Lessons from the Field:
Best Practices for Piloting Curriculum

A common practice for districts adopting new instructional materials is to conduct a field test or a pilot to ensure the program meets the needs of stakeholders. Before conducting a trial run of potential new programs, we recommend first establishing the purpose and goals of the pilot. We find field tests work best when they are intentional, there are clear goals, and tools have been developed to capture evidence.

What is this resource?

We developed the guidance below from our experience working with districts across the country and from our own experience within school systems. We have also found the "Dos and Don'ts" from a group of districts known as Wisconsin's Cooperative Educational Service Agency #4 (CESA #4) to be interesting and helpful for districts to consider as they structure a field test as part of their curriculum adoption process. CESAs are districts that belong to a specific geographic region in Wisconsin and receive support from the state and regional offices both individually and as part of the regional cohort.

How should this resource be used?

If you decide that a field test is something your district will conduct, use the following recommendations and dos and don'ts to serve as guiding principles when developing your own field test. Your adoption committee should take time understanding what the lift will be for teachers participating so that they are able to communicate that to your stakeholders. Once the committee has a full picture of the scope of a field test and has created an evidence collection tool, then you might designate one or two committee members to lead the field test. Participating teachers will need a direct line to someone with full knowledge of the purpose and plan for the field test.

Pilot Recommendations

Recommendation	Considerations	District Example
1. Determine the purpose and focus for the field test.	What is it about the materials you can only learn by conducting a field test? What is the purpose of the evidence you'll collect from the field test? To: • assist in making a decision? • inform professional learning? • build investment? • all of the above?	A district decided that they wanted to learn about the usability of 2 standards-aligned programs they were considering. They already knew the materials had strong content but wanted to gather information about the usability by getting the materials in the hands of teachers. This would help them make a decision and would also inform professional learning once the materials were selected.
2. Develop review criteria and an evidence collection tool for field test participants.	Once you have determined the purpose and focus of the field test, participants will need to know what to look for specifically and have a way to capture the evidence they are collecting. This evidence will guide discussions after the field test has concluded. You may decide to include student survey data, in which case you also need to determine what information you would want to collect from students.	The focus of the district's field test was to look at whether or not the materials were "easy to use". When pressed to define what "easy to use" meant, the team emphasized that teachers had expressed the importance of lesson-planning and delivery as critical components of the new program. The team then developed specific

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		questions on which to gather data through the field test (e.g. how long does it take to plan a typical lesson?; are the lessons feasible to teach in a 55 minute period?) and created a simple rubric and a data collection tool in which teachers gathered evidence.
3. Identify what will be tested.	Your field test plan should be driven by what you want to learn from the materials, how much time it will take to collect the evidence desired and, finally, what lessons/units/modules will be used in the test. The field test should not interrupt student learning in any way. Teachers need to be able to see how students respond to new materials without sacrificing the knowledge and skills students are expected to gain throughout the year.	The district then selected 4 lessons from each of the 2 options they were considering. The 4 lessons from option 1 were tacked on to the end of an existing unit teachers were teaching on the same topic. The 4 lessons from option 2 were used as a preview for an upcoming unit on a related topic.
4. Design your field test.	To ensure a complete and consistent evaluation of the materials, and to reduce bias, participating teachers will need to see/use ALL program options being considered. This means if you are piloting 2 programs, every teacher in the field test sees both options for the same amount of	The district's field test ran for a total of 14 weeks. This gave teachers time to teach all of the selected lessons from both sets of materials, collect their evidence, and gather feedback from students regarding the

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	time. This will influence your overall timeline for the field test, so it's important to backward map from when you are planning to make a final decision.	new protocols in the sample lessons.
5. Select and prepare the field test participants.	Intentional and strategic selection of the teachers who will participate in the field test is critical to the success of the test. Make sure you are enlisting teachers who represent the diversity reflected in your community, a range of schools with varied needs and at various performance levels, and the range of grade-levels included in this adoption. Once the teachers are selected, ensure they are prepared to engage with the materials by providing training from the publisher or district staff familiar with the materials.	A district priority was that the field test include teachers from multiple grade levels (6-8), across a variety of schools, representing the diversity of students in the district. They developed an application for teachers to submit their interest in participating. One requirement was that they must not have used either set of materials in the past. The participating teachers then received an overview of the materials and specific planning guidance from the publishers at a one day training provided by the district.
6. Plan ahead for frequent check-ins with field test participants.	Provide opportunities for field test participants to engage with one another either in person or virtually to ensure they understand the tool and to calibrate their evidence collection.	Once a week, participating teachers were required to enter evidence based on the data collection tool developed by the committee. This allowed

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		the committee to see, in real time, the trends that were emerging from the evidence as well as illuminate the professional learning that would need to be addressed when the final decision was made.
7. Analyze and discuss data from the field test.	Finally, in order to come to an informed final decision, your committee should analyze the evidence that was collected during the field test and discuss how that data impacts the options you are choosing from. Does the evidence lean toward one program over another? How is that influenced by your priorities?	When all of the evidence from the field test had been collected, the district team sat down to look at the evidence and then determined how to plan for their consensus activities to surface the trends that became clear through the field test.

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Lessons from the Field

The educators in Wisconsin CESA #4 learned from setbacks and challenges throughout their pilot process. Consider this list of do's and don'ts as you create your own process to help set your district up for success and to avoid common missteps. Read more about the work from Wisconsin CESA #4 in the EdReports Case Study: *Big Changes in Rural Wisconsin: Improving the Instructional Materials Selection Process*.

CESA #4's Pilot Do's and Don'ts

Pilot Do's	- Identify a variety of participants. Agree on the characteristics that pilot participants should possess and then seek these teachers out. - Clarify how the pilot is attempting to differentiate between programs by creating review criteria in advance that will be used to evaluate the programs. - Run the pilot for an amount of time that will allow teachers to become familiar with the routines and instructional moves of each program. - Be strategic about which unit(s)/lesson(s)/module(s) you choose for the pilot. Choose lessons that are both representative of the curriculum and are high quality. Remember that even though you are piloting the curriculum, students will be engaging with the content. Keep in mind that whatever unit you choose should also fit into the current scope of sequence of instruction. - Provide prerequisite training up front to pilot participants that would be necessary to use lessons from a given program. For example, if the program relies heavily on the use of a specific teaching model, it would be important for piloting teachers to have an understanding of this. - Plan opportunities for the pilot participants to be observed by the pilot leads or coaches. These observations are intended to

	collect data related to the identified review criteria and to help identify implementation barriers.
Pilot Don'ts	• Allow teachers with a strong bias for one program over another to be part of the pilot. • Use a pilot to build buy-in. Your adoption process should be comprehensive and transparent. Transparency begins with clear communication from the beginning regarding the purpose of the pilot and the role the evidence will play in the decision. Build buy-in by being transparent and involving a variety of stakeholders. • Judge the quality of a program solely by the changes in practice it requires of the pilot teacher. It's important not to paint implementation challenges with the same brush. Challenges could be due to necessary shifts in instruction in order to meet the demands of state standards which require shifts in practice that many educators find challenging. The materials could also be unwieldy or illuminate gaps in content knowledge over time that can only be addressed through professional learning. • Don't use a pilot to gather student achievement data. Student voice is important here, but the focus should be on their experience.

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