

Bringing an Implementation Science Lens to Program Transformation:

Stakeholders' Perceptions of US PREP's Technical Assistance for Cohort Two Sites

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Introduction

In 2015, the Bill and Melinda Gates Foundation (“the Foundation”) awarded Texas Tech University a grant to fund the University-School Partnerships for the Renewal of Educator Preparation (US PREP). The goal of the initial grant, part of a \$34 million investment in five teacher preparation Transformation Centers, was to support the development, implementation, and scale-up of sustainable, high-quality teacher preparation programs (TPPs).

To help US PREP and the Foundation evaluate the implementation, progress, and impact of US PREP’s technical assistance, in the fall of 2018, the Foundation awarded a four-year grant to the Education Policy Initiative at Carolina (EPIC) at the University of North Carolina at Chapel Hill. As part of this work, EPIC conducted two-day site visits in late 2019 and early 2020 with institutions in US PREP’s inaugural and second cohorts. Each visit included interviews and focus groups with key stakeholders, including TPP leaders, faculty, Site Coordinators, teacher candidates, graduates, and K-12 district personnel. The purpose of the site visits was to better understand stakeholders’ perceptions of the implementation and impact of US PREP technical assistance on TPPs’ transformation process. In addition to the site visits, EPIC conducted virtual interviews with US PREP personnel, including the leadership team, Regional Transformation Specialists, and Clinical Coaches to document the internal processes, goals, and systems of the organization.

Grounded in this trove of interview and focus group data, the current report takes a retrospective look at US PREP’s engagement with seven Cohort 2 institutions and highlights common themes, challenges, and impacts in program transformation. Likewise, the report considers ways in which US PREP has evolved its technical assistance between Cohorts 1 and 2. To assess US PREP’s technical assistance and its impact on TPP transformation, EPIC applied to its analysis and reporting a conceptual model grounded in implementation science and school improvement.¹ Specifically, EPIC adapted an implementation framework for K-12 school improvement to identify key drivers of program transformation and to assess how US PREP, as the primary implementation team, guides TPPs through the four stages of implementation: Exploration, Installation, Initial Implementation, and Full Implementation.

Framing US PREP’s technical assistance within implementation science is an important contribution of this work, especially given the critical role of systematized and purposeful implementation practices in the scaling and sustainability of TPP transformation.

The following executive summary shares the major findings from EPIC’s analyses of stakeholder perceptions. Concluding the summary are EPIC’s recommendations for US PREP’s ongoing work with current and future coalition members.

¹ Jackson, K. R., Fixsen, D., & Ward, C. (2018). *Four domains for rapid school improvement*. National Implementation Research Network University of North Carolina at Chapel Hill. Retrieved from <https://files.eric.ed.gov/fulltext/ED583980.pdf>

Findings

EPIC conducted its site visits to Cohort 2 institutions early on in their engagement with US PREP. This timing allowed EPIC to focus on early implementation stages—Exploration and Installation—and TPPs’ initial piloting of the transformed residency model. Furthermore, this timing allowed for a detailed analysis of US PREP’s technical assistance during their early engagement with TPPs, when laying a strong foundation is essential to scaled and sustainable transformation. From these site visits, EPIC identified a set of key findings, both successes and challenges, regarding US PREP’s engagement with Cohort 2 institutions.

Strengths and Drivers

- Participants across Cohort 2 sites appreciated US PREP’s efforts to strengthen their data systems and data use practices and reported that shared data was a tool to motivate further faculty involvement in transformation work.
- Across Cohort 2 sites, university and K-12 stakeholders reported that engagement with US PREP provided structures (e.g. governance) to strengthen program and K-12 partnerships and to build a sense of collective responsibility for teacher preparation.
- Although early in their engagement with US PREP, Cohort 2 stakeholders reported that reformed residency experiences positively influence candidates’ growth and readiness.
- Participants across Cohort 2 sites perceive their Regional Transformation Specialist to be responsive, resourceful, visible to a range of partners, and as an advocate for the work.
- When comparing the experiences of Cohort 1 versus Cohort 2 institutions, evidence indicates that US PREP evolved as an organization to (1) engage in earlier and more structured conversations with programs about scale up and sustainability and (2) allow greater model flexibility to meet the needs and contexts of coalition members. While this flexibility aids program/faculty buy-in, it is important to note that it also comes with challenges—i.e. identifying model components that are flexible versus non-negotiable and communicating that to programs.

Barriers and Areas for Growth

- As with Cohort 1 stakeholders, Cohort 2 participants reported challenges with effective communication—between US PREP and institutions, within institutions, between institutions and K-12 partners—that impede understanding of and buy-in for the transformation work. Communication challenges were sometimes impacted by the make-up of application teams and whether the transformation work was tightly held by a small number of leadership/faculty or more widely shared throughout the institution.
- Some Cohort 2 participants expressed that during early stages of engagement, US PREP needed a deeper understanding of their institutional context—i.e. other initiatives, institutional priorities and strengths—to better inform transformation efforts.

Recommendations

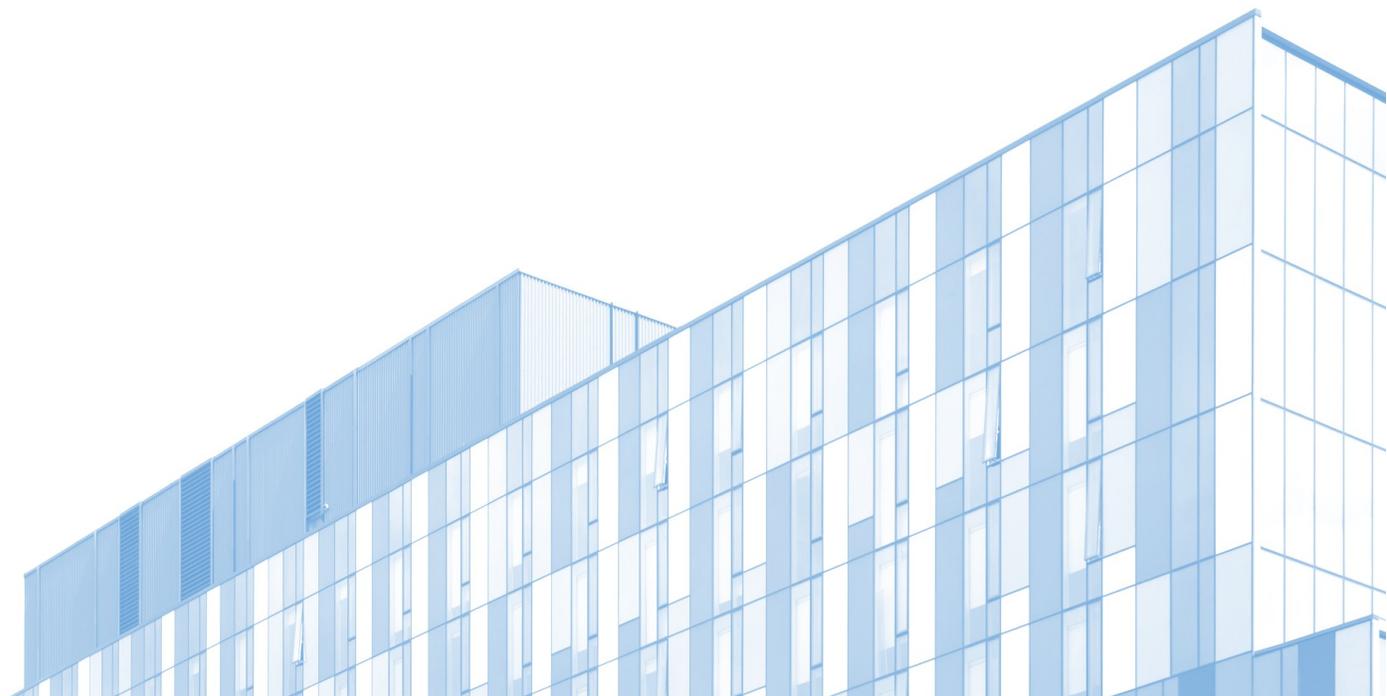
The Exploration and Installation stages are critical to building a strong foundation that supports transformation success. Findings from the Exploration and Installation stages for Cohort 2 indicate that there is a need for US PREP to fully establish readiness for change through extensive vetting and research, more inclusive representation in application and interview teams, and more comprehensive communication plans. Below, we further specify our recommendations for US PREP.

- Adopt a culturally responsive and equitable evaluation lens. This involves understanding and recognizing institutional context; being responsive to the needs and perspectives of stakeholders; engaging in frequent self-examination of values, biases, and assumptions that may influence transformation work; recognizing and addressing the dynamics of power, privilege, and equity; and including shared life experiences within the transformation work. For US PREP, this could mean a longer Exploration stage wherein US PREP leaders encourage institutions to recruit a diverse set of stakeholders to share TPP histories, norms, demographics, and specific interests, needs, and assets.
- Building from a culturally responsive and equitable evaluation lens, we also recommend that US PREP:
- Support institutions in building a broader team of stakeholders in early application and interviewing stages. We recognize the logistical challenges in including a larger number of partners. However, broadening representation provides greater insight into the TPP context, creates opportunities for concerns and questions to be voiced, and furthers engagement and buy-in of TPP and K-12 stakeholders.
 - Engage in extensive fact-finding and collaborative readiness. Specifically, US PREP should dedicate a period of time to ensure that the Implementation Team can meet with stakeholders and gain insights into their perceptions of the program and community. This fact-finding and relationship building is challenged by time constraints that blend the Exploration and Installation stages and truncate the important groundwork of contextual understanding.
 - Create a consistent and inclusive communication plan that establishes a clear definition of the transformation and its goals, promotes feedback and collaboration across stakeholders, and develops processes for disseminating transformation plans and updates. In creating the communication plan, US PREP can also provide necessary trainings and resources for communication leaders who encounter pushback or tough questions.
 - Gain greater clarity on implementation timelines and aspects of the model that are flexible versus non-negotiable and then communicate this understanding to stakeholders. With shared expectations, US PREP and programs can better assess progress and room for growth.

These findings tell only portions of the Cohort 2 transformation story. This report will be used to provide more context for quantitative analyses of surveys and candidate/graduate outcomes. Furthermore, this report can help inform subsequent data collection and data analyses with Cohort 2 institutions as they progress towards Full Implementation.

