

**Developing System-Level Capacity to Support Local Instructional Reform:  
The Case of One Large-Scale School Improvement Initiative**

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“Great things are done by a series of small things brought together.”  
Vincent Van Gogh



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To Dave, Abby, and Derek,  
whose lives got flipped  
turned upside-down

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## **LIST OF ACRONYMS**

MiBLSi.....	Michigan’s Integrated Behavior and Learning Support Initiative
MTSS.....	Multi-Tiered Systems of Support
DIT.....	District Implementation Team
RFPS.....	Regional Focus Planning Session
HELP.....	Higher Education Learning Partners
TAP.....	Technical Assistance Partners
ISD.....	Intermediate School District
TAG.....	Technical Assistance Group
PBIS.....	Positive Behavioral Interventions and Supports

## **ABSTRACT**

In this era of accountability-driven, standards-based education policy, learning to develop system-level leadership capacity to prepare schools for instructional reform is imperative in advancing school improvement work. The investigation of school improvement networks increases awareness of how network-based consultants can facilitate the implementation of instructional practices in local contexts. Understanding how these consultants operate and which competencies are beneficial to their enactment of the role informs the field about building local capacity for instructional improvement.

This case study of one large-scale school improvement initiative examines the organizational designs for the practice and guidance of network-based consultants, the interpretation and enactment of their role, and the initiative's continual improvement process vis-à-vis the design and support for this work. This study comprises data gathered through observations, interviews, and documents.

The analysis of these data draws on Feldman & Pentland's (2003) ostensive and performative aspects of organizational routines. The ostensive defines what, ideally, the routine comprises; the performative is the execution of the routine in context (Feldman & Pentland, 2003). Spillane (2005) broadened these concepts beyond routines, noting that "ostensive and performative distinctions can be applied to other aspects of the situation, including structures and tools" (Spillane, 2005, p. 148). Following suit, I expand the ostensive and performative dichotomy to the designs for, and guidance of, practice.

Through this analysis, I identified the most highly privileged functions of this consultant role as the organization and co-facilitation of local implementation teams and

effective communication. Extending this finding, the most highly favored competencies for coordinators are communication, interpersonal skills, and content knowledge. These results reflect an emphasis on building the capacity of local districts to implement and sustain the improvement model within their contexts. The most highly privileged modes of guidance emerging from this analysis are interactive, human resources that allow for real-time, individualized support.

Additionally, I expose challenges that the initiative faces due to the lack of an organized system for continuous improvement, and I suggest ways for the organization to be more deliberate and efficient in gathering and using feedback to improve the design and guidance of the consultant role.

## CHAPTER I

### INTRODUCTION

#### Statement of the Problem

Numerous studies over the past two decades have documented the significance of school-level leadership on instruction (Bryk, Sebring, Allensworth, Luppescu, & Easton, 2010; Elmore, 2000; Heck, 1992; Hallinger & Heck, 1996; Leithwood & Riehl, 2003; Muijs & Harris, 2003; Stein & Nelson, 2003). However, since the historical norm for educational leaders has been to manage the structure and administrative processes of schools, the expectation of instruction-focused leadership moves the field into uncharted territory. School leaders are now expected “to assume responsibilities they are largely unequipped to assume” (Elmore, 2000). While increasing student achievement is a common objective among school administrators (Gelb, 2004), since educational leaders largely emerge from within the field of education as it *has been*, they have not necessarily had the opportunity to learn how to lead instruction toward what it *could be*.

This body of research illuminates the importance of developing the capabilities of advisory personnel to assist school leaders in directly supporting instruction and in cultivating an improvement-focused academic environment as a key issue in this era of accountability-driven, standards-based education policy. These system-level agents provide the opportunities, capacities, and incentives for local educational leaders to develop the new and specific skills required to engage in instructional supervision and to direct large-scale, schoolwide reform (Farrell G. , 2003; NCLB Legislation, 2001).

In her review of Comprehensive School Reform research, Desimone (2002) found consensus among multiple studies that district-level support is vital to the sustainability and scale-up of comprehensive reforms. Berends, Bodilly, and Kirby (2002) also identified this need in their summary of a series of RAND studies on the implementation of the New American Schools initiative, in which they found that system-level coherence – that is, alignment of opportunities, capacities, and incentives for improvement at the state, district, and school levels – is an important factor in embedding school improvement processes into a school’s culture, improving the chances for enduring success.

However, a barrier to this shift in both the paradigm and practice of educational leadership is the historical novelty of operationalizing this type of role reorganization. This restructuring demands the expansion of current knowledge, methods, and programs to support system-level advisors in developing the capabilities to provide significantly deeper and more coordinated practice-focused support to schools than ever before. School improvement networks are external organizations that offer technical assistance to schools and districts as they work to restructure their organizational focus and build their capacity for effective instruction.

Learning how large-scale, network-based school improvement initiatives develop leadership capacity at the system levels to prepare schools for instructional reform is imperative in moving school improvement work forward. The close investigation of such networks will increase our understanding as to how network-based specialists can facilitate the weaving of improved instruction into the cultural fabric of schools and districts. Research in this arena will inform the development of strategies for replicating and sustaining the school improvement process on a large scale. In this dissertation study, I observe one initiative that aims to build the capacity in local schools and districts to undergo systemic changes toward improving student learning.

In Chapter II, I provide a comprehensive review of research that attends to the fields of accountability in schools and districts, the evolving roles of school-level and system-level leaders, the structure and function of school improvement networks, and organizational learning in the context of school improvement initiatives. This review also exposes the need for further research on developing system-wide capacity to support local educational reform, the arena in which this dissertation study is situated.

### **Purpose of the Study**

To complete a dissertation that contributes to the field of school improvement not only intellectually, but on a practical, usable level was highly important to me as I embarked on this project. Honoring that priority, I conducted this research with the following two objectives in mind. First, I set out to learn whether and how the enacted practice of network-based support agents aligns with an initiative's vision for their role, in the interest of improving the cohesion between the intended design and enacted practice of systemic support to districts and schools. This learning can influence the refinement of both the design and the interpretation of this essential function within this type of initiative and may serve to inform the successful introduction and development of this role in large-scale school improvement initiatives.

The second objective of this study is to learn how a large and complex, hub-based organization engages in continuous improvement. Carefully observing and analyzing how an initiative collects, processes, and applies feedback from multiple sources can inform the ways in which similar enterprises approach the of their feedback loops to increase the efficiency and efficacy of their organizational learning cycles.

To these ends, I have carried out a single-site case study that investigates the following aspects of a particular large-scale, network-based school improvement initiative:

- the specific designs for the day-to-day practice of network-based consultants within the system, along with the

guidance provided to support the implementation of those designs

- the interpretation and enactment of these designs and guidance by role incumbents
- the use of the feedback toward the improvement of the designs and guidance for the network-based consultant role and system-level organizational learning

By developing a deep understanding of the role of network-based change agents, both as designed and as enacted, then examining the similarities and divergences between the two, I am able to separate the wheat from the chaff in terms of actual role tasks and priorities. Knowing where and how design and performance diverge can enlighten the potential reconceptualization of the blueprints for practice and the support thereof, and will guide a more effective introduction of this type of role in other initiatives.

Long-term success for school reform partnerships can stem from a model in which the school improvement initiative and the local school districts share feedback with one another, both to increase achievement in the schools and to improve the capacity of the initiative to support school improvement. Organizational learning is enabled by the observation and analysis of any gap that exists between the design of an initiative and its execution.

## **Study Design**

### **Setting**

A promising context for studying the efforts toward developing system-level capabilities to support local instructional reform is a large-scale, network-based school improvement initiative. The program under study for this dissertation is Michigan's Integrated Behavior and Learning Support Initiative (MiBLSi), a large-scale, network-based school improvement initiative sponsored by the Michigan Department of Education Bureau of Special Education and the U. S. Department of Education Office of Special Education

Programs. Through the implementation of a Multi-Tier System of Support (MTSS), MiBLSi aims to focus special education resources on those students who are most in need of them by effectively reorganizing schools around a specific, research-based school-wide behavior and reading intervention plan.

According to Fullan (2000), there are three types of large scale reform: (1) whole school reform that includes all schools in a district; (2) whole school reform with hundreds of schools implementing a particular model of change; and (3) state and national initiatives in which most or all of the schools in a state are involved. MiBLSi falls under the first two categories, in that it is a whole school reform effort that involves multitudes of districts enacting MTSS – a specific framework for improvement – in all of their schools. MiBLSi strives to embody the third type of reform, to become embedded in state policy and impact instruction in all of the schools within Michigan.

**Multi-Tier System of Support.** MTSS is a framework in which schools enact a three-tiered system of instructional and behavior management strategies to address the needs of every student. To start, high quality, research-based instructional and behavioral strategies are introduced to all students (Tier 1). Once those structures are in operation, teachers are empowered to use outcome data to identify those students who continue to struggle behaviorally and/or academically, and support them with additional, more intensive classroom-based strategies (Tier 2). Schools initiate specialized services (Tier 3) only with those students whose challenges continue, even after Tier 1 and Tier 2 classroom supports have been implemented in earnest and with fidelity. This model is intended to maximize the efficient use of Special Education services and resources because most students are able to find success at Tier 1 and Tier 2, which allows the school to identify those students who truly need Tier 3 support beyond the regular classroom environment. MiBLSi currently supports

MTSS programs in literacy and behavior management; plans to add models for math and early childhood into the fold are under development.

To implement a complex and comprehensive school- or district-wide system such as MTSS requires a great deal of readiness work. MiBLSi endeavors to guide local education agencies through a purposeful implementation process with the assistance of regional MTSS coordinators. Employed by ISDs (Intermediate School Districts) or RESAs (Regional Educational Services Agencies)<sup>1</sup> and trained by MiBLSi, MTSS coordinators are network-based consultants who provide implementation support to local districts, facilitating the development of local capacity to sustain MTSS.

**MiBLSi's structure.** MiBLSi is structured around a cascading model of support, in which personnel at each level of the system guide and support those directly beneath them. While I unpack this model in detail in Chapter III (See Figure 3.2: MiBLSi Statewide Cascading Structure of Support), I offer an introductory overview here in order to situate the key players included in this study.

The MiBLSi professional learning model is designed like a staircase, with each step representing a different level of the system. At the top of the staircase sit the MiBLSi Core Leadership Team and the stakeholders at the Michigan Department of Education. Continuing downward, the steps represent Regional Technical Assistance Partners, ISD Leadership Teams, District Implementation Teams, Building Leadership Teams, School Staff, and finally students. Individuals at each level of the organization are responsible for supporting the work and developing the capacity of those on the subsequent step. MTSS coordinators are situated toward the middle of the staircase, at the ISD level; they are directly supported

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<sup>1</sup> ISDs and RESAs are organizations that provide support at a county level to public districts, charter schools, community colleges, and other educational settings with functions such as transportation, special education testing, social services, and psychology. Many of them operate alternative educational opportunities, such as technical schools and special needs programs, and tutoring for incarcerated youth. They also provide professional development opportunities for educators and consultants around instructional improvement.

by the Regional Technical Assistance Partners and provide implementation guidance to local districts (District support model report, 2013).

## **Research Questions**

In the context of this structured systemic school improvement initiative, my aim was to understand the specified vision for the MTSS coordinator role and to observe the mechanisms involved in translating this vision into enacted practice. I also sought to witness the processes through which MiBLSi evolves as an organization, based on the successes and challenges of implementation. Through the investigation of these operations, I gained insight into the development of new knowledge to guide innovative forms of leadership practice, the work of replicating and activating that knowledge among leaders across the system, and the use of feedback to improve the support of these leaders in their work.

MiBLSi's design includes both a strategy for the development of system-level capabilities to support the local implementation of instructional reform and a systematic process for feedback and organizational learning. To analyze this initiative's policies and processes, I empirically investigated three broad sets of questions.

The first two sets of questions framed my investigation of the development of local capacity through the support of network-based agents:

Within a large-scale, network-based school improvement initiative,

1. What are the specific designs for the day-to-day practice of network-based consultants? How do the documented and voiced representations of these designs align with one another? What competencies are privileged in these representations of the designs? What guidance is provided to support the implementation of these designs and the development of these competencies?
2. How do role incumbents interpret and enact these functions, competencies, and guidance? What variation exists, if any, between the role incumbents' interpretations and enactments and the design for practice?

The first set of questions investigates the specified design of the MTSS coordinator role and the plan for guiding them through it. That is, it asks what MTSS coordinators are supposed to do, and how MiBLSi intends to help them do it. The next set of questions focuses on the performance aspect of the role. It speaks to how MTSS coordinators view their role, what they actually do in practice, how that compares to the design, and what might account for any discrepancies between the two. This learning will be important in understanding what the real-life priorities of the MTSS coordinator role is, which will be instrumental in informing any redesign of the blueprint for practice or reorganization of supports. It will also allow for more efficient adoption of this model for other initiatives.

In the interest of discovering the process for organizational learning employed by a large-scale school improvement initiative, based on feedback loops regarding the work of its network-based consultants, I posed and addressed the following question:

3. How does the organization collect, process, and apply feedback for the continuous improvement and refinement of the role expectations and support of the network-based coordinators?

This question extends the first two sets by investigating MiBLSi's feedback loop, particularly as it relates to the MTSS coordinator role. It asks how MiBLSi gathers input about the MTSS coordinators' practice, and examines how MiBLSi uses this information it gathers to make systemic improvements vis-à-vis the role specifications and support mechanisms.

