  5. Work closely with school districts. Evaluation participants clearly identified a need to monitor schools and districts to ensure that they are implementing the legislation and allocating funds appropriately. At the same time, respondents also identified a

need to educate districts and collaborate with them to more effectively help schools. It will be important to strike the right balance between monitoring and support so that CTA is not perceived as an adversary, but rather a valuable partner.

6. Expand training activities. Trainings were perceived as particularly successful by evaluation respondents; however, not all schools have been able to be served. Consider expanding the Summer Institute to include more schools. Respondents also suggested developing more local and regional training possibilities. Additionally, it might be helpful to conduct follow-up evaluations of trainings to understand the extent to which learnings are being used by participants to change practice.
7. Continue efforts to reach directly into schools by training school site councils, organizing members, and building networks across schools. Such activities will enable CTA to have more of a local presence with respect to QEIA but also build the capacity of individual schools and members to respond effectively to QEIA.
8. Launch targeted information campaigns to address some of the knowledge gaps that may exist. From the surveys, it was evident that members know little about their role in QEIA, and principals do not understand the roles of school site councils. Additionally, field staff and leaders may benefit from information about collective bargaining related to QEIA. The resource handbook provided to site contacts is an excellent start to informing schools. The handbook and other resources should be disseminated broadly – possibly online – so that a larger community can benefit.