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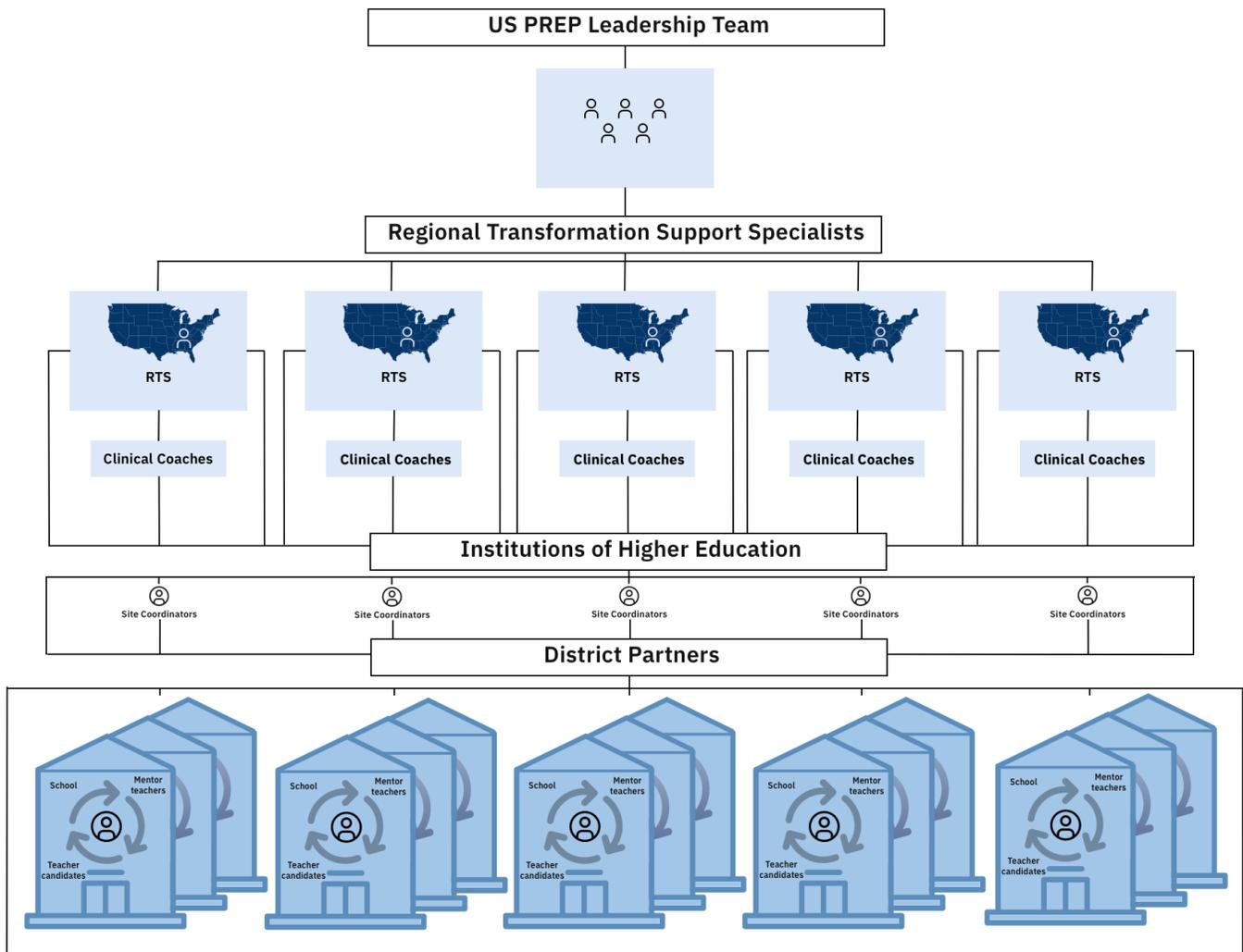
Introduction

In 2015, the Bill and Melinda Gates Foundation (“the Foundation”) awarded Texas Tech University a grant to fund the University-School Partnerships for the Renewal of Educator Preparation (US PREP). The goal of the initial grant, part of a \$34 million investment in five teacher preparation Transformation Centers, was to support the development, implementation, and scale-up of sustainable, high-quality teacher preparation programs (TPPs).

With the initial grant award, US PREP developed a pilot coalition of six universities dedicated to transforming their TPPs across four quality domains: (1) building teacher candidate competencies; (2) using data for continuous improvement; (3) support-

ing teacher educators; and (4) building strong partnerships with K-12 districts and schools. Over a three-year period, US PREP offers technical assistance that includes the support of Regional Transformation Specialists (RTSs) and Clinical Coaches who train and develop Site Coordinators, program faculty, and mentor teachers to lead transformation. US PREP designs its technical assistance to build the capacity of TPPs to deliver clinically rich experiences. Since its inception, US PREP has created a coalition of three cohorts of university-based TPPs at various stages of program transformation. See Figure 1 for an organizational chart of US PREP.

Figure 1. US PREP conceptual organizational chart





To help US PREP and the Foundation evaluate the implementation, progress, and impact of US PREP’s technical assistance, in the fall of 2018 the Foundation awarded a four-year grant to the Education Policy Initiative at Carolina (EPIC) at the University of North Carolina at Chapel Hill. Since that time, EPIC has begun to collect and analyze data to measure program implementation, utility, participation, and outcomes at the TPP, K-12 district, candidate, and graduate levels.

In late 2019 and early 2020, EPIC traveled to all currently participating Cohort 1 and Cohort 2 institutions to conduct two-day site visits. Each visit included interviews and focus groups with key stakeholders, including TPP leaders, faculty, Site Coor-

dinators, teacher candidates, graduates, and K-12 district personnel. The purpose of the site visits was to better understand stakeholders’ perceptions of the implementation and impact of US PREP on TPPs’ transformation process. In addition to the site visits, EPIC conducted virtual interviews with US PREP personnel, including the leadership team, RTSs, and Clinical Coaches to document the internal processes, goals, and systems of the organization.

Grounded in this trove of interview and focus group data, the current report examines US PREP’s engagement with seven Cohort 2 institutions and highlights common themes, challenges, and initial outcomes across the earliest stages of implementation.

Extending Site Visit Findings through Implementation Science

In the summer of 2020, EPIC released the findings from our analysis of four institutions in US PREP’s inaugural cohort (Cohort 1). Throughout the analysis and presentation of those results, EPIC used a conceptual framework based on the work of the National Implementation Research Network (NIRN) and the Center for School Turnaround.¹ In particular, EPIC aligned the outcomes of TPP transformation alongside the implementation stages, enabling conditions, and the work of US PREP as the

primary implementation team.² Table 1 reviews the characteristics of each implementation stage—Exploration, Installation, Initial Implementation, and Full Implementation. These are the stages necessary for the success and sustainability of evidence-based practices and interventions. While each stage is distinct, they are not necessarily linear in progression. Stages can overlap, revert, or repeat throughout active implementation.

¹Jackson, K. R., Fixsen, D., & Ward, C. (2018). *Four domains for rapid school improvement*. National Implementation Research Network University of North Carolina at Chapel Hill. Retrieved from <https://files.eric.ed.gov/fulltext/ED583980.pdf>

² See the Cohort 1 report here: https://publicpolicy.unc.edu/wp-content/uploads/sites/107/2021/03/US-PREP_C1report.pdf

Table 1. Characteristics of the Implementation Stages

Implementation Stage	Typical Characteristics and Activities
Exploration	<ul style="list-style-type: none"> • Provides the space and time to determine organizational readiness, identify key participants and stakeholders in implementation, and establish decision-making processes and shared goals. • Implementation Team regularly meets with relevant stakeholders to determine the needs of the site, the roles of local implementation team members, the capacity for transformation, and fit with other concurrent initiatives and priorities. • Both the site and the Implementation Team come to a mutual decision to progress based on shared goals, best fit, and commitment to change. • Should last for several months to a year. • Often rushed through or overlooked but is critical to successful implementation.
Installation	<ul style="list-style-type: none"> • Readies actors and resources for implementation work. • Primary Implementation Team begins to prepare local implementation teams and strategically identifies and secures resources and drivers. • This stage requires intensive, hands-on preparation including planning for training and coaching, developing assessments and evaluation plans, and talent recruitment.
Initial Implementation	<ul style="list-style-type: none"> • Builds and expands on Installation resources, moving through pilot to scaled and sustainable practices. • This stage requires real-time problem-solving cycles, data collection and analysis of implementation activities, building program capacity, and fostering culture shifts. • Often takes two to four years to fully scale.
Full Implementation	<ul style="list-style-type: none"> • Marked by at least 60% of high-fidelity, high-integrity participation. • Gradual release of responsibility from primary Implementation Team to actors. • All implementation drivers fully functioning and working independently. • At this stage, the innovation is business-as-usual.

In addition to the implementation stages, EPIC modified and applied the Formula for Success, a model illustrating the what, how, and where most critical to induce the desired outcomes of a program, set of practices, or, for US PREP, TPP transformation. Figure 2 displays EPIC’s version of the Formula for Success. EPIC conceptualizes the what as US PREP’s teacher preparation model—data driven, mutually beneficial K-12 partnerships, frequent feedback, practice-based learning, clinically-rich experiences. The how consists of the technical as-

sistance US PREP provides to TPPs to facilitate program transformation (e.g. convenings, RTS and clinical coaching, professional development, financial support). The where are the enabling conditions, including the geographic, political, cultural, demographic, social, and institutional contexts in which TPPs perform their transformation work. Multiplying the what, how, and where together results in a scaled, sustainable preparation model that produces effective teacher candidates and graduates working in partnership with schools.