## **Methodology**

I addressed the above questions through a single-site, embedded case study of MiBLSi's effort to develop leadership capabilities at the ISD/RESA level, in support of local instructional improvement. Contrary to a large controlled, randomized experiment, this qualitative case study design enabled me to address the *how* and *why* research questions in the contemporary context of a pre-existing initiative, over which I had no control as a

researcher (Yin, 2009). This methodology allowed me to observe closely a small number of intermediate-level managers within the system and gain a rich and detailed understanding of how they prepare for, interpret and enact their roles.

For this study, I examined the development of capabilities within intermediate-level managers in the support of large-scale systemic school improvement. Specifically, I spent a year observing the work of MiBLSi MTSS coordinators in three similar regional systems: two ISDs and one RESA. I interviewed the MTSS coordinators about their role conceptualizations and practices and I interviewed the people within MiBLSi who designed their role and who support their work. I also observed MiBLSi-conducted training sessions and analyzed documents pertaining to the MTSS coordinator role definition and support for their practice.

This contextualized case study will contribute to the greater body of school improvement implementation literature by offering evidence of some of the practices and problems that lie within systemic instructional reform. It will offer corroborating and/or dissenting evidence to advance theories about the relationship between the formal expectations and the lived experiences for regional consultants and about engaging in continuous improvement within hub-based instructional reform initiatives. Just as each dab of paint enriches an impressionist tableau, each fragment of knowledge gathered through research strengthens the broader theoretical base. This small case study will refine and enhance the fields of school improvement and organizational learning through its specificity (Moss & Haertel, 2015; Tsoukas, 2009; Yin, 2009).

In Chapter III, the reader will find a thorough depiction of the embedded case study research methodology that I used to structure this study. This description of the research design includes sample selection, data collection and analysis methods, research process, ethical concerns, and limitations.

## **Preview of the Findings**

With the intent of piquing interest and foreshadowing the narrative, but without prematurely delivering the punch lines, I introduce here a brief summary of the findings associated with each research question. Providing complete details of the analysis and conclusions, Chapters IV, V, and VI serve to formally present the findings of the study. In each of these chapters, I conduct an in-depth examination of one of my research questions, making assertions based on data I collected and analyzed during the study. Chapter VII brings the previous three chapters together, presenting patterns and overarching themes that cut across the three sets of research questions. In this final chapter, I also present implications of this study's findings, the contributions it makes to the greater body of research literature, and potentially fruitful directions for future research.

### **Findings: Design for Practice**

The first set of research questions present an inquiry about the specific designs for practice for MTSS coordinators and the guidance that is provided to enact them. As intended, the MTSS coordinator role is highly complex, requiring a strong knowledge base in MTSS content and the implementation process. To carry out the role effectively, MTSS coordinators are expected to embody a diverse ensemble of skills, both technical and relational. To support MTSS coordinators in completing the multitude of important tasks, and in developing the requisite aptitudes to perform them well, MiBLSi has developed an extensive, multifaceted system of support on which MTSS coordinators can draw.

In their voiced representations of MTSS Coordination – that is, how they view the role in action - MiBLSi's leaders as a group privilege a subset of the elements of practice and the competencies associated with them. The challenge that lies ahead is to reconstruct the doctrine and the designed support for the role to reflect the real-world priorities of its architects and its incumbents.

### **Findings: Interpretation and Enactment of Practice**

A companion to the first set of research questions, this set of questions sets up the investigation into how the MTSS coordinators interpret and enact the role functions, how they draw upon knowledge and skills to carry them out, and how they use the provided supports to enhance their practice. These questions also take up how these interpretations and enactments compare with MiBLSi's design for practice.

In this analysis, I found that MTSS coordinators, like the MiBLSi leaders, tend to privilege certain elements of the indoctrinated practice in their operational representations of the role. While some of these priorities align with the design for practice, there is also some dissonance between the role as it was designed and the role as it is lived. In the work ahead, it will be important for MiBLSi to determine whether the program's ostensive priorities will align with those of the architects or those of the practitioners.

### **Findings: Continuous Improvement**

The final research question frames the examination of how MiBLSi collects, processes, and applies feedback regarding the MTSS coordinator role. My observations and analysis have revealed that MiBLSi collects feedback in multiple formats, both formal and informal, on a regular basis. This feedback comes from both internal and external sources. MiBLSi staff members meet regularly to formally process feedback and data, but the project also engages in ongoing informal analysis, with incoming feedback following a variety of paths, depending on its source and content.

This question also addresses how MiBLSi uses information gathered about MTSS coordination to improve the design and support of the role functions. Because they interact with feedback on such a regular basis, MiBLSi leaders are continuously using this information to adjust their support of MTSS coordinators in the flow of the work. The organization has identified two broad areas for organizational growth regarding the role

specifications and the system of supports for MTSS Coordination, and has begun the process of addressing those issues.

### **Desideratum**

I have organized the remainder this dissertation with the aim of guiding the reader efficiently through the study, from its theoretical foundations through its implications for action. It is my great hope that each reader will come away from this experience with new and relevant knowledge, deep questions, and ideas for practical application. I expect that the variety of perspectives that readers contribute to their interactions with this work will bring out diverse ensembles of understandings, queries, and insights. It is this collaboration between the reader and the writing that will elevate the richness of this dissertation and bring the work to life.

## **CHAPTER II**

### **LITERATURE REVIEW**

In this chapter I tell a story shaped by the instructional improvement literature, beginning with a depiction of the policy environment that drives educational reform, through the changes in school- and system-level leaders' roles in the wake of evolving policies, to models for systemic support to build the capacity of these leaders to accommodate shifting expectations. I situate this dissertation study among others that examine prominent large-scale school improvement networks and how they pursue the development of local capacity for innovation, as well as how they leverage their relationships and interactions with schools and districts toward organizational learning. That said, this chapter functions merely as an introduction to the relevant literature and its relationship with this study; throughout the dissertation I continue to weave pertinent prior research into the discussions of my investigation and my findings.

#### **Era of Accountability**

With the proliferation of state and federal educational funding and accountability initiatives, schools and districts are increasingly expected to show ongoing improvement in student achievement. Sweeping federal educational reform initiatives, most notably the No Child Left Behind Act of 2001<sup>2</sup> and the Race to the Top Grants that began in 2010, have put the onus on schools and their leaders to demonstrate student achievement and growth at unprecedented levels. Layering on to those expectations, states are placing high-stakes responsibility on schools and districts for improving student outcomes (Betts, 2005). These

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<sup>2</sup> The Obama Administration's reauthorization of the Elementary and Secondary Education Act of 1965 is a revision of the No Child Left Behind Act of 2001.

federal and state initiatives hold schools accountable for measurable student improvement in a variety of ways, including, for example, public evaluations and rankings, institutional reconstitution, obligatory supplemental services, and the nullification of graduation standards (Betts, 2005; Payne, 2008). Continued failure to demonstrate Adequate Yearly Progress (AYP) negatively impacts a local district or school's autonomy over resource allocations, governance, and staffing (NCLB Legislation, 2001).

Research has revealed that schools with a collective focus on instructional practice have demonstrated high achievement across a broad range of students (Schmidt, McKnight, & Raizen, 1997; Stigler & Hiebert, 1999). Drawing on this evidence, the standards and accountability movement shifts the primary function of school leaders away from the management of educational organizations and structures and toward the direct supervision of instructional practice (Elmore, 2000; Hess, 2005). Policymakers, reformers, and researchers are moving beyond the expectation that money and motivation will improve student outcomes, and are embracing the reality that engaging in the “fundamental overhaul of instructional practice” (Rowan, Correnti, Miller, & Camburn, 2009, p. 637) and transforming the structure and function of educational leadership foster the conditions for increased student achievement.

### **Evolving Role of School-Level Leaders**

As evidenced above, one important way for educational leaders to move their schools and districts forward in this era of greater accountability is to reconceptualize their roles from managers of educational organizations to active collaborators in the management and improvement of instructional practice. Many scholars are in agreement that school leaders have an impact on instructional practice (Bryk, Sebring, Allensworth, Luppescu, & Easton, 2010; Elmore, 2000; Hallinger & Heck, 1996; Heck, 1992; Leithwood & Riehl, 2005; Muijs & Harris, 2003). As they set up the conceptual framework for their extensive analysis of

Chicago Public Schools, Bryk et al (2010) iterate the common finding that, from the reform perspective, a principal's main concern is the improvement of instructional work in classrooms.

This recognition of the impact of building-level leadership on instruction is reflected in the expectations of a number of major reform efforts. For example, the Consortium on Chicago School Research has identified Instructional Leadership as one of its *Five Fundamentals* for school improvement (Payne, 2008). Likewise, the Boston Public Schools Whole-School Improvement Plan lists Instructional Improvement as the first of its *Six Essentials*, and delineates the expectation that principal-headmasters will participate in instructional activity on an ongoing basis (Reville & Coggins, 2007). However, the shift toward instructional leadership may be easier said than done. Farrell (2003) suggests that achieving the balance between instructional leadership and administrative management is so complex that the most feasible solution is to distribute the roles between two or more people.

Engaging in instructional leadership involves an expansion of the school leader's focus, adding direct involvement in the technical core of instruction to the administration of the school organization. The school leader is therefore charged with establishing and fostering a context within which effective instruction can be developed and sustained (Schnur & Gerson, 2005). It has become incumbent upon the school leader both to have a direct influence on the improvement of instruction at the classroom level and to establish the environment in which that instructional improvement is universally achievable.

The creation and maintenance of a school environment that promotes instructional improvement is critical in successful reform leadership. Multiple studies have provided evidence that the establishment of a normative environment around instructional practice is a common element among schools that have demonstrated instructional improvement (Berends, Bodilly, & Kirby, 2002; Bryk, Sebring, Allensworth, Luppescu, & Easton, 2010;

Hightower & McLaughlin, 2005; Russo, 2004; Schnur & Gerson, 2005). Hallinger and Heck's (1996) comprehensive review of research on the principal's role in school effectiveness cites several studies that describe the principal's function as "sustaining a schoolwide purpose focusing on student learning" (p.38). In their review of educational leadership literature, Leithwood & Riehl (2003) identify "providing direction and exercising influence" (p.2) among the functions of leaders, along with working collaboratively to create a shared purpose and direction focused on student learning.

A vital element in creating an environment that encourages instructional improvement is supporting the professional development of those who engage in classroom instruction. Anthony Alvarado, Superintendent who directed the sweeping, system-wide Blueprint for Student Success reforms in San Diego, stated that the principal's "primary responsibility is to ensure that there is high-quality adult learning going on in your building that results in changes in [teacher] practice that result in kids learning more" (Schnur & Gerson, 2005, p. 94). Stein and Nelson (2003) agree, portraying leaders' functions in instructional improvement as indirect, identifying the core responsibilities of school leaders to be "to know strong instruction when they see it, to encourage it when they don't, and to set the conditions for continuous academic learning among their professional staffs" (p.424). Leithwood & Riehl's review (2003) reveals additional support for that finding: while school leaders have a strong effect on student learning, their influence is not as directly powerful as that of curriculum and teacher instruction. The leader's impact comes through fostering the strong instructional practice of teachers.

As it is not feasible for schools to shut down midstream and reorganize to accommodate these new expectations, local educational leaders are charged with directing and managing the transformation process during the course of teaching and learning. This reorganization requires shifts in stakeholders' concepts of schooling, in leaders' attention

from organizational structure to instructional practice, in teachers' enactment of instruction, and students' demonstration of achievement, all occurring simultaneously and in step with the educational process. Studies of initiatives such as the New American Schools and San Diego Public Schools' Blueprint for Student Success demonstrate that attempting to change the core structures and behaviors of an organization, especially when multiple levels of leadership and a diverse population are involved, is a most demanding task to realize (Berends, Bodilly, & Kirby, 2002; Hannaway & Stanislawski, 2005; Hightower & McLaughlin, 2005).

### **Evolving Role of System-Level Leaders**

To enact large-scale instructional reform, school-level leaders need opportunities and support to acquire the new skills necessary for its implementation. Policymakers have created a new paradigm for school leadership without providing all of the guidance or tools to effectively enact the imposed changes. The problem then, as Elmore (2004) articulates in his assessment of the implementation of Chicago's 1988 school reform, is that "Changing the organizational and governance structure around [teachers' and administrators'] practice simply means that they don't know what to do in a different structure; it doesn't change the state of their knowledge and skill." (Elmore, 2004). Elmore (2000) also posits, in his discussion of the evolution of school leadership, that transformation occurs "not by continuing to do what we know how to do more intensively and with greater enthusiasm, but by *learning new things*" (p. 19). Providing school leaders with the support they need to develop the new skills and knowledge for managing instructionally-focused reform will better their chances for meaningful and sustainable change.

Reforming educational leadership at all levels is an important step toward sustained and successful improvement in schooling. As the scope and complexity of this type of reform is historically novel, a key issue in this accountability-driven policy environment is the

development of the capabilities of personnel at higher levels of the system (e.g. state, regional, and local education agencies) to support school-level improvements. However, engaging system-level leaders in profound change at the district and school level is an intensely challenging new endeavor and warrants a reform agenda of its own (Hightower & McLaughlin, 2005).

While higher-level education agencies have introduced standards and enforced accountability at the local level (Farrell G. , 2003), evidence suggests that developing capabilities in these agencies to provide technical assistance to schools is very difficult (Berends, Bodilly, & Kirby, 2002; Hightower & McLaughlin, 2005; Neufeld, 2007). The breadth, depth, and complexity of this type of assistance are also historically novel. The capability to support comprehensive improvement in large numbers of schools has only begun to emerge in state, regional, and local education agencies in the past two decades, since federal programs such as No Child Left Behind and Race to the Top began to place unprecedented onus on system-level agencies to assist schools in improving instruction and demonstrating student achievement and growth.

A number of externally-sponsored, large-scale change enterprises, such as the design teams sponsored by the New American Schools initiative and the recipients of Investment in Innovation (i3) Grants, have set out to support education agencies at all levels in developing capabilities to provide such technical assistance (Berends, Bodilly, & Kirby, 2002; Investing in Innovation Fund, 2013). New American Schools, founded in 1991, was a component of America 2000, a sweeping educational research and reform initiative supported by President Bush (Glennan, 1998). A comprehensive study of New American Schools demonstrated that schools with ongoing, whole-school design team support experienced greater success in implementing the program than those left to interpret and implement the design on their own. (Berends, Bodilly, & Kirby, 2002; Payne, 2008). Another study that looked at the first six

years of New American Schools' presence in the school improvement landscape discovered that while a strong design is common among high quality schools, design-based assistance alone was not enough to instigate meaningful instructional change. Technical assistance was also needed for effective and sustainable implementation to occur (Glennan, 1998).

Supporting these findings from the contrary perspective, a study of 31 New Jersey school districts that had unsuccessfully attempted to enact a variety of reform initiatives reported "inadequate support from the program developer" and "inadequate support from the state department of education" as two of the four main inhibitors to successful implementation (Payne, 2008). Additionally, an analysis of the minimally successful Coalition of Essential Schools model discovered that an important flaw in its implementation was the intentional lack of an institutional support structure in favor of school-level autonomy (Payne, 2008).

Guiding the effective enactment and maintenance of school improvement initiatives will depend on the generation of new knowledge surrounding the development of appropriate capacities in system-level leaders to support, implement, and manage sustainable change in the midst of teaching and learning. For that development to occur, it would be of value to know how to characterize successful system-level leadership, improve system-level leaders' performance, and recreate effective practices. It would be worthwhile for initiatives seeking to foster this type of leadership at scale to create provisional designs for practice at the system level and engage in their continuous improvement. Through this dissertation, I aim to contribute to the body of knowledge that addresses these matters.

## **Building Local Capacity for Instructional Improvement**

### **Relevance of Local Capacity**

Across the school improvement literature, local capacity to enact an initiative is shown as critical to effective and sustainable implementation. It has been recognized across

studies that standards and incentives are insufficient mechanisms for instructional improvement unless coupled with the development of local capacity to successfully put initiatives into practice (Bryk, Sebring, Allensworth, Luppescu, & Easton, 2010; Elmore, 2004; Fullan, 2000; Marsh & Crocker, 1991; Massell, 1998; Spillane & Thompson, 1997). As Tucker, Nembhard, and Edmondson (2007) articulate, “Believing that it is a good idea to implement a new practice does not mean one knows how to use the practice, nor how to use it in a given context” (p. 24). This comment highlights the critical role of effective implementation that includes developing local capacity toward the success of new initiatives.

Bolstering the case for building local capacity to support instructional improvement, McLaughlin (1987) argues that two broad factors, capacity and will, contribute to policy success. She asserts that capacity can be addressed through training and funding, while will – the underlying motivation for implementing a new strategy - is more resistant to policy intervention. It would seem, then, that the most beneficial path to successful implementation is to focus on that which can be changed: the local capacity to enact the initiative. Bryk et al (1999) share the discovery from a landmark study of reform in Chicago Public Schools that “New systemwide capacities were needed to further advance reform...this capacity building is a need for a new extra-school infrastructure to promote improvement” (Bryk, Hess, Mirel, & Wong, 1999, p. 87).

In their 2009 report of a five-year empirical study of three nationally active CSR programs, Rowan, et al. looked at designs for strategies used to promote instructional change within schools. They investigated whether and how these designs were associated with organizational and instructional changes. Through this study, they discovered two factors common to the successful outcomes of externally-developed programs in schools: effective instructional design and sound implementation strategy. They found that either a weak instructional design or an ineffective implementation strategy resulted in the failure of the

innovation, and that both strong design and sound implementation were necessary for successful outcomes (Rowan, Correnti, Miller, & Camburn, 2009). Blase (2012) supports and extends this view, describing the following multiplicative equation:

$$\textit{Effective and Usable Interventions} \times \textit{Effective Implementation Methods} \times \textit{Enabling Contexts} = \textit{Socially Significant Outcomes}$$

In this model, if any of the contributing factors - strong intervention, sound implementation, or local capacity - is absent (i.e. has a value of 0), the product, or outcome value, will be 0 and the intervention will fail (Blase K. , 2013).

In their review of studies on comprehensive middle school reform in California, Marsh and Crocker (1991) observed that “State departments of education which developed collegial relationships with districts and whose efforts were integrated within departmental structures were more likely to increase local capacity for change” (p.261). Bryk et al (2010) include local capacity-building as one of the four essential elements of external reform, along with decentralization, external accountability, and stimulation of innovation.

Elmore (2000) describes the significance of developing capacity as a non-negotiable responsibility of leadership:

If the formal authority of my role requires that I hold you accountable for some action or outcome, then I have an equal and complementary responsibility to assure that you have the capacity to do what I am asking you to do (p. 21).

Fullan (2000) reinforces the importance of local capacity in his description of the pitfalls encountered particularly in the 1970s, the early years of educational reform initiatives, when

There was actually great pressure and incentives to become innovative, and this resulted in many schools adopting reforms for which they did not have the capacity (individually or organizationally) to put the reforms into practice. Innovations, thus, were adopted on the surface with some of the language and structures being altered, but not the practices of teaching (p. 6).

Per this depiction, innovation without capacity-building results in superficial changes in practice and lacks the depth needed for durable, meaningful evolution of the ways in which educators approach teaching and learning.

## What is Local Capacity?

In order to fully comprehend what it means to develop local capacity, it is important to establish a clear understanding of what it is. However, while local capacity is a commonly used concept within education reform research literature, I have found it difficult to pin down a concrete and consistent definition. Spillane & Thompson (1997) agree, saying that “Commentators frequently use ‘local capacity’ somewhat loosely, including under this rubric teachers’ capacity to teach in new ways as well as district administrators’ capacity to support these changes” (p.185). To establish a common understanding of local capacity for the purposes of this dissertation, I dissect the term and examine how the literature uses its components in context.

**Capacity.** Capacity, in its common usage, is synonymous with competence, aptitude, and ability; it is possessing the means to accomplish what we set out to do. In the education reform literature, it takes on more specificity in its meaning. In this dissertation, I use an aggregate of the common elements of capacity found in the research to craft my working definition as *the readiness of a local educational agency to engage in the successful implementation of an instructional improvement initiative*. Informing this definition, for example, is Massell (1998), who asserts that capacity in an educational policy context “refers to the wherewithal needed to translate high standards and incentives into effective instruction and strong student performance” (p. 1).

Spillane and Thompson (1997) maintain that the capacity of local education agencies (LEAs) “to support ambitious instruction consists to a large degree of LEA leaders’ ability to learn new ideas from external policy and professional sources and to help others within the district learn these ideas” (p. 187). They delineate three types of features of local capacity: human capital, which comprises the “commitment, dispositions, and knowledge of local reformers” (p.191); social capital, which “concerns the relations among individuals in a

group or organization” (p.193); and the LEA’s financial resources, especially as they pertain to staffing, time, and materials.

**Local.** Local capacity has long been treated in the literature as individual, residing within teachers (Darling-Hammond L. , 1990; Massell, 1998; McLaughlin, 1987; Sebring, Allensworth, Bryk, & Easton, 2006). However, recent educational reform research tends to define local capacity as systemic; it is through this lens that I approach it in this dissertation. Massell (1998) offers the following thoughts on defining local capacity in the introduction to her study of how eight states address capacity from a policy perspective:

One way of defining capacity is to ask what elements are needed to support effective instruction. People often think of capacity in terms of teachers’ knowledge and skills. But effective classrooms also require quality instructional materials and students motivated and ready to learn. And, classrooms exist within larger contexts – the school, the school district, and the state education system – that provide educational direction and leadership, and influence social norms as well as access to resources and knowledge (p. 1).

In this statement, Massell expands the concept of capacity to include the organizations that support teaching and learning at all levels of the system.

Spillane and Thompson (1997) created a study to identify the components of a local educational agency’s capacity to support ambitious instruction and to understand how these components interact with one another and evolve over time. To investigate these questions, they conducted a case study of nine districts that were implementing new math and science curricula. In this analysis they determined that, with the increasing complexity of practice called for in modern policy reforms, the longstanding conceptualization of local capacity needed to extend beyond the classroom to encompass the local educational agency’s capacity to foster improved teaching practice through the design and enactment of policies that support instructional reform. They found that local capacity embodies a more systematic connotation than individual competency, in that

[It] consists of human capital (knowledge, skills, and dispositions of leaders within the district), social capital (social links within and outside of the district, together

with the norms and trust to support open communication via these links), and financial resources (as allocated to staffing, time, and materials. Our conception of capacity, then, moves beyond individual skills and knowledge (Spillane & Thompson, 1997, p. 199).

The extensive and influential longitudinal research on school reform conducted in Chicago during the 1990s also exposed the need for a strong systemic infrastructure to invest in policies, professional training, and support. In writing about that research, Bryk et al (1999) noted that

To further advance student learning required improving the basic human and organizational capacities of these school communities. One key is helping local actors – principals, teachers, parents, and community leaders – to better understand their own school situations and improve their abilities to plan, budget, and evaluate. Even more fundamental is a need for significant advances in the knowledge, skills, and dispositions of local school professionals in their ability to work cooperatively toward a more coherent school practice and in their ability to effectively engage parents and the local community. (Bryk, Hess, Mirel, & Wong, 1999, p. 88)

In other reports, the Chicago researchers used a narrower frame when considering local capacity, noting that, “To build internal capacity, principals make a major commitment to individual professional development [of teachers]” (Sebring & Bryk, 2000, p. 4). Bryk et al (1999) also advocate that Chicago Public Schools, in addition to recruiting, preparing, and mentoring principals, expect those principals to, in turn, focus on hiring, training, and coaching teachers.

### **Building Local Capacity**

To date, the school improvement literature is filled with arguments for the importance of developing local capacity (Bryk, Sebring, Allensworth, Luppescu, & Easton, 2010; Elmore, 2004; Fullan, 2000; Marsh & Crocker, 1991; Massell, 1998; Spillane & Thompson, 1997; Tucker, Nembhard, & Edmondson, 2007) and with characteristics and depictions of what that capacity comprises (Bryk, Sebring, Allensworth, Luppescu, & Easton, 2010; Elmore, 2004; Marsh & Crocker, 1991; Rowan, Correnti, Miller, & Camburn, 2009).

Now that the case for developing local capacity has been made and the concept understood, the direction to head is toward identifying the specific mechanisms and strategies for building it. Around the turn of the century, a handful of studies began to address some ways in which capacity-building has been addressed at a local level (Bond, Glover, Godfrey, & Patton, 2001; Harris A. , 2002; Lambert, 2000; Massell, 1998; Newmann, King, & Youngs, 2000). While a few common themes emerged, such as the importance of administrative leadership, the field stopped short of identifying a consistent set of mechanisms or guidelines that increase the odds of successfully increasing the organizational capacity of schools and districts to engage in systemic instructional reform.

Having a conceptualization of local capacity is important, but knowing how to develop it brings us to durable instructional improvement. Spillane and Thompson (1997) draw on their case study of math and science reform in nine school districts to develop the argument that building local capacity entails the cultivation of an interdependent relationship between social and human capital, supported by financial resources. For example, the disposition of a district's leadership influences its ability to build collaborative external partnerships.

In this view, learning is the process through which human capital is developed, and learning or the development of human capital depends critically on the development and exploitation of social capital. Some threshold value of financial resources is undoubtedly necessary as well, but the value of financial resources in the capacity-building process is heavily conditioned by the human and social capital in the district (Spillane & Thompson, 1997, p. 199).

Bryk et al (1999) echoed this depiction of capacity-building, noting that a "school's capacity to pursue new standards, or other calls for reform, is grounded in the basic human, social, intellectual, and fiscal resources available in that specific school community." (Bryk, Hess, Mirel, & Wong, 1999, p. 96)

Massell (1998) studied capacity-building policies across eight states, looking both at the classroom level and at the school, district, and state level. In this study, the four common

strategies that Massell (1998) observed in each state, to varying degrees, are: building external infrastructure to provide professional development and technical assistance; setting professional development and training standards; providing curriculum materials; and organizing and allocating resources. In addition, she identified four promising approaches that states were beginning to employ, including decentralizing support systems to locate technical assistance closer to schools; facilitating the creation of professional networks of educators; providing specified guidance and professional development for state-supported curricular frameworks; and increasing investment in high-quality professional development opportunities for educators (Massell, 1998).