Figure 2. Formula for Success

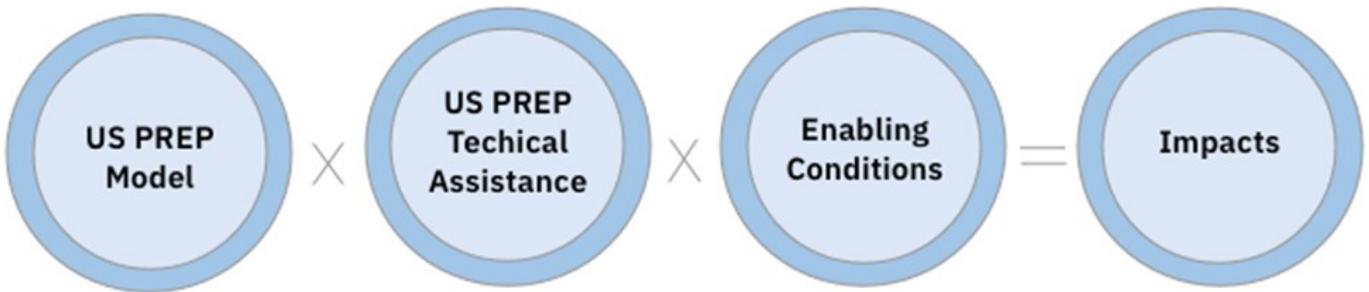
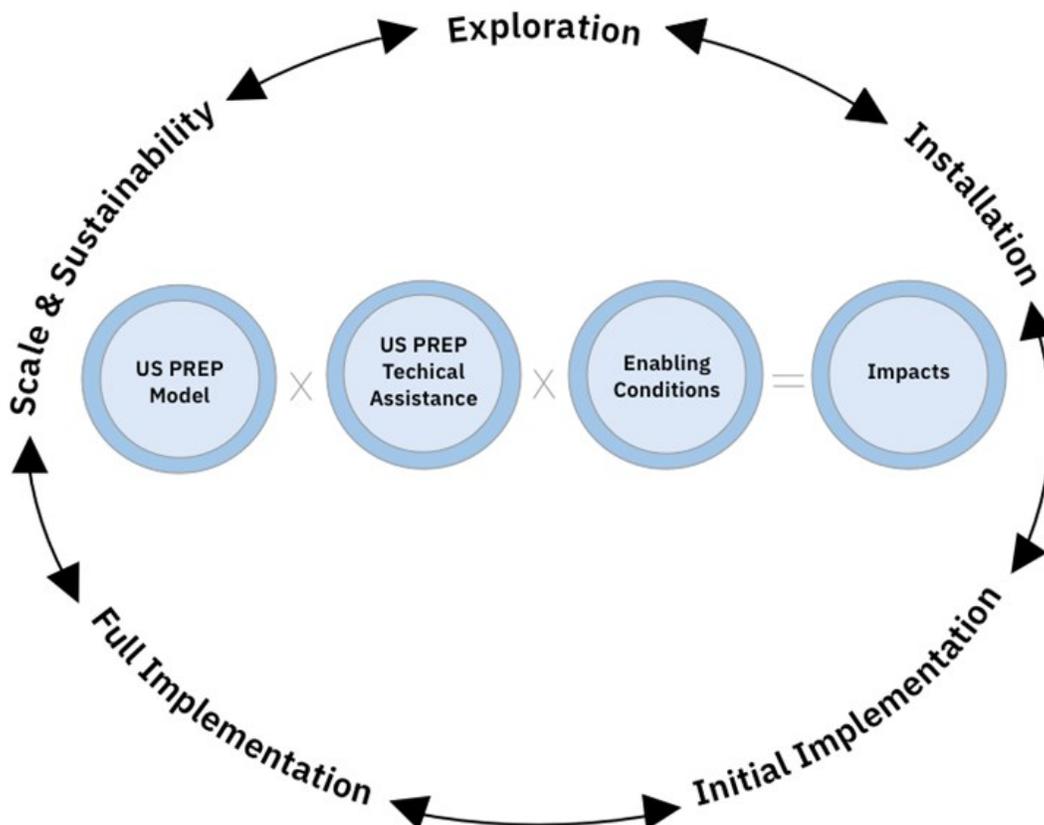


Figure 3 illustrates our full conceptual framework for mediated change in teacher preparation. This

figure combines the implementation stages with the Formula for Success.

Figure 3. The Formula for Success and the Implementation Stages



Organizations need implementation drivers to support their progression through the implementation stages. Implementation drivers are entities and actors that facilitate effective and sustainable implementation. NIRN identified the following implementation drivers: competency drivers (e.g. staff selection, training, coaching, and evaluation); organization drivers (e.g. shared accountability, data-driven decision-making, dedicated capacity and resources, facilitative administration, and systems interventions); and technical/adaptive leadership drivers (e.g. responsive and consistent in managing change processes). Ensuring that implementation drivers are in place and functioning is part of US PREP's technical assistance.

Grounded in this conceptual framework, the Cohort 1 analysis revealed the following strengths and challenges of transformation.

Strengths and Drivers

- US PREP is the primary implementation team and is guided by their Developmental Framework and data for continuous improvement. These resources provide a common language and are essential to facilitating local implementation teams at each TPP.
- Technical assistance personnel, namely Regional Transformation Specialists, and provider-sourced transformation staff, especially Site Coordinators, were highly instrumental in successful implementation.

Barriers and Areas for Growth

- Challenges with effective communication by US PREP and local implementation teams impede faculty buy-in.
- Concerns about scaling and sustainability, particularly financial implications and K-12 partnerships, linger in post-transformation.
- Both US PREP and site stakeholders acknowledged that US PREP can further expand its capacity for explicit equity work in teacher education.

This report uses the Cohort 1 findings as a touchstone by which we measure changes in US PREP's technical assistance, the TPP model, or enabling conditions for Cohort 2. Like the Cohort 1 analyses, this report documents stakeholders' perceptions of the early implementation and initial outcomes of US PREP's technical assistance. Contrary to the Cohort 1 report, the Cohort 2 findings go deeper into the earliest stages of implementation—exploration and installation—and the role of implementation drivers in moving the transformation forward. The current report details the actors and conditions driving the implementation of US PREP's transformation work with each Cohort 2 institution. There is a particular focus on implementation stages; the strengths, challenges, and enabling conditions pushing TPP transformation forward; and how these Cohort 2 transformation experiences compare to those for Cohort 1.



Site Interviews and Focus Groups

From late September 2019 through February 2020, EPIC completed two-day site visits with seven Cohort 2 institutions in the US PREP coalition. Those institutions are Brooklyn College (BC), Touro College (TC), and Lehman College (LC) in New York City; San Diego State University (SDSU) in San Diego, California; University of the Pacific (UP) in Stockton, California; University of Texas at El Paso (UTEP) in El Paso, Texas; and University of Texas at San Antonio (UTSA) in San Antonio, Texas.

During these site visits EPIC conducted interviews and focus groups with a range of university and K-12 stakeholders involved in transformation efforts.

Specifically, TPP leadership (deans, associate deans, department chairs), program faculty, Site Coordinators, K-12 district partners (principals, mentor teachers, HR leadership), data professionals, teacher candidates, and program graduates all shared their insights on US PREP’s implementation and impacts within their respective TPPs. EPIC conducted interviews and focus groups in person and over the phone/video (in rare circumstances). Table 2 presents summary counts of the interview/focus group sample for Cohort 2 institutions.

Table 2. Number of Interview/Focus Group Participants by Participant Role (Cohort 2 Institutions)

Participant Role	University Site Participants ³						
	Site 5	Site 6	Site 7	Site 8	Site 9	Site 10	Site 11
TPP Leadership	4	6	5	8	2	5	6
Program Faculty/Staff	2	10	4	2	5	4	-
Site Coordinators	1	1	-	1	2	2	4
Candidates/Program Graduates	5	13	2	6	5	3	-
K-12 District Personnel	8	8	3	11	4	4	-
Total	20	38	14	28	18	18	10

³ Institution names have been changed to site numbers to protect participant anonymity. The site numbers used in this Cohort 2 report start at 5 because they are a continuation of the numbers used in the Cohort 1 deliverable (Sites 1-4).

Analysis

EPIC generated initial qualitative codes from a group mapping session among evaluation team members who read interview/focus group transcripts and noted recurring themes. The mapping session also incorporated codes and themes from the Cohort 1 analysis. Based on these themes, EPIC refined the codes and revised the initial codebook to schematically reflect implementation stages and aspects of the Formula for Success. EPIC tested the preliminary Cohort 2 codebook among four coders reading the same transcripts. From these sessions, EPIC modified the codebook, developed additional codes, and conducted reliability checks to measure agreement among coders and to resolve coding inconsistencies. The same four EPIC team members coded the remainder of the transcripts. Coders analyzed within each institution, and then across institutions to identify common themes and contributing factors. Finally, EPIC categorized the most pertinent findings across the implementation drivers. EPIC used Dedoose software for all organization, reliability testing, and coding.



Findings

The remainder of this Cohort 2 report details the site visit findings through an implementation science lens, focusing on the earliest stages of implementation and the most relevant implementation drivers. EPIC starts by describing the perceived initial outcomes of Cohort 2 institutions' transformation work. As part of our findings, we also compare the perspectives of Cohort 1 versus Cohort 2 stakeholders to report key ways in which US PREP has changed over time. What follows those findings is an analysis, grounded in the Formula for Success and implementation stages, of what contributed to the outcomes for Cohort 2 institutions. In particular, EPIC illustrates US PREP's role in guiding TPP transformation and identifies successes, challenges, and enabling conditions in each implementation stage. In addition, we detail the extent to which implementation drivers appear across the transformation. By analyzing the perceptions of Cohort 2 stakeholders alongside the implementation framework, EPIC makes recommendations for how US PREP can continue to strengthen its technical assistance and engagement with TPPs.

The What: Perceived Early Outcomes for Cohort 2 Institutions

The following section presents common outcomes experienced by Cohort 2 institutions and stakeholders as a result of their early engagement with US PREP. Similar to Cohort 1, participants from across the sites have begun to experience shifts toward more data-driven practices and experiences, more cohesive partnerships across stakeholders, and changes in faculty buy-in. In addition, stakeholders expressed that transformed residencies furthered the instructional skills of candidates. However, there continues to be communication challenges and a disconnect between the non-negotiables of the US PREP model and flexibility to account for local contexts.

Sites view timely, accessible, and shared data as a common tool for motivating continued transformation

Across most of the Cohort 2 sites, participants described data as a catalyst in motivating change and helping programs achieve their goals. Similar to the experiences of Cohort 1 participants, Cohort 2 interviewees shared a sense that program culture was beginning to shift towards data-driven practices and shared accountability. Specifically, interviewees reported that new data elements (e.g. POP cycle ratings) and improvements to data infrastructure led to necessary program conversations, changes to candidate experiences, greater faculty engagement, and more equitable ownership of the transformation.

Prior to joining US PREP, sites expressed challenges with accessing and incorporating data into

department or program-wide decisions. For instance, analyses across sites found that faculty and department leaders felt frustrated with the lag in data access via antiquated systems, state-level barriers, and central gatekeepers. As one Site 8 faculty member said, "The systems were not good and did not talk to each other for many years. Like, for example, the admissions data did not go into a central place that everybody could look." Access to various data sources was disparate across partners, making the availability of timely data too difficult for faculty to incorporate into their planning and decision-making.

After joining the US PREP coalition, sites shared their appreciation for the support US PREP provides in building and facilitating efficient data infrastructures and systems, such as collaborative platforms, protocols, and management tools.

We had been doing paper instruments for years. My first experience when I got here a year and a half ago was to go through a cart full of observations, one at a time, and upload them into the state system. It was not one of the better weeks of my life. [US PREP] helped me to use Microsoft forms and Google Sheets and Microsoft Flow to automate the collection and the distribution of forms...if you want an example of hands-on, make-a-difference, that's one. (Site 11 Program Leader)

Participants across the sites lauded US PREP's technical expertise in expanding on the collection, integration, sharing, and analysis of other forms of data, including POP cycle ratings and observations, assessments of candidate dispositions, and edTPA scores. Site 7 participants shared that US PREP provided the necessary tools for Site Coordinators to collect and share POP cycle and other candidate and district data. These tools served as an impetus for more calibrated responses and consistency in data collection. Site participants viewed US PREP's engagement with data as a means of pushing faculty to reconsider different types of data outcomes and to make changes to observation rubrics, protocols, and curricula. Further, faculty who had been removed from clinical practice shared that they now had a data-driven view into candidates' experiences and outcomes.