In this study, Massell (1998) also acknowledged potential challenges to capacity-building methods. First, state departments of education and their external partners are limited by their own capacities. Some of the local capacity-building measures, such as decentralizing technical assistance for schools, rely on extensive human capital and can be draining on an organization's resources. Second are issues with the interpretation and application of performance data. It cannot be assumed that teachers and administrators are well-equipped to make decisions leading to instructional improvement based on student data; training local educators on data-based decision making is another potential draw on state resources. Third, Massey found that the majority of capacity-building efforts were channeled to lower performing districts, leaving the large percentage of schools in the middle of the performance distribution to fend for themselves in their quest to meet state standards. Fourth is a concern over continuity, consistency, and coherence in statewide capacity-building efforts. Finally, while states are providing incentives to participate in capacity-building efforts, officials in all eight of the states in Massell's study expressed concerns that these incentives are not sufficient to motivate all schools and districts to devote their energy and resources to adopting and following new state standards (Massell, 1998).

## **School Improvement Networks**

One fruitful context in which to observe the development of system-level support for local capacity-building is within large-scale school improvement networks. In general, these initiatives aim to address the problems outlined above with their particular focus on the simultaneous reorganization of multiple roles. The intention of these school improvement networks is to improve educational practice and increase student achievement by supporting sustainable systemic changes within the outlet schools. They take on a variety of shapes, but the common essential structure encompasses a central *hub* enterprise, operated independently from the local school districts, whose spokes reach out to *outlet* schools, with which they collaborate to initiate and develop schoolwide instructional improvement programs. The hub organizations are typically external to the local schools and districts (Peurach & Glazer, 2011; Peurach, Glazer, & Lenhoff, 2014; Rowan, Correnti, Miller, & Camburn, 2009). The two most prolific types of external school improvement networks are Charter Management Organizations and Comprehensive School Reform partners.

### **Comprehensive School Reform Partners**

Among the earliest efforts to establish large scale efforts was the introduction of Comprehensive School Reform Partners. Stemming from a movement introduced in the early 1990s, in 2001 the Comprehensive School Reform (CSR) Program became a federally funded component of the revised No Child Left Behind Act. Sometimes labeled *schoolwide* or *whole school* reform, CSR coordinated private and public enterprises intended to assist public schools in putting comprehensive, research-based school reforms into practice to raise student achievement (Borman, Hewes, Overman, & Brown, 2003; Comprehensive school reform, 2004; Comprehensive school reform program, 2004). To receive CSR funding, schools were required to move away from fragmented reform efforts and create a plan for incorporating a coherent, research-based set of schoolwide improvements, encompassing all

aspects of the educational process, from benchmarks for student achievement to teacher professional development experiences to parent involvement opportunities (Comprehensive school reform, 2004; Comprehensive school reform program, 2004; Desimone L. , 2002). In 2006, this federal funding was eliminated and the CSR program ended.

During the early 2000s, there were multitudes of CSR partnerships, operating under myriad designs for schoolwide improvement, involving thousands of schools across the United States. The most widely reaching initiatives included Accelerated Schools, Success for All, and America's Choice (Borman, Hewes, Overman, & Brown, 2003; Cohen, Peurach, Glazer, Gates, & Goldin, 2013; Comprehensive school reform, 2004).

One of the requirements of the CSR Program was to outsource the school improvement process by engaging “high quality external technical support and assistance from an external partner with experience and expertise in schoolwide reform and improvement” (Comprehensive school reform program, 2004, p. 1; Murphy & Datnow, 2003). A collection of innovative comprehensive school reform models arose from this legislation, along with organizations to facilitate their implementation in schools (Borman, Hewes, Overman, & Brown, 2003). Operating outside of the schools they assisted, these organizations offered models for whole-school reform and training for educators in the implementation of these models, with a variety of specificity. While some CSR partners provided highly detailed strategies for implementation and sustainability, including instructional content and strategies, personnel configurations, and continuing professional development, others offered broader frameworks and on-demand technical assistance while leaving the finer points of on-the-ground enactment up to the schools (Borman, Hewes, Overman, & Brown, 2003; Desimone L. , 2002; Murphy & Datnow, 2003).

## **Charter Management Organizations**

Charter Management Organizations (CMOs) are nonprofit enterprises that establish and manage multiple charter – that is, publicly funded and independently operated – schools (Farrell, Nayfack, Smith, Wohlstetter, & Wong, 2009). Within that broad definition, more precise interpretations of CMOs emerge from the literature. For example, Furgeson, et al. (2012) have specified CMOs as nonprofit organizations that manage at least four charter schools, serve nonspecialized student populations, and exercise direct control over school operations (Furgeson, et al., 2012). Miron and Urschel (2010) characterize CMOs as nonprofit educational management organizations that receive “substantial financial support from private foundations for the purpose of helping bring what they believe are successful models to scale” (p.7).

A number of CMOs have been instrumental in scaling up successful practices within the charter sector movement, particularly those whose models offer greater access to generous philanthropic funding, more frequent and structured opportunities to collaborate, and stronger fortification against challenges than stand-alone charter schools have (Charter Management Organizations, 2013; Farrell, Nayfack, Smith, Wohlstetter, & Wong, 2009; Farrell, Wohlstetter, & Smith, 2012; Furgeson, et al., 2012). These organizations provide financial, physical, technological, and administrative resources to their member schools, coupled with educational supports such as teacher professional development, student assessment, and data analysis (Charter Management Organizations, 2013; Farrell, Nayfack, Smith, Wohlstetter, & Wong, 2009; Furgeson, et al., 2012).

Originating with Aspire Public Schools in 1999, over 130 CMOs currently operate about 800, or 16%, of the charter schools in the United States. Among the more prominent and influential CMOs are Knowledge is Power Program (KIPP), Uncommon Schools, and

Imagine Schools (Charter Management Organizations, 2013; Farrell, Nayfack, Smith, Wohlstetter, & Wong, 2009).

### **Organizational Learning in School Improvement Initiatives**

The objective of consciously and carefully directed organizational learning is to move an enterprise beyond the status quo. While their blueprints for practice and the mechanisms for implementing them may be thoughtfully and purposefully designed, CMOs, CSR partners, and other school improvement networks that strive to enjoy sustained success and scale-up are advised to plan for, and engage in, an organizational learning. According to Gill (2010), “An organization is learning when people are continuously creating, organizing, sorting, retrieving, interpreting and applying information...the learning is intentional; it is for the purpose of increasing organizational effectiveness” (Gill, 2010, p. 6).

Organizational learning theory broadly presents a proactive, inquiry-based approach to problem-solving. From this angle it promotes the detection and correction of errors, relies on shared understanding, embeds new knowledge and routines within the organization, helps to balance continuity and change, and nurtures renewal and transformation from within the organization while responding to externally imposed challenges (Collinson & Cook, 2006; Collinson, Cook, & Conley, 2006). While there exist numerous nuanced theories of organizational learning, Fiol and Lyles (1985) assert that “In all instances the assumption that learning will improve future performance exists” (p. 803).

On the other hand, Weick (1991) argues that “change has little to do with learning” (p. 118). He contends that changes in behavior can occur for a variety of reasons, including boredom, excitement, or overload; learning takes place when either knowledge is developed about the action-outcome relationship and the effect of the environment upon this relationship or when “groups of people give the same response to different stimuli” (Weick, 1991, p. 121). Cook and Yanow (1993) argue that “organizational learning, like individual

learning, does not necessarily imply change, particularly observable change. An organization can, for example, learn something in order *not* to change” (p. 378). Senge (2001) adds another perspective with his creative tension theory, asserting that organizational learning does not entail an attempt to change the current reality; instead, learning happens through reconciling that reality with an ideal vision, bringing them closer to each other.

Two components that could contribute to organizational learning are *learn-what* and *learn-how* (Edmonson & Moingeon, 1996; Tucker, Nembhard, & Edmondson, 2007). Learn-what comprises the learning used to identify best practices; learn-how includes the learning activities that lead to operationalizing those best practices within an organization. In their studies of health care organizations, Tucker, Nembhard, and Edmondson (2007) found a strong correlation between learn-how and implementation success. “Learn-how helps ensure that practices are modified to fit the context by providing opportunities for staff to experiment with new practices and to have a role in shaping those practices” (Tucker, Nembhard, & Edmondson, 2007, p. 903). Learn-how, thus, can be likened to building local capacity for implementation through experimentation and experience.

School improvement networks can engage in organizational learning by implementing innovations in their outlet schools and observing the success with which they are put into action, then using that feedback to inform meaningful improvements upon the initiative. Lytle (2002), a superintendent, describes the critical importance he sees in the organizational feedback loop in implementing Success For All, a major CSR initiative, in his district: “The process of reviewing student performance at eight-week intervals and reformulating instruction based on this analysis might conceivably be a more important element of the program design than the reading materials” (p. 165). Berends, et al. (2002) found that in the New American Schools model, progress monitoring, self-evaluation,

reflection, and adaptation by the hub enterprises were influential components of the long term success of external interventions.

Peurach and Glazer's (2011) empirical study of Success for All lends evidence that organizational learning and building the capacity to effectively scale up – that is, to inspire “deep, broad, and sustained change in practice” - occurs not in a linear fashion, but through a reciprocal, mutually adaptive process of exploitation and exploration (Peurach & Glazer, 2011, p. 3). Exploitation comprises “identifying new possibilities through search, experimentation, discovery, and invention;” it is research-based idea generation. Exploration “involves leveraging established, selecting from alternatives, and learning and refining through repeated use;” it is field-based trial-and-error discovery (Peurach & Glazer, 2011; Peurach, Glazer, & Lenhoff, 2014, p. 8). Otherwise put, “routines and beliefs change in response to direct organizational experience through two major mechanisms...trial-and-error experimentation [and]...organizational search” (Levitt & March, 1988, p. 321).

### **Ostensive and Performative Aspects of Organizational Routines**

One mechanism for capturing and increasing knowledge within an organization is the routine. In their literature-based theoretical piece on the role of routines in organizational learning, Feldman & Pentland (2003) describe two aspects of organizational routines: the *ostensive*, which is the schematic form of a routine and the *performative*, which is the enactment of a routine. The ostensive aspect defines what, ideally, the routine comprises; this aspect may be codified or tacit. The performative aspect is the execution of the routine by specific people in specific contexts (Feldman & Pentland, 2003).

Working together within an organizational system, the ostensive and performative aspects of routines can be conceptualized as “generative systems created through the mutually constitutive and recursive interaction between the actions people take (performative aspect of routines) and the patterns these actions create and recreate (ostensive aspects of

routines)” (Feldman & Orlikowski, 2011, p. 1245; Feldman & Pentland, 2003). Becker et al (2005) argued that ostensive and performative represent the concrete and the abstract aspects of organizational routines, respectively. Becker et al (2005) describe them in a recursive relationship, in that the ostensive guides the performative while the performative informs the ostensive.

Spillane (2005) continues and extends the analysis done by Becker et al (2005), referring to the performative aspect as *practice* and noting that “The ostensive aspect frames practice – both enabling and constraining it. Practice creates and recreates the ostensive aspect” (Spillane, 2005, p. 148). He takes on a broader concept of ostensive and performative, moving beyond routines and into other facets of an organization. “Though Feldman and Pentland (2003) confined their discussion to organizational routines, ostensive and performative distinctions can be applied to other aspects of the situation, including structures and tools” (Spillane, 2005, p. 148). In this dissertation study, I take Spillane’s direction, expanding Feldman and Pentland’s ostensive and performative dichotomy beyond routines and applying them to other aspects of organizational practice.

The observation and careful analysis of divergences between the ostensive and performative aspects of routines provide rich opportunities for organizational learning (Becker, Lazaric, Nelson, & Winter, 2005; Payne, 2008). This analysis can expose gaps in communication between the architects of the ostensive blueprint for action and its implementers, or it can identify ways in which expert enactment actually enriches that blueprint within particular contexts. It may capture mechanisms of organizational stability or drivers of change (Becker, Lazaric, Nelson, & Winter, 2005). The objective of this organizational learning process is to facilitate the identification and creation of a set of routines – both as specified and as performed – that will function effectively and in concert and that will be embraced and enacted throughout the organization.

One way in which some large-scale school improvement initiatives have supported deep change in practice has been to develop specific designs for the day-to-day practice of teachers, school-level leaders, and system-level leaders, then to support the enactment of these roles with guidance for codified, formal routines. Based on her empirical study of routines as a source of organizational change, Feldman (2000) defined these *organizational routines* as “repeated patterns of behavior that are bound by rules and customs and that do not change very much from one iteration to another” (p. 611). They are the mechanisms through which organizations operate to consistently accomplish their work.

By reviewing the research on organizational learning, Levitt and March (1988) uncovered consistent evidence to indicate that institutionalized routines can be a powerful resource for effecting sustainable organizational change, as they reside within the organization rather than within its individual members, and are therefore “capable of surviving considerable turnover in individual actors” (p. 320). This school of thought suggests that the overhaul of the regular habits of an organization fosters fundamental changes in operation, process, and outcome.

Not only does organizational learning as described above draw on the revision of routine specifications, it calls for a transformation of how personnel enact these routines in their daily practice. It is not enough to create a new blueprint for practice, an *espoused theory*, to change the way things are done; it is essential that the *theory-in-use*, that is, the practice itself and the way it is enacted by the organization’s members, change correspondingly (Argyris & Schon, 1978). Organizational learning, in this model, entails the testing and restructuring of the theory-in-use. In the case of large-scale school improvement, modifying both the espoused and enacted routines within the system can lead to lasting changes in how system-level actors involve themselves in the support of improving instructional practice.

However, as practice does not always follow principle, this approach is not as straightforward as it may appear to be. Evidence has shown that the performance of organizational routines often deviates from their specifications. This difference between what is expected and what is done can be owed to a variety of factors, ranging from a problematic lack of clarity in the guidance for practice to a promising context-based interpretation and execution of the role or activity (Berends, Bodilly, & Kirby, 2002; Blyth, 2008; Lytle, 2002; Rowan, Correnti, Miller, & Camburn, 2009).

### **Conclusion**

This dissertation is a brushstroke on the tableau of studies that have been conducted in the search for understanding the mechanisms for effective instructional improvement on a large scale. I seek the relationship between what the ostensive – in particular, the expectations put forth in a role design – and the performative – how this role design is interpreted and lived through those who carry it out. I also investigate the ways in which this relationship influences organizational learning. I draw on Spillane’s expanded conceptualization of ostensive and performative, applying these aspects to the design and enactment of practice. The study takes place within a large-scale, hub-based school improvement initiative that aims to effectively implement instructional interventions by building local capacity for reform.

This literature review has introduced the story to which I hope this study contributes. It began with the policy context, the backdrop for reform and the changing nature of educational leadership. It continued with a discussion of how human agency, or the relationship between people’s actions and organizational structures, influences the connection between ostensive and performative aspects of an organization (Feldman & Orlikowski, 2011). I continued through some theories of organizational learning, focusing on mechanisms for building local capacity and supporting leaders as they navigate the landscape

of systemic change. In the upcoming chapter, I share the specifics of the research design for this case study, along with the analytic methods I used and the limitations I encountered.

**CHAPTER III**  
**METHODOLOGY**  
**Research Questions**

In order to frame the investigation of the development of local capacity through the support of system-level actors, this study raises and examines the following questions:

Within a large-scale, network-based school improvement initiative,

1. What are the specific designs for the day-to-day practice of network-based consultants? How do the documented and voiced representations of these designs align with one another? What competencies are privileged in these representations of the designs? What guidance is provided to support the implementation of these designs and the development of these competencies?
2. How do role incumbents interpret and enact these functions, competencies, and guidance? What variation exists, if any, between the role incumbents' interpretations and enactments and the design for practice?

In the interest of discovering the process for organizational learning employed by a large-scale school improvement initiative, based on feedback loops regarding the role of the network-based consultants, this study poses and addresses the following question:

3. How does the organization collect, process, and apply feedback for the continuous improvement and refinement of the role expectations and support of the network-based coordinators?

**Research Design**

I have addressed the above research questions through a single-site, embedded case study of one initiative's effort to develop leadership capabilities at higher levels of the system, in support of local instructional improvement. Qualitative researchers endeavor to make sense of experiences through the lenses of those who live them. By selecting a case

study design, in particular, I positioned myself to study these experiences deeply and intensely within a bounded context (Merriam, 2002).

Using this case study design gave me the means to address *how* and *why* research questions in the contemporary context of a pre-existing initiative over which I have had no control as a researcher (Yin, 2009). This methodology has allowed me to observe closely a small number of system-level actors and to gain a rich and detailed understanding of how they prepare for, interpret, and enact their roles. The findings from this study will contribute to the greater body of school improvement implementation literature by providing, as Walton (1992) describes it, “at least one anchor [among many] that steadies the ship of generalization” (p.122). Specific to this investigation, this case study design is useful and appropriate for three strategic reasons:

1. A case study provides the opportunity to construct context-dependent knowledge similar to that which is gained through experience, and upon which expertise is built.
2. It has enabled me to connect context-independent, theoretical knowledge with its real-world application.
3. This design is conducive to providing concrete, useful knowledge, generated by the observation and analysis of actual role performance. (Flyvbjerg, 2006; Yin, 2009).

This case study involves two nested units of analysis. Within the context of large-scale school improvement, the case in this study is a state-level school improvement initiative. Inside that initiative, I have closely observed how leadership development plays out among a subset of embedded cases, those being the network-based consultants (See Figure 3.1: Embedded Case Study Design). Specifically, I observed and analyzed the specified design for system-level leadership as defined by the school improvement initiative, the performed practice of the system-level consultants enacting this design, and the initiative’s analysis and use of any discrepancies between the design and the enactment to improve the ways in which it develops the capacities of these system-level leaders.

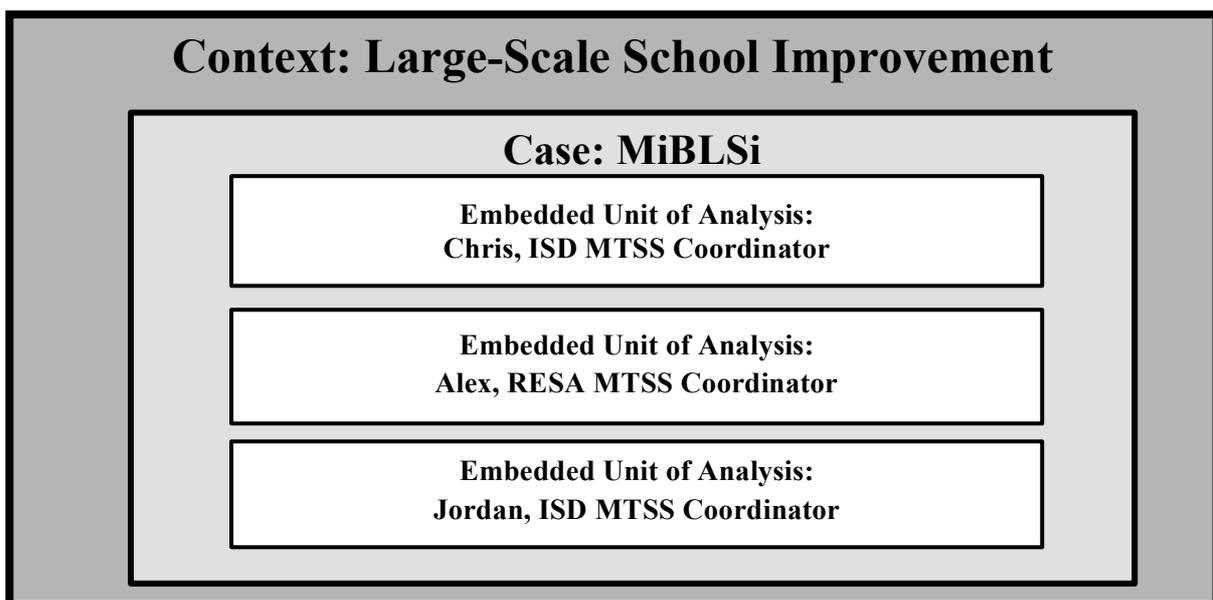
## Case

I have situated this study of system-level leadership development in the context of Michigan's Integrated Behavior and Learning Support Initiative (MiBLSi), a large-scale, network-based school improvement initiative that helps local districts to establish and sustain the Multi-Tier System of Support (MTSS) model in schools.

### Multi-Tier System of Support

With the intent of enabling educational equity for all students, MTSS is a framework in which differentially intensive interventions are introduced to students based on their needs. Tier 1 interventions are high quality, research-based strategies that apply to the general population of students. Those students who are identified by their teachers as non-responsive to Tier 1 interventions and/or are identified by a universal screening assessment as falling below a predetermined standard receive additional, more focused interventions within the classroom (Tier 2). Only those students who continue to struggle with the Tier 2 interventions are offered the most intensive services, often outside of the regular classroom setting (Tier 3) (An abstract regarding MTSS and MiBLSi, 2014; Greenwood, et al., 2011).

**Figure 3.1: Embedded Case Study Design<sup>3</sup>**



<sup>3</sup> Adapted from Yin, 2009 & 2011

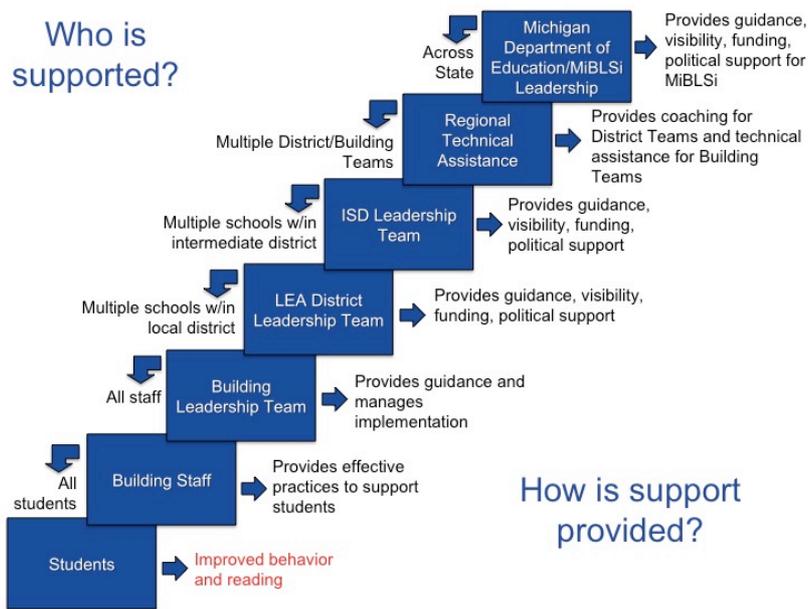
## **Michigan’s Integrated Behavior and Learning Support Initiative**

Michigan’s Integrated Behavior and Learning Support Initiative (MiBLSi) is specifically designed to help schools and districts in Michigan reengineer schoolwide support systems in reading and behavior management using MTSS. Sponsored by the Michigan Department of Education Bureau of Special Education, the stated purpose of MiBLSi is to “support the alignment, capacity development, sustainability, and durability of MTSS” (An abstract regarding MTSS and MiBLSi, 2014, p. 6). In effect, MiBLSi assists districts and schools in reorganizing around MTSS, with the intent to improve learning and behavior among all students and to concentrate special education resources on those students who are most in need of services.

**Statewide Cascading Structure of Support.** Through MiBLSi, leaders at the state, Intermediate School District (ISD), local district, and school levels work in concert to recraft the organizational structure, as well as teachers’ practices, for managing students’ academic and non-academic challenges. In the MiBLSi professional learning model, actors within the system pass their own learning to others in a structured, trickle-down design, to build capacity and deepen knowledge at all levels of the system (Hannaway & Stanislawski, 2005). MiBLSi calls this model the Statewide Cascading Structure of Support (See Figure 3.2: MiBLSi Statewide Cascading Structure of Support). It is designed so that actors at each level of the system, from the Michigan Department of Education down to the students, support those at each of the levels below them. (District support model report, 2013).

At the top of the structure sit a pair of decision-making groups: the Michigan Department of Education, which provides funding and political support for the project at the state level, and the MiBLSi Core Team, which defines the project’s vision, promotes the model both within and beyond Michigan, and offers training and guidance to regional personnel.

**Figure 3.2: MiBLSi Statewide Cascading Structure of Support<sup>4</sup>**



Just below the leadership tier are the regional Technical Assistance Partners (TAPs). These expert consultants each work with multiple ISD and local implementation teams, providing coaching and technical assistance with the MTSS implementation process. TAPs are directly responsible for supporting the work of the MTSS coordinators, who are at the center of this study.

On the next level down the cascading model are the ISD Executive Leadership and Implementation Teams. This group, which typically includes ISD administrators and other stakeholders, provides similar supports at the county level as the Core Team offers at the state level: financial and political backing, visibility, and guidance through the implementation process. Operating at this level, MTSS coordinators are responsible for guiding the district and building leaders with whom they interact to conduct the work of reconstructing learning environments within the context of existing organizational frameworks and in the midst of the educational process, to the end of implementing successful and sustainable MTSS models in their schools and districts.

<sup>4</sup> Retrieved from <http://miblsi.cenmi.org/MiBLSiModel/Support.aspx>

Beneath the ISD teams in this organizational structure are the Local Education Agency (LEA) Executive Leadership and Implementation Teams. Usually comprised of a combination of school and district administrators, teacher-leaders, and other invested staff, the LEA teams provide financial, coaching, and training support to Building Leadership Teams within their local districts. These Building Leadership Teams, generally made up of school principals and teacher-leaders, manage the MTSS implementation process at the school level by training and coaching teachers and other school-level staff in MTSS practices. Continuing down the support structure, these school-level personnel incorporate MTSS strategies in their daily interactions with children, bringing the model to its end goal of positively impacting student outcomes in behavior and reading.

Within this extensive, trickle-down support system, MTSS coordinators hold a linchpin role. They represent the first point of contact between the MiBLSi project and the districts who are implementing MTSS. The MTSS coordinators are responsible for guiding local implementers in translating the MiBLSi model of MTSS implementation into on-the-ground practice in schools.

**Embedded units of analysis.** In this study, I have investigated the particular experiences of second-year MTSS coordinators. This cohort of coordinators spent their first year of involvement with MiBLSi preparing for their training role and designing support systems for the districts with which they are working. In their second year – the year under study here - they engaged fully in training and supporting local district leaders as they introduced and implemented MTSS at the school level. During the study year, the MTSS coordinators participated in regular professional development and side-by-side training with MiBLSi personnel; in future years, the level of hands-on support will gradually subside.