...We are so immersed in [data], every meeting that we have, now we're listening to hear, okay, we're making decisions, but what is it based on and that's how we've been doing it. We haven't really been making decisions on hardcore evidence. That's what we've discovered, so moving forward, our goal is that we're hoping that we're now going to use data to really drive our decisions. (Site 8 Faculty Member)

In addition to motivating data-driven decision-making, data showing positive experiences for candidates in the transformed model helped to garner greater faculty buy-in, particularly for Sites 6, 8, 9, and 11. As Site 11 participants described,

faculty who were initially resistant to the transformation work were still invested in outcomes for their students. Providing them with evidence that transformation was beneficial to candidates was encouraging for those faculty.

US PREP provides a mechanism through which K-12 and TPP partnerships can strengthen and cultivate shared accountability

Participants across all seven sites expressed that their work with US PREP had improved partnerships with K-12 schools and districts. One of US PREP's main objectives is to cultivate mutually beneficial relationships between TPPs and K-12 schools. To accomplish this, institutions select clinical placement sites with whom to share candidate and TPP data and move towards collective accountability. More specifically, US PREP's model incorporates RTSs, Site Coordinators, convenings, and regular Governance Meetings as strategies for strengthening clinical partnerships.

Governance Meetings were critical to forging stronger bonds between TPPs and K-12 districts and schools. At the time of data collection, all but one site had participated in at least one formal Governance Meeting. Facilitated by the Site Coordinators, with support from RTSs, the Governance Meetings provided a collaborative format to discuss POP cycle data, goals for candidates, and criteria for mentor teacher selection and training. Further, through US PREP's support and training, Governance Meetings provide opportunities for constructive, but potentially difficult conversations between the stakeholders, such as the qualifications and performance of mentor teachers.

If you understand the basic accountability structure of what the schools are dealing with, we have our own...That's massive, and then understanding what sensitivities are, so when you pull a governance structure together, you know that that trust-based structure is really trust-based. (Site 10 Program Leader)



Though all the sites have had relationships with K-12 schools as part of their clinical requirements, several participants from both the TPP and K-12 schools felt that those relationships were largely transactional. That is, K-12 personnel viewed their history with the TPPs as one-sided, wherein TPPs used the schools for placements and K-12 staff had little input.

So, we're at a place now where we are developing a mutual relationship with the district. Less so of one we need from you and can you give us a placement or the district saying, 'We're going to launch this program, would you like to participate and follow the lead of the district?' (Site 11 Program Leader)

However, some sites had cultivated strong partnerships with K-12 schools through other initiatives or years in the field. For instance, Site 7 had a long-standing relationship with their partner district and a common commitment to equity and social justice issues. Through engagement with US PREP, the nature of the partnership shifted towards a deeper and more trusting connection, where a broader range of K-12 personnel (e.g. principals, mentor teachers) have a seat at the table.

Prior to our relationship with [Site 7] to this current one where we're engaged in all these grants and all of these amazing conversations and supportive culture, it's truly a highlight of my career of 32 years. It really is phenomenal, and it's transformed our business practices as far as recruitment and what we're doing at the sites and in the classroom. (Site 7 K-12 Leader)

Given the nature of the NYC Department of Education's (DOE) unique role in initiating institutions' engagement with US PREP, participants from NYC sites found that the work with US PREP has provided a critical conduit to communicate and work alongside the large district. Prior to their work with US PREP, NYC sites were expected to forge relationships with local K-12 schools on their own, working around DOE mandates and limitations. Further

more, TPPs and the DOE had experienced a rocky, and at times, distrustful relationship in the past. TPPs felt disconnected from the centralized DOE and believed that district representatives did not understand or appreciate the work of teacher preparation and the needs of candidates. However, through engagement with US PREP, participants from the DOE, K-12 schools, and the NYC sites expressed a shift towards a more collaborative and open relationship. Participants from one NYC site found that the conversations with the DOE were "transformational." Another described the ways in which Governance and organizational meetings helped make the district more accessible to the TPP.

For me, what is more significant is direct involvement of the DOE in the process. Very rarely did we really have DOE organize these meetings before us and them [were] involved in regular, monthly, or biweekly meetings or biweekly Zoom meetings, you know virtual meetings. I think that's the key because it really shows the commitment to this process. (NYC Site Program Leader)

Overall, participants across the sites expressed an increase in shared accountability for candidates and graduates. District and school personnel feel more involved and that their expertise is appreciated by TPPs. TPP faculty and staff appreciate the deeper connection to clinical settings, particularly for tenure track professors who may not have an opportunity to work in the field. The collaboration also sets the foundation for a stronger pipeline between TPPs and K-12 schools.

We communicate and we have a good relationship. We're helping [the TPP] get candidates into their program, and they're helping us get teachers, so it's a win-win. We know what they need and they know what we need, so we're working together to get it done. (Site 9 K-12 Leader)

Participants agreed that reformed residency experiences positively influenced candidates' growth and readiness

Overall, site visit participants expressed that teacher candidates who experienced reformed residency programs displayed more confidence and greater preparedness to enter their first year in the profession⁴. Although not all sites have transitioned to year-long residency programs, participants found that increased time in clinical settings, as well as connecting theory and practice through student teaching seminars, had been beneficial. As one Site 9 teacher candidate explained, "I love the program and what it has to offer and being in the class longer than everybody else is really a benefit for me and for the students, as well, to get to know me."

Site Coordinators, mentor teachers, and K-12 principals found that candidates experiencing more robust clinical training displayed greater confidence and more ownership over their teaching. Candidates who entered their classrooms prior to the start of the school year were able to help with preparation for the first day and participate in staff trainings and professional development. In doing so, candidates showed a higher level of comfort and self-assurance than previous cohorts of student teachers.

I was absolutely thrilled when [my candidate] came to the classroom, and she frankly took over and she was leading her through the classroom and telling [the Site Coordinator] what we do, how we do it, and why we do it. I never thought that she would feel that comfortable and being so knowledgeable and taking everything in and being fine with everything we do. So it's like taking ownership of the classroom...It was really great to experience that. I think she's going to be a great teacher one day. (Site 6 Mentor Teacher)

K-12 principals also expressed excitement and pleasure at the opportunity to entice candidates in residencies to stay and teach in their clinical placement sites. One Site 9 principal described the residency as a "year-long job interview", acknowledging the benefits of training a candidate to know the curriculum and the students in a robust way.

Candidates also described feeling well-prepared, confident, and knowledgeable as a result of their residency experiences. Participants found that having a cohesive clinical experience supported by Site Coordinators and bolstered by student teaching seminars also helped them apply what they learned during their coursework. Students, particularly those who participated in a year-long residency, appreciated the opportunities to truly connect with their mentor teachers and K-12 students and witness their growth as teachers throughout the year.

It is crazy seeing the huge growth...from our first couple of weeks at the school to now, just being able to handle a classroom, also understanding why it is that we do certain things, working with the kids, just learning the skills on how to teach, not just why it is that we teach this, but learning how to teach it. I've seen huge growth, not just within myself, but also with the other interns. I see how confident they've become in the classroom, so it's definitely been a huge growth from then to now, so hopefully from now until later, it'll be even better. (Site 10 Teacher Candidate)

US PREP's initial communication efforts and understanding of institutional contexts are an ongoing challenge

Despite these early outcomes—improved data access and infrastructure, deeper K-12 partnerships, greater candidate readiness—communication between US PREP and faculty continues to challenge implementation. This is particularly true for strategies to adapt the transformed model to each unique context. Sites acknowledged that US PREP has the technical expertise, knowledge, and resources necessary to fully realize their transformation goals. This includes repositories of samples, benchmarks, and accountability measures. However, participants across most of the sites perceived US PREP as not yet having a full understanding of the contexts in which the work is happening.

⁴Pilot residency programs were just underway at the time of data collection, and do not reflect a full experience.

Specifically, site participants noted that in introducing the work to faculty, US PREP focused on areas for TPP improvement and failed to recognize the positive work already ongoing at the TPP. For instance, one Site 11 faculty member noted that although the TPP has a long history of mentoring students, US PREP did not honor or acknowledge the positive aspects of that work.

We do a lot of mentoring of students, and that takes a lot of time, so I feel more like [US PREP training] is just something that I have to bear and get through, not that really US PREP is a resource and here to assist me, but more like they're telling us where we're not performing well and we have to do these changes. I don't think they see it as an assistance thing. I think they see it as someone who's coming in who's inspected you and you're not up to par and you need to get better. I think that would be more of what my faculty would say. (Site 11 Faculty Member)

I know I like a high rate of reinforcement, so for me, I like a lot of positive things to be said. That keeps me going, and I'm aware about that, but I don't get that sense from US PREP folks. We don't necessarily feel that way. (Site 7 Program Leader)

The perceived gap in US PREP's knowledge and understanding of TPP contexts affected the ways in which the organization introduced the transformation work. This influences initial buy-in throughout the TPP. For instance, when faculty felt that US PREP did not incorporate the history or culture of the TPP into their planning, faculty expressed frustration and resistance, thinking of the transformation as another "top-down" initiative. Further, some site participants felt that US PREP's incomplete understanding of the teacher candidate populations posed issues around equity and social justice.

We're an accredited institution, but also the large amount of students that we're serving across so many different neighborhoods and it's really complex, so anything that comes from outside, without a real knowledge of

what happens in [location] is seen as just another, someone else is trying to get their street cred in and we've been there, done that, did something in [location]. But also, this 'white savior' complex that is always there, they're like 'Oh, we're just going to go over and save these children and communities because we know how things should be done.' (Site 5 Faculty Member)

For some sites, questions about the flexibility of US PREP's model still linger. Participants in Sites 5, 6, 7, 8, and 11 initially felt that the US PREP model was too scripted and did not allow enough room for adaptation around unique circumstances, such as unions and the diverse needs of candidates. Leaders of the Site 7 transformation continue to grapple with non-negotiable aspects of the model, the timeline of implementation, and allowances for local missions and goals.

What I suggested is that US PREP identify the critical non-negotiables and then see what the context is like and where they can be flexible because they say the words, but we're not seeing it in action and I think that comes from maybe not knowing, so maybe [RTS] doesn't know what's flexible. (Site 7 Program Leader)

While there are questions about non-negotiable elements and flexibility, sites also noted that US PREP found ways to work with them to revise and adjust timelines and structures. For instance, faculty from Site 9 praised US PREP's adherence to best practices and their advocating for the importance of the work. Site 10 participants described the ongoing give-and-take, noting US PREP's continued growth.

US PREP is learning about how this region is...They're learning from us in terms of even improving their own program and improving their own process for expansion because not all states are the same, not all regions are the same. We know that they're nationwide, but everything is unique, and I think what I appreciate is that they're starting to understand, maybe it's not fully there, but they're starting to understand that one size doesn't fit all. (Site 10 Faculty Member)

The What: Changes in US PREP between Cohort 1 and 2

In this section, we consider key areas in which US PREP changed aspects of their engagement with institutions between Cohort 1 and Cohort 2. We identified these changes based on our Cohort 1 and Cohort 2 site visits. As such, these areas may not reflect all the key adaptations made by US PREP over time. Likewise, it is important to note that while these are areas of change for US PREP, stakeholders may still perceive these as areas for further growth.

US PREP and institutions engaged in earlier conversations about scale up and sustainability

EPIC visited Cohort 2 institutions early in their pilot year with US PREP—between September 2019 and February 2020. Despite this timing, stakeholders across Cohort 2 sites indicated that they were already engaged in scale up planning with US PREP. These conversations typically transpired with the RTS and local implementation team and initially focused on the scale up of the transformed residency experience. In particular, these conversations centered on what the scale up of the residency experience would look like in terms of the number of candidates participating, the departments involved, and the districts/schools hosting candidates.

...US PREP has created scaling documents and this is their general approach. So, they're going to share with the chairs the scaling documents worksheet and provide information maybe in a Powerpoint. So, I would take a different approach. I would talk to the chairs about where are we? What do we know about scale? Where do we want to go? How can they be helpful in giving us information? I'm not sure that's going to happen [at the meeting] because there's already documents created about how they're going to inform people about scale and I sort of get a sense of where these things came from. I think scale was an issue in Cohort 1, so they're compensating in Cohort 2 by being systematic, intentional, and organized, which is good. (Site 7 Program Leader)

For the fall, we're going to have triple the number of people coming for placement, so we just had this conversation that wow, we just had close to 30 possibly and what would that look like? As we scale into other districts, we do have a couple of students who are wanting to go into other districts to do the same model and so, to have a secondary person already receiving the [Site Coordinator] training along with [other coordinator], once we can have the person trained and then the next year, 20-21, now we have a second Site Coordinator that can spread those details out. Almost like begin training the next Site Coordinator to come aboard and that would include going on visits with [existing Site Coordinator] and taking a couple of students themselves to begin to learn and then just keeping widening out that circle. (Site 9 Site Coordinator)

Scale up conversations and planning were somewhat different for the three NYC institutions in Cohort 2. Those institutions faced challenges in securing placement sites that were approved by the NYC DOE (Teaching Academy schools). This made planning for specific numbers of candidates and sites more difficult. Likewise, each of the three NYC sites had semester-long rather than year-long residency experiences. In one sense, this offered programs more frequent opportunities to innovate or make changes to the residency model. However, it also meant that programs were more frequently having to identify residency-eligible candidates, recruit them into the model, and secure sites and mentor teachers.



At the time of the site visits, fewer institutions were actively discussing the curriculum changes that will be required to accommodate the transformed residency. In particular, programs were making changes to student teaching seminars to fit with the residency but had made less progress in considering how other courses, prior to student teaching, would need to change. However, there were several sites where they were already discussing curriculum changes and how they would naturally lead into all candidates completing a transformed residency.

For example, for me, it was a new thinking that to put the clinical experience in the center of curriculum design and then, sort of a vertical line of curriculum design and then the result should come around it, so that's a different principle. It's more than just alignment of clinical experiences throughout the program. It's more of thinking how you're going to send on that spiral with the clinical being in the center and then thinking, okay, so how do our core courses look like and how do our methods courses look like and what kind of experiences are appropriate in the middle, at the beginning, and at the end. (Site 8 Program Leader)

We've tried to put delivery in places where it needs to be delivered, on time, so that it maps up with our methods courses, which are going to be majority adjusted because of yearlongs. It's just moving things where they need to be and making some significant, but not a lot of changes in the actual structure of the course. More than that, actually knowing what the left hand and the right hand do so that we know that you're delivering that there, I'm doing this here, so it's not totally mushy and overlapped. It's not build one on top of the other. So that's the work that we've been doing through a full on curriculum mapping process. I hired a curriculum coordinator for that to come in and run that whole thing, so we're trying to be really serious about that work. (Site 10 Program Leader)

In addition to scale up planning, US PREP and institutions were also beginning to engage in conversations around model sustainability. These were early conversations but are important in making sure that programs are not overlooking longer-term sustainability as they deal with the more immediate challenges of initial implementation and scale up. In considering sustainability, challenges regarding the funding of the Site Coordinator role and the ability of all candidates to participate (given family and financial responsibilities) remain.

US PREP allowed more model flexibility to meet the needs and goals of institutions

Perhaps the largest change between the early stages of implementation for Cohort 1 and Cohort 2 is US PREP's evolution from a more rigid, prescribed preparation model to one with greater flexibility for program goals and context. This change is evident in the individualized transformation plans and goals that each RTS and respective institution create and in the allowances made to the US PREP model. For instance, US PREP supports semester-length residency experiences in NYC, allows for variation in the structure of Site Coordinator roles/responsibilities, extends flexibility in transformation timelines, and partners with programs to adapt or better understand existing instruments/measures rather than require that certain instruments/measures be used.

I think that it has felt that they've been asking us where we want to start, why we want to start there and what our goals are, in communication with the Dean, and afterwards, so setting up that first communication with the Dean, including the Chair and the faculty for further tailoring of how the transformation can look like, what their priorities are once they have been set by the Dean and our transformation leaders. (Site 5 Program Leader)

They really take us where we're at and what I think I really appreciate about it is it isn't a formulaic approach of okay, you're joining us so here's how you're going to do it now. It's much more of a here's what the general idea of what we want to do and here is how this university has done it. Their flexibility, I think has been fantastic of taking us where we're at, what variables we're dealing with as a university and as a community, and trying to figure out, well [other site] has done something like this, so let's drag in those, so just having that consortium thought partner has been amazing. (Site 7 Faculty Member)

This flexibility matters because of what it means for program buy-in and ownership. With flexibility, programs have greater agency in the transformation process. In many Cohort 2 programs, stakeholders

reported that their RTS was providing resources and supports to help them meet goals that were important to them. This type of flexible engagement contributed to stakeholders feeling that transformation was something in which they were actively participating rather than something that was happening to them.

Are you going to impose something that we know is not going to work? We might try some things, but we already tried some things. Are we going to be able to have a conversation about this? I think that one of the reasons why this has been accepted by the faculty, as it's been introduced, is because they do feel that their voices are heard, there is this recommendation, the support to try out this recommendation, to accommodate for the things that people feel that need to be accommodated because they would not otherwise work. That respect for the knowledge that is already here with the resources to be able to carry out some things, I think that that has been something that has happened consistently since we started the pilot. (Site 5 Program Leader)

My perspective is that they're [US PREP] saying, we'll let you see for yourself that you're going to need a yearlong residency because they're just like, okay, here, cut it down, scale it down instead of eight walkthroughs, do four. I think US PREP, because of their experience they have gone through with so many different universities, they know that if you really want to enrich clinical field experience, you're going to see that you need at least two semesters. But they're making us see that, which I appreciate. (NYC TPP Site Coordinator)

Evolving towards a more flexible model does present some challenges for US PREP. First, it requires US PREP to more deeply know and understand the context of the institutions with which they are engaged. As documented in this report, that remains an area of growth for US PREP. Second, it requires US PREP to identify and clearly communicate which elements of the model are flexible and which elements are non-negotiable. Some Cohort 2 programs expressed confusion about the non-negotiable elements and timelines. As such, it is important for US PREP to communicate with greater clarity on model adherence and fidelity.

The How: Implementation Stages

As the primary implementation team, US PREP guides TPPs through the four implementation stages. The following section explores stakeholders' perceptions of the activities, supports, successes, and challenges that Cohort 2 programs have encountered throughout the first two stages—Exploration and Installation. For these stages, EPIC makes recommendations to US PREP for the continued refinement of their technical assistance and the drivers critical to its successful implementation.

Exploration

The first phase of implementation is Exploration. The purpose of the Exploration stage is to nurture readiness for change within the organization.⁵ During the Exploration phase, the initial Implementation Team regularly meets with relevant stakeholders to determine the needs of the site, the roles of local implementation team members, capacity for transformation, and fit with other concurrent initiatives and priorities. This phase can largely be characterized as a fact-finding and relationship-building mission and can last for months before moving to the next phase. The hallmark of this time is that both the site and the Implementation Team come to a mutual decision to proceed. Coming to this shared conclusion requires the site to have clarity and understanding of the goals of the work, the involvement of staff, and pertinent timelines. Organizations eager to proceed with implementing new initiatives often rush or overlook this critical process, resulting in mismatches in innovations and teams.

To analyze stakeholders' perceptions of the Exploration stage, EPIC categorized processes and events that occurred from member universities' introduction to US PREP through selection into the coalition. This period includes any communication or early events, the application process, selection into the coalition, and perceptions of fit.

Sites' motivation to join US PREP was centered on aligned program goals but preconceived notions about US PREP hindered initial progress

Across the sites, participants noted that they were motivated to apply to US PREP because they felt

that the goals of the organization were aligned to their own internal goals. In particular, stakeholders perceived US PREP as a resource to further objectives—i.e. better use of data, richer clinical experiences—that were already a priority for the TPP.

Part of the mission of US PREP around diversity and inclusion and preparing a diversity of educators that are also ready for day 1, I think resonated very much with our mission as well. (Site 5 Program Leader)

We thought that this was a great opportunity because we could really do things that really matter to us and US PREP really assured us that they were interested in the local context and how we make sense of it in growth in our own way, using the tools to process that it's unique to us. (Site 7 Program Leader)

Stakeholders across several of the sites were encouraged to join the US PREP coalition to leverage much-needed resources and funds that would help push their goals forward.

We did our own self-assessment and there are some areas that we need to make improvements. I think the curriculum piece, not only in our college, but also our partnership with other colleges, like for the secondary education. We just need a push or just to be with US PREP to really help us (Site 10 Program Leader)

⁵<https://nirn.fpg.unc.edu/sites/nirn.fpg.unc.edu/files/resources/SISEP-Brief3-ReadinessForChange.pdf>

Despite the aligned goals and potential access to funding and resources, sites expressed that faculty and leaders held a variety of misconceptions about US PREP and the transformation process that hindered initial buy-in, communication, and understanding of the program. For example, participants from several sites thought that the US PREP funds would be used to pay their candidates stipends for participating in the residency experiences. They were disappointed when that was not the case.

Interviewer: Did you have any hope or expectation that some of the money could go to your candidates?