## **Sample Selection Process**

In the interest of selecting participants whose experiences would be highly informative to the study, I recruited the assistance of MiBLSi program administrators to purposively select a trio of MTSS coordinators whose contexts are geographically and demographically similar but whose professional backgrounds and time allocated to this work are varied. This type of targeted sampling “focuses on selecting information-rich cases whose study will illuminate the questions under study” (Patton, 2002, p. 273). The selection of these particular participants has offered me the opportunity to observe how MTSS coordinators utilize MiBLSi’s support and how they interpret and enact their role across differing backgrounds and availability for the work. This learning will inform the program’s support of the MTSS coordinators by allowing for the identification of their common needs; it may also highlight where differentiation of support would be worthwhile.

In an initial conference with MiBLSi’s Evaluation and Research Coordinator, we identified several primary criteria to use in selecting cases: the ISD’s configuration of the MTSS coordinator role, the initial capabilities of both the MTSS coordinator and the ISD implementation team, and the nature of the LEAs with whom the MTSS coordinators interact. We used these criteria to identify a sample pool, from which we selected three ISDs for my study. After also taking into account some logistical considerations, including geographical location of the ISDs relative to each other and to my home base, ISD approval of the MTSS coordinator’s participation in the study, and the willingness and enthusiasm of the individual coordinators to contribute to the study, the final sample was identified.

The objective in selecting this sample of critical cases was to create an assemblage of participants that would represent a range of professional experiences with MTSS coordination. As one of the objectives of the study is to help MiBLSi design supports for incoming MTSS coordinators, we have selected a sample that has allowed me to identify and

analyze the elements of their practice that facilitate their work, as well as those that bring about challenges. The assumption can be made that these three MTSS coordinators, as an ensemble, engage in an aggregate experience that is representative of the general experience of actors in this role with MiBLSi (Platt, 1992).

Although I found a trio of coordinators who met the criteria for the study and who enthusiastically offered rich and interesting data for my analysis, the sample selection process was more problematic and time-consuming than I had anticipated. The MTSS coordinators who we initially approached for participation did not all join the study. Specifically, one potential participant stated that after some reflection, she realized she did not have the time and attention to devote to participation. Another MTSS coordinator expressed personal interest in the study, but after about a month of communication was unable to secure appropriate authorization from her partnering district. As their professional contexts are different from those in the final sample, including these two MTSS coordinators may or may not have impacted the outcomes of this analysis.

## **Participants**

### **MTSS Coordinators**

**Chris.** Chris<sup>5</sup> is a full-time educational consultant whose primary function is MTSS coordination throughout the ISD. This ISD is located in a predominately rural county. It offers support services and resources to nine local school districts and one community college. Among the programs provided to the districts in this ISD are career preparation, technical education, Great Start, and talent development. This ISD also provides services such as assistive technology, home schooling support, truancy assistance, and Special Olympics coaching to families in the area<sup>6</sup>.

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<sup>5</sup> To protect the identities of the MTSS coordinators and Technical Assistance Partners in the study, I have assigned each of them a common, gender-neutral first name.

<sup>6</sup> General information about the ISDs and RESAs was gathered from their respective websites. However, those websites are not included as citations, in order to maintain confidentiality of the study participants.

Chris entered into the role of ISD MTSS coordinator in September 2012. Originally, this position was to be shared with another individual. However, when that co-coordinator resigned, Chris took on the full role of MTSS coordinator, incorporating it into the educational consultant position. Chris is now responsible for facilitating MTSS implementation across the ISD, including districts that are enacting MTSS both with and without MiBLSi's support.

Chris has an academic and professional background in elementary education and literacy. Upon completing a bachelor's degree in elementary education and early childhood, Chris began a career in day care, followed by a stint as a Michigan School Readiness teacher. After that experience teaching Young 5s and Kindergarten, Chris moved to the 1<sup>st</sup> grade classroom.

Chris' tenure as a teacher included experience in implementing Response to Intervention (RtI), the precursor to MTSS. Chris served as an assessor and a trainer for the Dynamic Indicators of Basic Early Literacy Skills (DIBELS) universal screener, which is endorsed by MiBLSi. At the current ISD, this expertise has allowed Chris to serve as a DIBELS mentor for districts, building the capacity in district-level and school-level assessors to become DIBELS trainers. Chris is also the School Wide Information System (SWIS) facilitator and the Positive Behavior Intervention System (PBIS) assessment coordinator for the ISD.

Additionally, Chris meets regularly with the County Leadership Council, comprised of leaders from each district, to keep them abreast of MTSS implementation and to help keep local initiatives aligned with MTSS. Chris also coordinates literacy and behavior supports across the ISD and spends time in schools, supporting teachers in differentiated reading instruction.

**Alex.** Alex is the MTSS coordinator for a Regional Educational Services Agency (RESA) that supports seven local school districts, as well as a county-wide technical education center. This RESA's domain encompasses both rural and suburban districts, as well as one small city. The RESA offers a multitude of programs to districts, including technology support, legal services, and school nurse staffing. It also offers services to families, such as homeless student assistance, bilingual resources, and a college access network. Additionally, it is the authorizing agency for a number of public school academies and charter schools. This RESA supports districts that are implementing MTSS independently, along with one that is partnering with MiBLSi.

Alex is expected to execute MTSS coordinator responsibilities in addition to a role as the RESA behavior specialist, which Alex has held since 2008. Alex's professional time is split evenly between responsibilities as a MTSS coordinator and those as a behavior specialist. The behavior specialist function centers on providing individual supports to students and classroom supports to teachers, along with assisting in the development of building and district wide behavioral support systems such as Positive Behavioral Intervention and Supports (PBIS).

Alex has been the MTSS coordinator at this RESA since fall 2012. Prior to this position, Alex served as a MiBLSi-certified trainer, delivering supports at the building level for about five years. As MiBLSi shifted its focus to district level supports, Alex moved into the MTSS coordinator role at the RESA level. According to Alex, once the original, three-year partnered implementation process concluded, buildings were not sustaining MTSS with fidelity. As this was happening, Alex noticed that

Most districts weren't very aware of what the buildings were doing, what the critical components were, what needed to be sustained, what needed to be included...so I became very interested in how to support the district in moving up a level to district-wide supports in order to support the building level.

Coming from a field-based behavioral background, Alex was attracted to school improvement work, and to MTSS in particular, by a desire to help all students to feel a sense of belonging in their schools and, through this connectedness, to achieve academic success.

Unlike Chris, Alex had no experience with MTSS or tiered support before joining MiBLSi. Alex earned a bachelor's degree in criminal justice and psychology and a master's degree in social work and is a certified juvenile sex offender therapist. This education informed Alex's prior work as a juvenile probation officer, a foster care case manager, and a child and family therapist. Much of Alex's time as a therapist was spent in residential facilities – one for children with emotional impairments and another for those with developmental disabilities.

As a MTSS coordinator, Alex describes the primary responsibility as coordinating several groups at the same time, especially the RESA and District Implementation Teams. In this capacity, Alex prepares the information, training, and supports from MiBLSi to be shared with these teams. Beyond the responsibility of organizing the training and work of these teams, Alex is charged with establishing a RESA system for further exploration of MTSS strategies.

**Jordan.** The third MTSS coordinator this study, Jordan, works for an ISD located in a remote, rural area. Its county encompasses eight local school districts. Like Chris' ISD and Alex's RESA, this ISD provides a variety of programs and services to its districts, schools, and students. For example, the ISD offers administrative services such as payroll and student record-keeping to districts, as well as professional development opportunities for educators and curricular support for schools. Families can take advantage of services such as math and science enrichment activities, a foster grandparent program, and continuing education classes. The ISD also operates a regional technical center.

About half of Jordan's professional time is spent specifically in the MTSS coordinator role; the other half is devoted to duties as a School Psychologist. Despite spending an average of three days per week engaged in MTSS work, Jordan officially has two days per week allocated to this role. Initially, Jordan was assigned only to districts that had been through MiBLSi implementation at the building level, but is now responsible for supporting MTSS Implementation both in local schools that are partnered with MiBLSi and in those that are not. Whereas Chris and Alex only work with one MiBLSi-partnered district each, Jordan works with two.

Like Chris and Alex, Jordan took on the MTSS coordinator role in the fall of 2012. However, Jordan is, by training, a school psychologist with both undergraduate and specialist degrees in the field; Jordan's graduate thesis was in the realm of early literacy. As a school psychologist, it is Jordan's job to consult with teachers, parents, and school staff about academic and behavioral challenges, to administer student assessments and special education evaluations, and to counsel individual students. Jordan also supports districts in data analysis, problem-solving, and the school improvement process. In addition to these responsibilities, Jordan facilitates the Positive Behavioral Intervention and Supports (PBIS) team meetings and has served on the curriculum review committee.

When Jordan took on MTSS coordination, some districts within the ISD had background knowledge of MTSS, and some were implementing without partnering with MiBLSi. Before becoming the MTSS coordinator, Jordan had already been coaching MTSS implementation in buildings that had been through the MiBLSi model and was working with a team to research best practice and curriculum instruction toward developing and administering guidance for teachers about writing. That team has since broadened its focus to encompass adolescent literacy across content areas.

## **Technical Assistance Partners**

While Technical Assistance Partners (TAPs) are not the primary focus of this research, their work is closely tied, and in many instances intertwined, with the MTSS coordinators' practice. They train and coach the MTSS coordinators, often co-planning and co-leading district trainings, in the service of scaffolding the coordinators' progress toward guiding the district implementation process independently. Given their important presence in the work of the MTSS coordinators and in this study, it is relevant to share some details about this group.

Of the ten TAPs on MiBLSi's team, I interacted most closely with three – those who were assigned to support the MTSS coordinators participating in the study. These interactions included observations of direct support of MTSS coordinators and ISD and District Implementation Teams, informal conversations, and one in-depth interview each.

Like MTSS coordinators, TAPs come into this support role through a variety of professional paths. Their ranks include former school psychologists, social workers, classroom teachers, special educators, and administrators. Some are in their first MiBLSi role; others have worked their way through the organizational ranks to this position.

**Sam.** Sam has been a MiBLSi TAP for the past three years and actively works with MTSS coordinators in two ISDs. Prior to joining MiBLSi, Sam was a school psychologist for ten years in one of the ISDs with which they are currently partnered. Because this ISD has “always been really involved in MiBLSi,” Sam has had the opportunity to be a MiBLSi coach in three different districts, as well as a state trainer.

**Jamie.** Jamie is a first-year TAP who supports two MTSS coordinators, one in an ISD and one in a standalone district. Jamie is a former structural engineer who made a mid-career transition into school psychology and intervention. Jamie served as an early building-

level trainer for MiBLSi for several years before becoming a middle school principal. After three years in administration, Jamie was recruited back to MiBLSi for this role.

**Corey.** Corey is also a new TAP, having begun in August 2013. Like Jamie, Corey supports MTSS coordinators in two contexts: one ISD and one unaffiliated district. A long-time social worker and behavioral consultant, Corey became involved in MiBLSi in 2004 as an external coach for building level implementation. Corey's interest in broadening the scope of influence to the system level served as inspiration to move into the TAP role when the opportunity arose.

### **Core Team Members**

A final group that contributed to the findings of this study is the MiBLSi Core Team. The Core Team is the executive leadership group of this organization. They set the overarching vision for the project and create the blueprints for enacting it across the organizational levels. They secure the grant funding that keeps MiBLSi afloat and they keep the work visible and relevant throughout and beyond the state.

Beside their participation in general program leadership, four of the Core Team members are leaders of the organizational units within the project. Each of these units is tasked with developing and maintaining a different aspect of the MiBLSi project: Fiscal, Technical Assistance, Professional Learning, and Evaluation and Research. Two of these unit coordinators, plus MiBLSi's Director and Assistant Director, participated in interviews to inform this study. As with the TAPs, while they are not the subjects of the research, it is helpful to know a bit about who they are and what roles they play in MiBLSi.

**Director.** Dr. Steve Goodman<sup>7</sup> has been with MiBLSi since its inception, first as co-director and, since 2010, as Director. A former Special Education teacher and teacher

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<sup>7</sup> With permission of the participants, I have kept the real names of the Core Team members in these introductions, since they would be easily identifiable outside of the project based on their titles and other descriptive information.

consultant, he and a university colleague planted the seeds for MiBLSi in 2000. Steve's current functions as Director are primarily to oversee the fulfillment of the grant requirements, to ensure that the proposed activities are accomplished, and to communicate regularly with MiBLSi's funders. Internally, he speaks regularly with the Core Team members to assess the project's status and to address any problems or barriers that arise.

**Assistant Director.** Dr. Kim St. Martin has been involved with MiBLSi since 2003, beginning as a school principal in the building cohort model. In 2007, she was hired by MiBLSi as a TAP; two years later she became the Technical Assistance Coordinator, and then moved into her current Assistant Director position. As Assistant Director, Kim has a hand in the leadership of many aspects of the project, but she describes her role as primarily to translate the master plan for the project into actionable practices. She has also been working with the unit coordinators to focus their efforts on scaling up the model.

**Technical Assistance Coordinator.** Dr. Christine Russell has been the Technical Assistance Coordinator for MiBLSi for three years, a role she took on after two years as a TAP. As Technical Assistance Coordinator for MiBLSi, Christine has a closer hand in MTSS Coordination than the directors do. In her role, she supervises the regional Technical Assistance Partners (TAPs), who in turn support the MTSS coordinators. She sees herself as a liaison between the Core Team and the TAPs. She also works closely with the other unit coordinators to ensure the integration of the different aspects of the project.