Respondent: Yes. That's what we were hoping. At that time, we didn't know we would have to have....when we first had that conversation, we didn't know that we were going to have to have all these resources... We thought, we said okay, cool, we could use this to support some candidates because you know when you hear the grant, it sounds like a lot of money, but then when you start to allocate it, it's like, that's really not as much as we think it would be. (Site 8 Program Leader)

Participants from sites 5, 7, and 10 mentioned that faculty and K-12 partners were skeptical of US PREP's association with the Bill and Melinda Gates Foundation, as well as their interactions with former US Secretary of Education, Betsy DeVos. In particular, interviewees cited work and stances taken by the Foundation and Secretary DeVos as being opposed to public education. This contributed to a lack of trust and buy-in.

The make-up of sites' application teams impacted communication and buy-in across institutions

There were meaningful differences, across sites, in the composition of application teams and in the forces motivating TPPs to apply to US PREP. Most notably, the NYC DOE was the guiding factor for recruiting NYC institutions to apply for US PREP, whereas the other four Cohort 2 sites' decision to move forward was institutionally led.

A big motivation was our very close and good relationship with the NYC DOE office of teacher recruitment and quality and the folks in that office, through [university colleague], we first got to know them and they're dedicated to the

exact same principles of equity and helping the kids and they're sharp and smart, so they had that idea of the teaching academy and we worked with them closely on that and had a very good experience...then they asked us, would you like to work with us in this so that we can scale and get this thing going that we've already started. So, of course, we said yes and we filled out the application. (NYC Site Program Leader)

Generally, Cohort 2 institutions had a limited, exclusive group or single individual completing the US PREP application process. For most of the sites, the person/people responsible for completing the application and meeting with US PREP were deans, associate deans, or one higher-level faculty member. In contrast, although Site 7 was primarily pushed forward by one department chair, their application team was faculty-led and incorporated stakeholders across multiple departments and K-12 partners. Sites 10 and 11 incorporated their faculty earlier or more frequently, although the process was still controlled by exclusive teams. Sites 5 and 9 also included their K-12 school partners in the initial application and interviewing stages but with varying degrees of engagement.

[Colleague] and I got involved, but we also saw that because we wanted to have opportunities for school of teacher ed and SPED to collaborate that it seemed natural to bring in the dual language and English learner department as well because we want candidates from all departments to be working together. (Cohort 2 Program Leader)

Due to the exclusive nature of the initial application teams, particularly those that were dean-led (Sites 6, 8, 9, and 11), site visit participants perceived the application leaders as "gatekeepers" of the US PREP transformation work. As such, faculty felt like they were kept in the dark about the purpose and focus of their work with US PREP. The lack of broader representation and communication led to faculty mistrust, confusion, and initial resistance.

In contrast, sites that included faculty early and often in the application period (Sites 7, 10, and 11) experienced greater buy-in and understanding from the start. Leaders from Site 10 shared that their faculty were onboard early and excited about the project. Site 11's application was led by a former

faculty member who was now in a leadership position and was very much respected and well-versed in the history of the program. As such, the faculty trusted the process and anticipated the work of US PREP more openly than those in other sites.

The one thing the Dean was very clear about was that we will do what makes...regardless of what is expected in this grant, we will do nothing that doesn't make sense for who and what we are. And he was very clear about that and once I had that insurance from him, I was like, okay. (Site 10 Program Leader)

I don't know if US PREP does that kind of model where they have someone on the inside that says, hey, and it works like that, but I think that that's where the buy-in has come in and then [X] will meet with us in our smaller program areas just because she is in our department about other things, so then we can ask more questions about US PREP, so I think that's in a way how the information has been distilled and why we've created the buy-in. I haven't had to convince people to go on (Site 11 Program Leader)

Communication strategies varied across sites, but US PREP convenings were a common tool for “spreading the wealth”

According to participants across the sites, initial communication to faculty was either US PREP-led or TPP-led. Depending on the strategy, this resulted in contrasting perceptions. For instance, sites that utilized a TPP-led approach, such as Site 7, found that faculty were more engaged and knowledgeable about the transformation. When Site 7 faculty leaders introduced the transformation work across the departments, there was a general feeling that the initiative was internally, rather than externally, motivated. Further, sites where deans or department chairs had deep roots in the TPP or had the trust and respect of the faculty, such as Site 10, also garnered more buy-in through their initial communication efforts.

So, everybody in the education department was asked for feedback to create the proposal, so from the proposal stage, everybody

was aware of it because they were asked to contribute. That's not to say that everybody did or people put random two cents in that they didn't do the bulk of the work, but everybody was aware from the proposal stage. (Site 10 Program Leader)

When it comes to faculty buy-in, we held a kickoff the day before classes started this August and it was held for an entire afternoon and faculty members were invited from all departments, the department Chairs led it along with XX and YY...We probably had at least 50 people there. Does that always mean that they're buying in? Not necessarily, but it shows that they wanted to come. They wanted to learn about it. They wanted to participate and XX and YY [US PREP personnel] led them through some activities that helped them understand more about US PREP and what they can do for us and AA and BB and CC [university personnel] also led them through some things, more from our perspective, so they saw the collaboration and the cooperation between the two. (Site 7 Program Leader)

Sites where US PREP led initial communication efforts to faculty and staff experienced higher levels of faculty reluctance and resistance. Participants from these sites reported a large proportion of faculty who were still unaware of the transformation work, its purpose, and the role of US PREP. Several participants found that US PREP's presentation of their role and model felt generic and lacked the contextual nuances that faculty would have valued. Others viewed the work with US PREP as another “top-down” mandate, and given the lack of attention to the positive work of the TPP, expressed feeling like US PREP was “faculty bashing.”

I went in it thinking, it was like we were having to do this model without really knowing what we are, but as I talked with [US PREP personnel] and learned more, they were like, no no no, we're going to share with you what we do and you make it what makes sense for you. When they said that, I was more open to it, but it was presented to us like we were all going to do this thing in this way and I think it got a lot of faculty not happy. Initially, at least. (Site 5 Program Leader)

Despite these different communication strategies, participants across all of the sites found that the US PREP convenings and networking opportunities were most beneficial to gaining a more comprehensive understanding of the program. These events were also a way to gain greater stakeholder buy-in. Specifically, TPPs invited faculty and K-12 partners who were not initially included in the application teams to US PREP convenings. This was a way to “spread the wealth” to more individuals. Participants shared that the convenings provided support, clarity, and a repository of resources. Convenings were also an opportunity to learn from Cohort 1 institutions. As such, the convenings provided opportunities for institutions to show their commitment to the process and to build a collective vision across stakeholders. US PREP’s provision of these onboarding activities to a broader set of stakeholders was key to building more collective buy-in and ownership.

So, the 3 of us actually were the first 3 people to actually go and learn more about US PREP and that was right after submitting the application. We hadn’t even known whether we were accepted to the program. And then, I think in October, another team of people went out to San Antonio in December, another team. So, one of the things we tried to do is spread the wealth, so it’s not the same people who were going to the convenings, so that was a way of also informing the body. In February, I think we heard in December that we had gotten accepted and in February, our regional specialist came in and they did an onboarding session with even more people to include faculty. (Site 8 Program Leader)

Installation

The Installation Stage marks the time when resources and organizational/personnel competencies are identified and put into place in preparation for Initial Implementation. During this stage, the local implementation teams are working to build their internal capacity, including recruitment, training, coaching, funding, and resource procurement. Furthermore, they put into place the necessary training and data systems critical to improving the work of the implementers. In this section, EPIC describes

the role of US PREP in moving the personnel and competency drivers towards Initial Implementation.

Participants perceived RTSs as supportive, part of the faculty, and an advocate.

Like our Cohort 1 findings, participants from Cohort 2 found the role of the RTS as critical to driving the Installation forward towards implementation. Across the sites, interviewees praised the RTSs for their responsiveness, resourcefulness, and their accessibility and visibility to faculty and K-12 partners. In building the internal capacity of the local Implementation Teams, a major role of the RTS was delivering a consistent message about the goals of the transformation and keeping the mission front and center. This was important for faculty understanding and buy-in and helped keep local implementation leaders focused on their objectives.

In addition, RTSs collaborated with the local Implementation Teams to assign roles and responsibilities early on. This was a recommendation from the Cohort 1 site visit analysis. Work between the RTS and local Implementation Teams also included strategizing communication to faculty and focusing on moving away from the perception of the transformation as a top-down initiative. Though some sites acknowledged miscommunication and challenges with RTSs, including their understanding of the local context, overall, sites found the RTS role as critical to building internal capacity.

They are extremely supportive in getting materials that we need or I mentioned that XX led the [professional development session], so it’s not like if we say we won’t want this or when we said, we’re going to do the teacher candidate rubric in this way, she attended the meeting and then gave us really good feedback and has been supportive on that and what can they do. She will take notes, which is my least favorite thing, is taking notes on things and details, but she’ll do that and keep track of that. So, I’d say they’re really helpful, but I think this is unique, this collaboration. (Site 7 Program Leader)

Aligning transformation work with concurrent initiatives is crucial to the transformation process and resource allotment

Across the sites, edTPA requirements created a burden for both TPP faculty and candidates. While some sites had already started engaging with edTPA, others were beginning to pilot the performance assessment. As such, the demands and rigor of the assessment often competed with the new requirements of the US PREP transformation. For instance, for sites who were not doing yearlong residencies, timing of the POP cycles and the required edTPA lessons competed with one another, causing frustration for site supervisors and candidates.

And it's extremely stressful for our students. It's unhealthy I would even say in most cases the amount of stress they're under to complete student teaching, to complete the edTPA. In many ways, I feel like the time that they're focused on edTPA takes away from an authentic student teaching experience. They have classes they're still taking. Many of them are parents. It's not a great model for the health of our students and their capacity to understand teaching in that environment is impacted. (Site 6 Faculty Member)

For me as the mentor and I believe for the students because I think that they're getting sets of instructions from [X] College and from their professor and then they're getting additional and sometimes conflicting from US PREP and then they have to do the edTPA. I didn't have to do it, so...So, it seems like they're putting more burden on the candidates as well and I've never experienced something as intense as I did last semester. (Site 5 Mentor Teacher)

Limitations on clinical placements also caused conflicts in preparing for residencies, particularly for sites in NYC. Participants described the challenge of adhering to the DOE Teaching Academy requirements that prescribed the K-12 school sites that TPPs could recruit for residency placements. For one NYC site, having to focus their efforts on specific placements was difficult given their extensive histories with non-DOE placement sites. This caused conflicts with long-standing partners.