**Professional Learning Unit Coordinator.** Dr. Melissa Nantais, MiBLSi's Professional Learning Coordinator, came to the project four years ago, after having been a school psychologist and, briefly, a MiBLSi internal coach. As she describes it, her role is to coordinate and partake in the Professional Learning Unit's endeavor to design content and experiences that support the development of training and coaching capacity across the state.

## Data Collection Methods

In this study, I collected data through semi-structured interviews, field observations, and documents. This ensemble of data sources allowed me to paint a robust picture of the design and enactment of the MTSS coordinator role. It also enabled me to experience MiBLSi's organizational learning process surrounding the support of MTSS coordinators (See Table 3.1: Sources of Evidence by Research Question).

### Interviews

My primary source of data for this study was the semi-structured interview. Interviewing gives the researcher a lens into the participants' lived experiences and their perceptions and interpretations thereof. In particular, a semi-structured interview, while requiring some specificity, relies more heavily on open-ended lines of questioning and engages the participant in determining the trajectory of the conversation; it has the potential to provide rich and full testimony from primary sources. What this methodology may forfeit in precision, it compensates with depth of information (Merriam, 2002; Patton, 1987; Weiss, 1994).

**MTSS Coordinators.** I completed a series of three face-to-face interviews of each of the MTSS coordinators (fall, winter, and spring). The intent of the initial interview was twofold: to establish a congenial researcher-participant rapport with the participants and to learn about their preparation for and preconceptions regarding their professional role as MTSS coordinators. After asking participants to describe their past and current professional roles and their preparation for those roles, I encouraged them to share their perceptions of MTSS and MiBLSi and to describe how they enact their MTSS coordinator function. They discussed their feelings of preparedness for the various types of interactions they have as MTSS coordinators. In addition, I asked them to talk about what they anticipated as

challenges in their upcoming work, and what support might help them to feel better prepared to face them (See Appendix A: Interview Protocols: MTSS Coordinators).

In the second interview, I began by framing the conversation around the Critical Components of the MTSS coordinator role, as outlined in MiBLSi's Practice Profile. The participants each completed a brief survey, intended both to remind them of the Critical Components and to invite them to rank the importance of the Critical Components to their work and their feelings of preparedness for enacting them. The survey responses formed the framework for discussions around the MTSS coordinators' global responsibilities and daily tasks. (See Appendix A: Interview Protocols: MTSS Coordinator).

The third and final interview was structured around assertions that I made based on my observations of MiBLSi and the work of the MTSS coordinators. In these interactions, I encouraged the participants to respond to my statements by reflecting upon their enactment of this role, thereby making meaning of their experiences within it (Seidman, 1991). (See Appendix A: Interview Protocols: MTSS Coordinators)

**Technical Assistance Partners.** The MTSS coordinators are heavily supported by regional Technical Assistance Partners (TAPs). The TAPs work closely with the MiBLSi staff and are charged with ensuring that MTSS coordinators work effectively with the ISD and district teams to move toward successful MTSS implementation. Since they serve as intermediaries between the program design team and the MTSS coordinators, I conducted one interview with each of the three TAPs who are working with the MTSS coordinators participating in the study. In these interviews, I inquired about the nature and frequency of support they offer to the MTSS coordinators, along with the professional development they receive from MiBLSi, and their own backgrounds and qualifications for doing this work. (See Appendix B: Interview Protocol: TAP)

**MiBLSi Core Team.** To further clarify my understanding of the MTSS coordinator role, I included two interviews with each of three members of the MiBLSi core leadership team: the Assistant Director, the Technical Assistance Coordinator, and the Professional Learning Coordinator. In the initial interviews with these leaders, I sought their perspectives on the design of the MTSS coordinator role and the role that they envision the MTSS coordinators playing in MiBLSi's implementation and scale-up strategies. I also asked about the skills and knowledge that they deem most important for successfully fulfilling those roles, and how MiBLSi has designed training and support for the MTSS coordinators in those areas (See Appendix C: Interview Protocols: MiBLSi Core Team).

The second interviews with these MiBLSi leaders was similar to the final interviews with the MTSS coordinators, in that I presented them with assertions based on my observations, and asked them to respond, extending and illuminating my learning about the role of the MTSS coordinator within MiBLSi and about the continuous improvement process within the project. (See Appendix C: Interview Protocols: MiBLSi Core Team).

To round out the interview segment of my data collection, I also engaged in one telephone dialogue with MiBLSi's Director. As one of the initial designers of the initiative, I asked him to share with me the original vision he had when conceiving the project, how this vision has changed over time, and what factors have contributed to this development. Through this conversation, I learned how MiBLSi has been designed to grow as an organization and how implementation has influenced this growth, as well as what directions he expects the organization to take as the scale-up process continues.

**Interview Mechanics.** All of the semi-structured, qualitative interviews for this study lasted between 45 and 75 minutes. Before each interview, participants were reminded of the intents of the study and their rights as participants. All interviews were audio recorded with the express written permission of each participant. Audio recording enabled me to focus on

the conversations rather than on note-taking, allowing for a more natural flow to the interaction. It also ensured that the information shared in the interview would be accurately represented for later analysis and interpretation. All interview recordings were transcribed either by me or by a transcription service then verified and corrected by me. The settings of the interviews varied at the convenience of the participants; the locations included participants' offices, a hotel lobby, coffee shops, and participants' homes. In one instance, the interview was conducted and recorded over the telephone.

### **Observations**

In qualitative research, observations complement interviews by permitting first-hand encounters with the situations that the participants have described (Merriam, 2002). In this study, I supplemented the principal data that I gathered through interviews by observing MTSS coordination and its surrounding processes in action. I used this observational data to illustrate, confront, and/or enhance the assertions that I drew from the interviews.

Throughout the data collection period, I took on a participant-observer stance while the MTSS coordinators prepared for and carried out their work with local district personnel and while they participated in MiBLSi-led professional development opportunities. I also spent time with MiBLSi staff members as they planned for supporting and guiding MTSS coordinators and as they processed feedback vis-à-vis MTSS coordination. A participant-observer is overtly present in the setting being observed (Esterberg, 2002). In this role, I became frequently and actively engaged in conversation with those whom I was observing. Even when I was simply listening, watching, and taking notes, my perspective was never passive. By taking part in their experiences in real time, I was able to witness and interpret participants' authentic interactions surrounding MTSS coordination in context.

**MTSS Coordinator Network meetings.** The MiBLSi Technical Assistance Coordinator led a 2-hour online meeting via Adobe Connect each month (eight sessions:

September, October, December, January, February, March, April, May), to provide training and support for MTSS coordinators across the state. Additionally, three in-person, all-day MTSS Coordinator State Meetings (November, March, June) provided in-depth support to MTSS coordinators, along with focused and extended time to work with their Technical Assistance Partners. I observed all of these meetings and logged detailed field notes for each one. These data add to my understanding of how the MTSS coordinator role is envisioned and supported by MiBLSi's Core Team and how the MTSS coordinators interact with one another and with their TAPs.

**District Implementation Team meetings.** I attended three District Implementation Team (DIT) sessions (fall, winter, and spring) conducted by two of the MTSS coordinators in my sample, and two DIT meetings (fall and winter) led by the third participant<sup>8</sup>. In these day-long meetings, the MTSS coordinators and their TAPs co-facilitate the work of local district-level personnel who are planning and leading the implementation process for MTSS within their own districts. While these monthly sessions were pre-planned and largely scripted, they also provided the opportunity to observe the MTSS coordinators as they engaged in impromptu support of the district-level personnel's work and learning. Additionally, they showed the ways in which MTSS coordinators were adapting the MiBLSi model to fit the context of the local districts. Again, thorough and detailed field notes serve as a record and basis for analysis of these meetings.

**Regional Focus Planning Sessions.** I observed two Regional Focus Planning Sessions, at which MiBLSi staff conducted training for MTSS coordinators and their Implementation Teams (October and February). These experiences, which I chronicled through detailed field notes, allowed me to identify and analyze the mechanisms through which MiBLSi communicates its role and performance expectations to the MTSS

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<sup>8</sup> A scheduling conflict between participants' DIT meetings precluded my observation of the final DIT meeting with one participant MTSS coordinator.

coordinators. During these meetings, I observed how the MTSS coordinator led his or her ISD team in completing assigned implementation tasks.

**Transformation Zone meetings.** I went beyond the participant-observer stance to a consultancy role at the MiBLSi Transformation Zone meetings (November, January, February, March, May), in which MiBLSi Core Team members and TAPs reflected upon their observations of, and interactions with, MTSS coordinators and the District Implementation Teams, in the interest of improving support for the local implementation process. In this forum, I not only collected detailed field notes, I also contributed to the meetings with feedback based on data gathered for this dissertation study and my first-hand observations of MTSS coordinators' work in action.

## **Documents**

Documents provide a third leg to the qualitative data stool, complementing and supporting the interview and observational data. Documents are beneficial to a qualitative study because they are typically pre-existing and unchanging, and examining them is unobtrusive to participants (Merriam, 2002). In this study, they were particularly helpful in identifying the intended design of MTSS Coordination and its role in the project.

For this study, I have gathered and analyzed printed and online documents pertaining to the role definition of the MTSS coordinator, most notably the MTSS coordinator Practice Profile. In addition, I have collected and examined a multitude of printed and online materials offered by MiBLSi to support the professional development and/or performance of the MTSS coordinators. These documents have given me a fundamental understanding of MiBLSi's vision and priorities for the knowledge and skills required of MTSS coordinators. They have served as a basis for observing the level of fidelity with which the MTSS coordinators are enacting their role.

**Table 3.1: Sources of Evidence by Research Question**

	RQ1: What are the specific designs for the day-to-day practice of network-based consultants? How do the documented and voiced representations of these designs align with one another? What competencies are privileged in these representations of the designs? What guidance is provided to support the implementation of these designs and the development of these competencies?	RQ2: How do role incumbents interpret and enact these functions, competencies, and guidance? What variation exists, if any, between the role incumbents' interpretations and the design for practice?	RQ3: How does the organization collect, process, and apply feedback for the continuous improvement and refinement of the role expectations and support of the network-based coordinators?
Interviews: MTSS Coordinators		X	
Interviews: MiBLSi Staff	X	X	X
Observations: Regional Focus Planning Meetings		X	
Observations: DIT Meetings		X	
Observations: MTSS Coordinator Network Meetings		X	X
Observations: Statewide Coaching & Implementers' Conferences		X	X
Observations: Transformation Zone Meetings			X
Document Analysis	X	X	X

### Data Analysis

I drew from the guidance of multiple methodological sources to develop the foundation for finding the story in my data. I turned to Miles and Huberman (1994), Patton (2002), Maxwell (2005), Yin (2009), and Meloy (2012) for advice and ideas for structuring analysis. Grounded in the approaches suggested in these works, and after many starts, stops, and revisions, I devised an analytic process that was methodical, that fit my data, and that made sense to me. Through this system, guided by my research questions and the

comparisons they warranted, I was able to bring forth a narrative from the daunting mountain of raw data I had gathered.

Just as each study demands a unique analytic process, I found that in this study, each set of research questions and each data source begged its own version of the methodology. Given that, I will share here the basic structure on which I based the analyses; I will elaborate on the unique features of each chapter’s analysis in the presentation of the findings.

For all research questions, I started the analytic process by preparing the data. This involved transcribing interviews (or having them transcribed), formatting field notes, organizing files by type and by source, and uploading them into a notebook in Saturate, a qualitative analysis computer application. The process that followed was similar for Research Question 1 (Design for Practice) and Research Question 2 (Interpretation and Enactment of Practice); the analysis for Research Question 3 (Continuous Improvement) differed somewhat due to the nature of the inquiry and the data.

**Analysis: Research Questions 1 and 2**

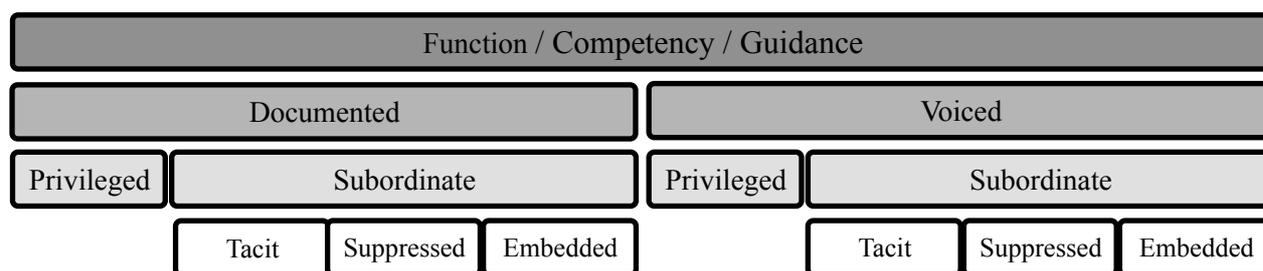
For each of these two research questions and the associated dimensions of practice (function, competency, or guidance), I developed and applied a set of codes to the data. I used in vivo codes from MiBLSi’s documented representations of the design for practice to code the functions and guidance dimensions of practice; I applied open coding to competencies.

**Figure 3.3: Sample Data Matrix**

Function Code	Documented Representation	Voiced Representation
Organize, coordinate, & co-facilitate...		
Develop & support local training capacity		
Develop & support local coaching capacity		
Guide problem-solving w/data		
Deepen personal knowledge...		
Develop a plan for continuous learning...		
Effective communication		
Relationship building		
Other		

Once the data were sorted into codes and categories, I transferred them into matrices. I created one matrix for each dimension of practice for each research question (see Figure 3.3: Sample Data Matrix). For these first two sets of research questions, looking across cells, I coded each matrix for privileging and subordination of the components of the dimension of practice by the various sources, based on the analytic framework that I developed and revised for each of these sets of findings (See Figure 3.4: Sample Analytic Framework). I synthesized the information presented in the coded matrices into cross-source tables, which I used to identify patterns across the bigger picture of the study. From these tables, I pieced together the story of these findings, diving back into the coded matrices to find rich supporting details.