But then a concern was in learning about it was that [CITY] was saying that it was going to be in the teaching academy schools, which we already knew had almost no...there was one school that I think had kindergarten, first, and second (K-1-2)...one of the teaching academies had K-1-2, but only a couple classrooms of each, so there's no way that...we're like, how is this possibly going to work with our program when we have schools that we have partnerships with, there's one school in [SUBURB] that has 24 preschool classrooms all in one school and it's an excellent program and so we were like, we want to be able to work with these because they can't take all of our...even that school with 24 classrooms can't take all of our students, so that was an additional concern. (NYC Site Faculty Member)

In the teaching academies, they didn't have an EC (exceptional children). I didn't really know that and then I had somebody from the DOE show me the list of what are the schools and maybe there was one, but most of them were middle school and high school. (NYC Site Program Leader)

In contrast, several sites described how complementary initiatives, such as those afforded by Raise Your Hand Texas, provided initial momentum for the transformation work. In particular, participants reported that their US PREP transformation efforts were bolstered by existing initiatives that had funding/resources and that were aligned to the goals of transformation.

The challenge is if you're going to do it, from my perspective, challenges are going to engage in train and change strategy, you don't want to be doing different strategies, different evaluations, and different reporting structures. At least when it comes to US PREP and Raise Your Hand Texas, I started with the conversation with both organizations and us saying, like we'll work with both of you, but we'll only do one program, so they said okay. (Texas Site Program Leader)

Selection and training of Site Coordinators and mentor teachers determines the foundation for transformation

An essential part of the Installation Stage involves US PREP and the member institutions recruiting, selecting, hiring, and training the initial Site Coordinator(s) and mentor teachers. US PREP views both roles as essential to the intensive clinical experience, the cornerstone of the transformed model. The Site Coordinator role is critical to building close relationships with K-12 school and district leadership, fostering faculty discussions around data, and assisting in the selection and support of mentor teachers.

When recruiting for the Site Coordinator role, US PREP staff seeks out individuals whose prior experience in coaching teachers, leading adults in instruction, and revising curriculum will help them bridge theory and practice. Other important qualifications for Cohort 2 sites included ties to the university, K-12 district, and community (Site 8); an ability to provide organized, responsive, and student-centered coaching support (Site 9); an ability to work collaboratively with faculty and leadership (Site 5); and a connectedness to faculty experiences and knowledge (Site 8). With these qualifications, Site Coordinators play a critical role in building a bridge between the different stakeholders, especially early on, as part of the local implementation team. The inclusion of Site Coordinators in the initial implementation team ensures that all necessary stakeholder support systems are represented during the Installation and Initial Implementation periods. Broadening representation in the local implementation teams is critical to garnering buy-in and amassing proper resources.

I think it's really important that whoever the Site Coordinator is understands the system, understands the school, understands the needs and the mandates of not only the district leader, but of the school leader. Every building has their own culture, and you need to understand that. (Site 8 Site Coordinator)

Selection differed across programs, with some sites recruiting their Site Coordinators from among internal staff (sometimes transitioning from original

University Supervisors) and other sites making an external hire. Site Coordinators that were recruited internally from a pool of faculty or other staff found it easier to develop into the role as they had pre-established relationships within the TPP. In some cases, however, these individuals found challenges in balancing the Site Coordinator role with faculty responsibilities. Some of these Site Coordinators also expressed concerns around tenure and promotion, as Site Coordinator responsibilities detracted from opportunities of greater value in academia. Those who were identified externally communicated challenges in finding their place within the TPP and cultivating relationships with faculty and candidates. In an effort to build these relationships, one Site Coordinator described their night adjunct position as a means to better connect with the program: *"one of the conditions of taking this position was I still wanted to teach at night as the adjunct because I know anyone who's in a school knows me and they've seen me in their school and I feel that it helps me be an advocate for the program"*

Funding for the Site Coordinator role was dependent on the member institution, with some sites choosing to use the funds provided by US PREP and others funding the position through internal financial streams. Despite being in the early implementation stages, both funding mechanisms left concerns about scaling and sustainability given the resource intensive nature of the Site Coordinator role.

The model is resource intensive and so we want to be really thoughtful about that in terms of the Site Coordinator piece. The Site Coordinator role is so tremendously important and the coaching and mentoring that they do and the liaison work that they do, the bridge work that they do between the university and the district and the campus and we want to really continue to build that and then, how do we fund that? So, that's going to be an ongoing thing to be thinking about. (Site 5 Program Leader)

Additionally, many Site Coordinators were concerned about their ability to continue the work, with fidelity, if their institution expanded partnerships with other K-12 districts but did not hire any more Site Coordinators.

We want to focus on quality and not quantity, so we were having the conversation, like, oh my gosh, I might get all these other students, so right now, as it is, we're spending good quality time with our 12, our 6 and 6, so when we have those pre conferences, those post conferences, it's really trying to not rush the things, but if you're going to have so many more that you're going to have to do. As we grow the numbers, so do the number of schools and how much time are you spending on the road and going to observe them because we can have the pre-conference on the phone. The post conferences have to be in person and of course, the observation, you have to be there. So, it's really making that time to make sure it's quality. (Site 11 Site Coordinator)

Some sites included planning for scale and sustainability early in implementation by conceptualizing different models for recruitment and training and by investing in data infrastructures to support the Site Coordinator throughout POP cycle data collection and reporting processes.

When we wrote it, we were having the funds support a Site Coordinator and a half and also an admin assistant because we were saying okay, some person, a full-time faculty where half of that person's salary would be funded by this and that didn't happen. So, in thinking of scale, we've been hearing the model that [another university] is using in terms of how they're also using field supervisors, but we're thinking of having full-time faculty. Our full-time faculty right now can serve, as part of their load, they usually have 3 courses per semester. One of those courses could be 10 candidates. Ten candidates equates to one course, so that's a way of where we're going to get... (Site 8 Program Leader)

The other thing I'd like to add is that US PREP is helping us create the infrastructure for our Site Coordinators to be collecting data and then using that data to inform their practice. For example, we have created a pre-observation discussion for the university supervisors to meet and discuss the lesson plans and there's a form for that and there's things that the university supervisor can be checking off to say this is what the teacher candidate has done and is

prepared to discuss and then that data goes to the Site Coordinator and she can use this to inform what she does in the seminar class later on in the semester, so we have forms for the pre-observation, for the observation, for the post-observation and those are giving that feedback to the Site Coordinators so that they can know what's going on, what are the needs of the teacher candidates and then be able to create a lesson to support the students. (Site 7 Program Leader)

Previously, mentor teachers were chosen by the K-12 school with little to no training or communication with the university. Though the selection of mentors varied across TPPs, it was more collaborative than in the past, allowing for both university and district standards to be part of the selection process. The role of a mentor teacher is to provide real-time, informal feedback for teacher candidates as well as the formal feedback required by the university. Outside of their organized duties, mentors also served as emotional support for the candidates and advocates when their workload was overwhelming.

To effectively carry out the role, potential mentor teachers were identified as individuals who would be flexible, nurturing, and patient as candidates learn and make mistakes in the classroom. Comfort with a co-teaching scenario and the ability to step back and instruct the candidate rather than intervene was vital (Sites 6, 7, and 10). Often, mentor teachers were identified as both highly effective in their classroom and greatly involved in other elements of the school (Sites 5 and 8). History of mentorship and experience in instructing classroom management and lesson planning was considered at Sites 8, 9, and 10.

You have to be flexible. You have to be like a parent also because it's like you're guiding them, but you also have to be able to give the time because they need it. It's a lot for them. We're mentoring them, but we're also their guide and other than their professors. (Site 6 Mentor Teacher)

Mentor teacher selection was conducted uniformly throughout the NYC sites, in partnership with the NYC DOE. Some teachers volunteered and K-12 schools were able to make recommendations, but final interviews and selections were made by the DOE and individual universities. Sites outside of NYC used the same approach, collaborating directly with districts to select mentor teachers.

For instance, in one site, Site Coordinators partnered with district principals to establish an application process for mentor teachers and to identify who would be a best fit for the program and each candidate.

[The Site] had a role in the selection of the candidates, so we did go sit on the interviews for our candidates, but specifically the selection was our Associate Superintendent and principals, so we already had an idea of who we might want and we did ask these teachers to come apply for these jobs, so it wasn't just thrown on them. And then from that list, that list was okayed and selected even further from our Associate Superintendent, our Chief Academic Officer, XX, just to ensure that we have that best environment and that we only chose people who had best practices or history of best practices, but also we thought we could nurture the new residents. (Site 10 K-12 Leader)

Site 9 was concerned that in expressing their expectations and desired qualifications for mentor teachers, they would offend K-12 representatives by implying that they had teachers that did not meet these requirements. A representative from US PREP successfully helped facilitate a conversation between this TPP and K-12 district, allowing the needs of both sides to be considered and met.

Prior to the school year, US PREP held training sessions for mentor teachers at every site. These trainings provided mentor teachers with information on coaching, co-teaching, and how to engage in different methods of feedback. The professional community that developed as a result of US PREP trainings served as a source of support for mentor teachers throughout the year (Site 7).

But what I see different is that there was no training and again, it was anybody could do it. There were no guidelines, expectations, whereas now, we have more guidelines, we had the training about co-teaching, which was very different than...you kind of got the idea that when they were doing their lessons, you have to sit and not say anything and now, it's all about teaching together and that's been so much more fun. I get bored sitting at my desk watching somebody else for a while, so does your student teachers, so to jump in and work

together has been so much better for the kids and for both of us because then we can play off each other. (Site 7 Mentor Teacher)

In addition to the initial US PREP training, Site Coordinators conducted regular trainings with mentor teachers. In these trainings, Site Coordinators were able to share scores from POP cycles and walkthroughs so the mentor teachers knew how to better instruct their candidates. These training sessions allowed mentor teachers to feel more efficacious and confident in their instruction with teacher candidates (Sites 5, 6, 7, 8, and 11). Mentor teachers also felt like they were more closely connected to the TPP. Mentor teachers at Sites 5 and 8 were also able to participate in a Beyond Diversity training, which helped expose and challenge internal biases, and in turn, informed classroom instruction.

So, during that mentor teacher training, I shared their scores, their walkthrough scores and their first pop cycle scores and a lot of them hadn't seen it. Most of them hadn't seen them. After that training, they're like, okay, well now I know how to best support my teacher candidate. Now, I know what area they're lacking and how I can support them, get better in that. (Site 10 Site Coordinator)

Despite the trainings, some mentor teachers still expressed a need for further clarification on their time commitment and role with the candidates (Sites 5, 6, and 9). Site 9 mentor teachers were initially only given a packet of information to read through, with little guidance on start dates and university expectations. One Site 5 mentor teacher was told that after the US PREP training in August they would be set for three years, only to be surprised by the scheduling of another training session for which they were not compensated. Once responsibilities were made clear, mentor teachers from Site 6 expressed a greater willingness to participate in trainings and meetings.

...There was nothing mentioned of this additional trainings and when we finished in August, we were told that we were good for three years and then they keep adding more requirements on our part. There was a Saturday training a couple weeks ago and some of us attended and some of us didn't for whatever reason and there was no compensation, the teachers were not paid that went. (Site 5 Mentor Teacher)

Exploration and Installation Drivers and Recommendations

The Exploration Stage requires the Implementation Team to conduct research on the site settings, culture, history, geography, and concurrent initiatives and values. This understanding and knowledge helps foster smooth transitions. More specifically, the purpose of the Exploration period is to assess and create readiness within the organization. The onus for the creation of readiness is on the Implementation Team, not on the actors who are expected to change. Adequate time must also be allowed for actors to process the changes associated with the adoption of an innovation and to consider their own needs within this early period of transformation.

The Installation Stage harnesses the findings from Exploration to build organizational capacity through staff training, coaching plans, and identifying performance and fidelity assessments. These groundwork-laying stages are critical to successful implementation. Findings from the Exploration and Installation Stages for Cohort 2 are similar to those for Cohort 1. Namely, there is a need for US PREP to fully establish readiness for change through extensive vetting and research, encourage more inclusive representation in initial application teams and during the interview process, and to create a comprehensive communication plan across stakeholders. Below, we elaborate on these recommendations.

Adopt a culturally responsive and equitable evaluation lens for Exploration activities.

Undergirding the extensive work of the Exploration Stage is ensuring a comprehensive understanding of the unique contexts, challenges, and histories of the institutions seeking to join the US PREP coalition. As such, EPIC recommends that US PREP adopt a culturally responsive and equitable evaluation (CREE) lens to their engagement with prospective institutions. The purpose of CREE is to engage stakeholders throughout the process of an evaluation through listening tours, advisory boards, and observations. For US PREP, this could mean a longer Exploration Stage wherein US PREP leaders encourage institutions to recruit a diverse set of stakeholders to share TPP histories, norms, demographics, and specific interests, needs, and assets.

More specifically, the six overarching principles of culturally responsive practices include:

- Understanding and recognizing broader context;
- Being responsive to the needs and perspectives of stakeholders and participants by engaging and partnering with them;
- Engaging in constant self-examination of values, biases, and assumptions that may influence aspects of the work;
- Recognizing and addressing the dynamics of power, privilege, and equity (or lack thereof) within systems, contexts, initiatives, and evaluations;

- Including shared life experiences within the work; and
- Applying culturally responsive practices at all stages of the work.

In grounding program transformation within CREE, US PREP and local implementation teams must ensure that systems/structures allow the voices of many stakeholders to be heard. Likewise, it is important for US PREP to identify and recognize the positive attributes and goals of TPPs. This helps to build buy-in, fit, and progress. Through robust data collection, including interviews/focus groups and observations, US PREP can develop a richer understanding of TPPs and their contexts. This understanding can enhance the impact of program transformation.

To further a CREE framework, EPIC recommends that US PREP continue to pursue the following strategies:

Support institutions in building a broader team of stakeholders in early application and interviewing stages.

As previously discussed, sites that included a broader range of stakeholders in the early application process and in convenings experienced greater stakeholder engagement and buy-in and smoother communication. Following CREE principles, EPIC recommends that US PREP support programs in building a broader team of stakeholders and partners at the earliest stages of Exploration.

Such work will include identifying which voices are heard (and are not heard) and altering structures and practices so that there is broader inclusion. Participants in this work could include deans, department chairs, clinical and tenure track faculty across departments, data managers, K-12 representatives, and teacher candidates. We recognize the logistical challenges and potential unwieldiness that including a larger number of partners may bring. However, broadening representation provides greater insight into the TPP context for US PREP, creates opportunities for concerns and questions to be voiced, and furthers engagement and buy-in of TPP and K-12 stakeholders.

Engage in extensive fact-finding and collaborative readiness.

We recommend that US PREP dedicate a period of time to ensure that the Implementation Team can meet with stakeholders and gain insights into their perceptions of the program and their community. Similar to Cohort 1 participants, Cohort 2 sites felt that US PREP did not fully understand or appreciate the contexts in which the transformation work was to commence. Competing initiatives or other grant-funded projects sometimes challenged stakeholders charged with implementing new changes. Likewise, at Site 7, faculty became concerned that their goals related to social justice and cross-departmental work were not compatible with or honored within the confines of the timelines set forth by US PREP. This finding may be attributable to time constraints that often led to a blending of the Exploration and Installation stages and truncated the important groundwork of contextual understanding.

Part of creating readiness within an organization is to collaboratively identify the need for change, with the primary Implementation Team fully informing the organization of the benefits and risks associated with the initiative. Based on the findings from the site visits, some participants from across the sites lamented the lack of knowledge and understanding about the transformation work. This is indicative of a lack of transparency on a broader scale, which can hinder readiness. Incorporating a mechanism for rapid feedback cycles that allows all stakeholders opportunities for input can help build understanding and readiness for change.

Create a consistent and inclusive communication plan.

Initial communication—between US PREP and sites, within sites, between sites and K-12 partners—was a challenge throughout the Exploration and Installation Stages. Part of the Leadership driver is for leadership and management teams to explore and adopt a proactive and responsive communication plan. The communication plan is a strategy to establish a clear definition of the transformation, promote feedback and collaboration across stakeholders, and develop processes for disseminating transformation plans to organizations and partners. The plan can also identify the face of the transformation, preferably a faculty member or program leader. It is critical for the communication plan to include feedback cycles, wherein leaders can share information in a timely fashion while seeking input from others. In doing so, structures must be in place to support gaining the perspectives of many stakeholders. In creating the communication plan, US PREP can also provide necessary trainings and resources for communication leaders who encounter pushback or tough questions about the transformation.

Gain clarity on adherence and model fidelity.

As an extension of communication, model fidelity and the degree to which programs adhere to US PREP's transformation model is a critical piece of both the Exploration and Installation stages. Details about the model need to be shared with stakeholders early on to ensure that sites are equipped with the knowledge and training necessary to move into later stages of implementation. US PREP's openness to model flexibility evoked mixed feedback from partner sites, with leadership from one site expressing concern about the difference between manipulating the model versus being flexible with it: *"I would say that the definition is required between flexibility and being manipulatable because there's flexibility, but I think, do you want a script and do you want a partner that's just going to be assenting to what you're going to prescribe."*

In comparison to Cohort 1, Cohort 2 was more flexible with model implementation. However, some sites argued that fidelity varied across aspects of the model, with US PREP being more flexible about certain pieces (residency) and less flexible with timelines and state limitations.

Ensuring that US PREP and the partner site have a mutual understanding of the degree to which model fidelity will be upheld, while still maintaining flexibility for the unique circumstances of the TPP will be essential to ensuring transformation success.

I don't think US PREP is really sensitive to the idea that we may not be able to do it as fully as they would like us to do, but they really are pushing that we do it that way and not being sensitive to if we are committed to this work and we do agree that pre-observations are helpful. Let us figure it out and it may not look exactly like the way that they want, but it is given all the dynamics of our institution and the state. (Site 7 Program Leader).



Conclusion

Through the perspectives of university and K-12 stakeholders, this report chronicles the implementation, challenges, and outcomes of early transformation efforts at seven Cohort 2 universities in the US PREP coalition. We grounded this report in implementation science, including the implementation phases and drivers, the role of US PREP as a primary implementation team, and a formula for implementation success. This framing provides a new lens through which US PREP—and their coalition members—can view their model and technical assistance.

Our site visits to Cohort 2 institutions occurred early in programs' engagement with US PREP. These visits allowed us to focus on the earliest stages of technical assistance implementation—Exploration and Installation—and the drivers pushing towards implementation success. From their engagement with US PREP, Cohort 2 stakeholders reported improvements in data structures and processes that strengthen program decision making and support for the transformed model, stronger relationships with K-12 partners focused on shared accountability for candidate success, and initial perceptions that transformed residency experiences benefit candidates' development. When comparing US PREP's engagement with Cohort 1 versus Cohort 2 institutions, we found that US PREP has adapted their technical assistance in several key ways, including engaging in earlier and more in-depth conversations about scale up and sustainability and allowing for greater flexibility in their preparation model to fit the needs, goals, and context of programs.

While most participants from each site considered engagement with US PREP as beneficial to program and candidate quality, there are several challenges for US PREP to address. In the earliest stages of implementation, stakeholders expressed concern over initial communication and US PREP's understanding of institutional context. Likewise, there were questions about model elements—e.g. what could funding be used for—and the tradeoffs between model flexibility and non-negotiable elements. At some sites, there were also challenges in garnering widespread buy-in for the work.

The Formula for Success illustrates the importance of not only successfully implementing the high-quality TPP model through purposeful technical as-

sistance but also the critical role enabling conditions play in supporting implementation. US PREP orchestrates both the model and their technical assistance, refining and adapting, as necessary. However, US PREP cannot necessarily manipulate all of the contexts and settings that foster this work. As such, it is essential for US PREP to continuously research, monitor, select on, or, if able, shape these enabling conditions. Such conditions include aligned motivations and initiatives, adaptive leadership, representative stakeholder buy-in, and complementary local and state policies. Much of this work can be addressed during the Exploration and Installation phases.

Building from our site visit findings and conceptual framework (Figure 3), we recommend that US PREP take the following actions to improve their engagement with programs in the Exploration and Installation stages. Improvements in these early stages can support a strengthened transformation experience. We recommend that US PREP:

- Adopt a culturally responsive and equitable evaluation lens for their Exploration activities. This includes understanding broader context; being responsive to the needs and experiences of stakeholders; engaging in self-examination of values, biases, and assumptions; and recognizing and addressing dynamics of power, privilege, and equity.
- Support institutions in building a broader team of stakeholders in early application and interviewing stages.
- Engage in extensive fact-finding with institutions to better understand context and collaboratively assess readiness for transformation.
- Create a consistent and inclusive communication plan—between US PREP and sites, within sites, and between sites and K-12 partners—that improves understanding of the transformation work and helps local implementation leaders effectively address concerns.
- Gain greater clarity on implementation timelines and aspects of the model that are flexible versus non-negotiable and then communicate this understanding to stakeholders. With shared expectations, US PREP and programs can better assess progress and room for growth.

As previously referenced, the stages of implementation are dynamic and do not necessarily follow a linear trajectory. That is, implementation teams—i.e. US PREP and local teams—can and should revisit early stages when they face challenges. US PREP and local implementation teams should continuously monitor, examine, and refine their implementation practices throughout transformation.

The findings from this qualitative report tell only portions of the Cohort 2 transformation story. This report will be used to provide more context for quantitative analyses of stakeholder surveys and candidate/graduate outcomes. Furthermore, this report can help inform subsequent data collection and data analyses with Cohort 2 institutions as they progress towards Full Implementation.

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