**Figure 3.4: Sample Analytic Framework**



**Analysis: Research Question 3**

The analysis for Research Question 3 differed most notably from that in the first two research questions in that I did not classify the privileging and subordination of dimensions within the data. For this question, like the others, I began with coding and sorting the multitude of data. I began with a priori categories that originated in the question itself: Collect Feedback, Process Feedback and Apply Feedback. Within each of these categories, I identified and applied codes to identify the ways in which the category was addressed in each piece of data (e.g. Category: “Apply Feedback.” Code: “External Partners: MiBLSi’s Strengths”). I brought the coded data together in matrices, which I used to construct the

report of my findings. I also used the matrixed data to inform graphic representations of the pathways that feedback takes within MiBLSi.

### **Validity Concerns**

As in any study, I anticipated some biases to color this investigation. These influences include sampling bias and participant reactivity, as well as researcher bias. Since the objective of this study is to provide credible and useful observations, analyses, and feedback, rather than to uncover an objective truth, its validity lies in the accuracy of my accounts and the acknowledgement of these biases and how they shape the results. I have proactively identified and addressed each of these validity threats through the methods described below. (Maxwell, 2005).

#### **Descriptive Validity**

All validity within a study stems from the accurate and thorough recording and reporting of collected data. To maximize the descriptive validity of my study, I have taken great care to chronicle the participants' words and actions as completely and objectively as possible before applying any interpretation, engaging the support of audio recording whenever feasible and appropriate. I have incorporated both general and particular descriptions in my narrative. My account of the findings contains specific, verbatim passages from interviews, documents, and activities to support my empirical claims (Maxwell, 1992). Additionally, to maximize accuracy in my analysis and reporting, I used the final interviews to vet my initial findings with the participants and invite their reactions to and elaborations on my nascent assertions.

#### **Selection Bias**

Purposive sampling has the potential to bring about bias in the selection of participants. The participation of MiBLSi program administrators in the sample selection process was necessary for this study, as they have experiential knowledge of the population

of MTSS coordinators. As the sampling criteria included both substantive and logistical conditions, it is possible that pragmatic concerns, such as geographic proximity, limited the range of available participants and challenged the representativeness of the sample.

To address this threat, I have offered a detailed portrayal of each of the MTSS coordinators selected for the study and have provided a description of the ISD where each of them works. I have taken the characteristics of the ISDs and the MTSS coordinators into account when analyzing and reporting my findings and their generalizability (Weiss, 1994).

### **Self-reporting bias**

As the findings from this dissertation rely greatly on interview data, this study is also subject to self-reporting bias. MTSS coordinators may, whether intentionally or not, misrepresent the scope and quality of the work they are doing, the training they have received, or the resources available to them. I addressed this bias in large part through the interview process. An important function of the initial interviews was to ensure that participants understood the parameters and purposes of the interview process and content. I have made every effort to ensure that the interview protocols were free of leading questions or value judgments (Weiss, 1994).

Furthermore, for the purpose of pulling together a complete and accurate picture of what is happening within this role, I have drawn on multiple data sources as described in the Sources of Evidence section above (see Table 3.1: Sources of Evidence by Research Question) (Yin, 2009). Through the triangulation of data, I have kept an eye to both convergence and discrepancies in the information, as both can be revealing. Furthermore, consistencies within a MTSS coordinator's statements and actions across the study underwrite the trustworthiness of that participant. Coherence and connections between the participants' experiences strengthen the study's external validity (Seidman, 1991). Nevertheless, I do recognize that the effectiveness of the triangulation of the data may be

compromised given that the participants in this study all share the potential for self-reporting bias (Mathison, 1988; Yin, 2009).

### **Participant Reactivity**

Participant reactivity is most likely to have occurred in the interview portion of data collection, although participants may also have reacted to my presence in training sessions and meetings. Since participants were aware of my objective to use the knowledge gathered in this study to provide MiBLSi with a formative assessment of the design and enactment of their supports, they may have tempered or tailored their comments, depending on their perspectives. Suspecting that there is a somewhat evaluative aspect to the study, participants might have attempted to find and offer a (nonexistent) “right” answer, or they may have inflated their own successes vis-à-vis their enactment of the initiative (Yin, 2009).

This validity threat is best dealt with by building a comfortable working relationship with the participants and by interviewing and observing them in the most natural settings possible. Before interviewing and observing the MTSS coordinators individually, I took the opportunity to introduce myself to each of them at a statewide MiBLSi event. Additionally, I engaged in casual conversation with each of them during breaks in the events I observed. We exchanged pleasantries at the beginning of each interview, and then I conducted the interviews in a conversational manner, rather than in a formal question-answer format. The interviews were held at times and locations selected by the interviewees.

To further minimize participant reactivity, I conducted an informal visit to each MTSS coordinator’s District Implementation Team prior to my formal observations for data collection. In this way, I was able to meet the other team members, allow them to become comfortable with my presence, and gain a sense of their roles and interactions during the meetings. During both the informal and formal observations of the District Implementation Team meetings, I sat among the participants so as not to stand out visually as a researcher.

Despite these efforts, I did notice one instance of reactivity during my observation of a Regional Focus Planning Session (RFPS). A group of meeting attendees who were not among my primary study participants and who were thus unfamiliar with me began to speak about an unknown topic in hushed tones and with sideward glances in my direction. Although I could not hear their conversation, when one of them said, “We need to talk about this in another setting,” I chose to leave the room to give the team space to speak confidentially. Upon my return a few minutes later, the topic of conversation had apparently changed, the group was interacting freely, and the mood was comfortable and congenial.

### **Limitations and Delimitations**

Although the research for this dissertation was well-planned and carefully conducted, I recognize that it is subject to imperfections. Some of these (the limitations) are the inevitable consequences of undertaking qualitative case study methodology. They are the potential drawbacks of the study that lie beyond my control. Others (the delimitations) reflect the ways in which I defined the scope and boundaries of the study and, in some cases, represent aspects of the study that I would change were I to conduct it again (Simon, 2011).

### **Generalizability**

Any small, qualitative study carries the burden of context specificity. Because the study was conducted with a small sample of coordinators within a single statewide project, it would be reckless to assume the results are generalizable beyond MiBLSi. Initially, MiBLSi’s Core Planning Team was concerned that the results might not even be generalizable across MiBLSi itself, given the small sample size. Thus, before using the findings from this study as the foundation for making changes to the ostensive role design and the system of supports for MTSS coordinators, the Core Planning Team conducted a survey of all MTSS coordinators, to verify that the experiences and perspectives of the three participants were representative of the population of MTSS coordinators.

For this particular study, it would have been nearly impossible to avoid this limitation, since the purpose of a qualitative case study is to closely observe lived experiences within a given context. Additionally, as far as I am aware, the district implementation model and the ISD-level MTSS coordination function are unique to MiBLSi, which precludes me from including representatives from other initiatives in the sample. Finally, I was bound by the physical and logistical constraints of being a solo researcher; depth and intricacy would have been sacrificed if I were to expand the study to include additional participants.

### **Chance of Timing**

Another challenge I faced with this study was that I was only able to observe the MTSS coordinators at select times and in certain situations. Generally, I was able to observe the formal situations in which the coordinators were leading or participating in meetings and trainings. However, I was not able to capture most of the informal interactions and individual tasks of the role first-hand. In addition, time and logistics prevented me from attending every formal event with every participant; I was, at times, compelled to make strategic choices. This opened the study to two potential issues concerning the observational data I collected: an imprecise picture of the daily work of the coordinator and the disproportionate inclusion of certain components of practice.

**Daily work.** One real challenge came in gaining a picture of the coordinators' day-to-day, behind-the-scenes work. Barring becoming a full-time shadow of each participant, which would have required the ability to alter the space-time continuum, observing the daily grind of MTSS coordination proved elusive. I decided, therefore, to use detailed interviews to capture the elements of practice that I was unable to observe first-hand. While the MTSS coordinators should not have had reason to be untruthful in sharing the details of their daily work, there are many caveats to self-reported data, as I discussed above.

In the future, were I to conduct a similar study, I can envision a few alternate resolutions for this delimitation. I would consider, for example, asking the coordinators to record their tasks at regular intervals in a structured work log. While this would not eliminate the potential for self-reporting bias, it might provide a more accurate picture of the real demands of the work across time. Another viable alternative could be to conduct periodic drop-in observations of the coordinators to increase the odds of observing the full scope of how they enact their role.

**Inclusion of components of practice.** As it happened, the observational data in this study was not distributed evenly across sources. Due to scheduling and accessibility, I attended some events, such as the MTSS Coordinator Network meetings, disproportionately more frequently than others. It is possible that this colored my findings regarding the privileging of certain components of MTSS coordination, owing to the fact that I observed them more often in the field. I accommodated for this delimitation by placing interviews at the forefront of my analysis and using the observational evidence in a supporting role, to affirm, question, and illustrate the information gathered through interviews.

One way to avoid this potential delimitation in future studies might be to conduct the data collection in two phases: interviews followed by observations. By doing this, I could analyze the interviews for privileged components of practice then schedule the observations in proportion to that privileging. However, this might also be problematic in that I would be going into the observations with a predetermined sense of privileging.

### **Researcher Stance**

While it was not part of the original study design, during my dissertation process I made the strategic choice to become a very active participant-researcher with MiBLSi. At the onset of this study, I had no knowledge of or connection with MiBLSi or any of its staff or

partners. As I began to interact with the Core Team, I developed a respectful professional relationship with several of its members.

Each year, the MiBLSi grant sets aside funding for graduate students through its Higher Education Learning Partners (HELP), to support research about the project. The expectation is that the students will share their findings with MiBLSi staff toward the aim of strengthening the project. Before I began collecting data, I was offered - and accepted - one of these grants to offset the cost of travel to and from interviews and observations around Michigan, as well as other miscellaneous research expenses such as interview transcription.

During the time in which I was collecting data and working under the HELP grant, my professional relationship with the MiBLSi Core Team continued to deepen through interactions at statewide meetings, sharing of feedback based on my preliminary data analysis, and interviewing key team members. As this relationship progressed, the MiBLSi Core Team became aware that my professional and academic background went beyond my years as a classroom teacher to include experience with educational leadership and professional development for educators.

In November 2013, I was approached by MiBLSi's Core Team about the possibility of working for the project, to assist in designing and presenting professional learning opportunities for MTSS coordinators. I was interviewed by several members of the team in February 2014, and was offered a part-time position as a MTSS Coordinator Network Support consultant in the spring. I accepted the offer on the condition that the contract would begin after my initial data collection was complete. My final participant interview was on July 1, 2014, the date that my consulting contract began.

My role as a HELP partner and an external consultant afforded me exceptional access to the inner workings of the MiBLSi organization, including in particular the continuous improvement process as it applied to the system of supports for MTSS coordinators. This

role also allowed me to share the findings of my research as I was discovering them, putting this study to practical use before it was even completed.

As I will discuss in Chapter VI (Findings: Continuous Improvement), my dual role as researcher and subject complicated my analyses, particularly in that it was not part of the original study design, requiring me to sort out my functions as I executed them. While the unforeseen duality of my perspectives opened the study to unforeseen biases, the complexity also created a richer experience and a deeper understanding of the findings than if I had remained impartial.

It is possible that my position within MiBLSi colored my objectivity as a researcher and could be construed as a validity threat or a conflict of interest. I participated in the setting of goals for the project and had a vested interest in, and some influence over, achieving them. However, I have found a healthy synergy between my consulting work and my research. When I designed and proposed this dissertation, I had every intention of providing feedback for growth directly to MiBLSi. My professional position with the project did not hinder my ability to achieve that objective; in actuality, my role facilitated this process by continuing my access to MiBLSi and increasing my familiarity with its staff, structure, policies, and practices. Because my communication with MiBLSi staff was ongoing, I shared my feedback to the project concurrently with my analysis and writing, rather than after-the-fact. Additionally, I have been able to draw from this participation in MiBLSi's continuous improvement process to support and enhance the findings from my initial data collection.

While I was able to embrace my evolving and complex duplicity in this study, in the future I would build this into the research plan, specifying in advance the ways in which I intended to include myself in the study while minimizing the potential for bias.

## **Conclusion**

In the chapters that follow, I share the findings that have emerged from the data that I collected and analyzed to address the research questions that drove this embedded case study. I begin with an investigation of the design for practice for MTSS coordinators. I then move to the interpretation and enactment of the role by the coordinators themselves. Finally, I explore the ways in which MiBLSi engages in continuous improvement surrounding MTSS coordination. My deep experience examining these questions provides a first-hand, context-embedded perspective that enhances the conceptualization of this type of role in action within a large-scale school improvement initiative.

## CHAPTER IV

### FINDINGS: DESIGN FOR PRACTICE

*What are the specific designs for the day-to-day practice of network-based consultants? How do the documented and voiced representations of these designs align with one another? What competencies are privileged in these representations of the designs? What guidance is provided to support the implementation of these designs and the development of these competencies?*

#### Introduction

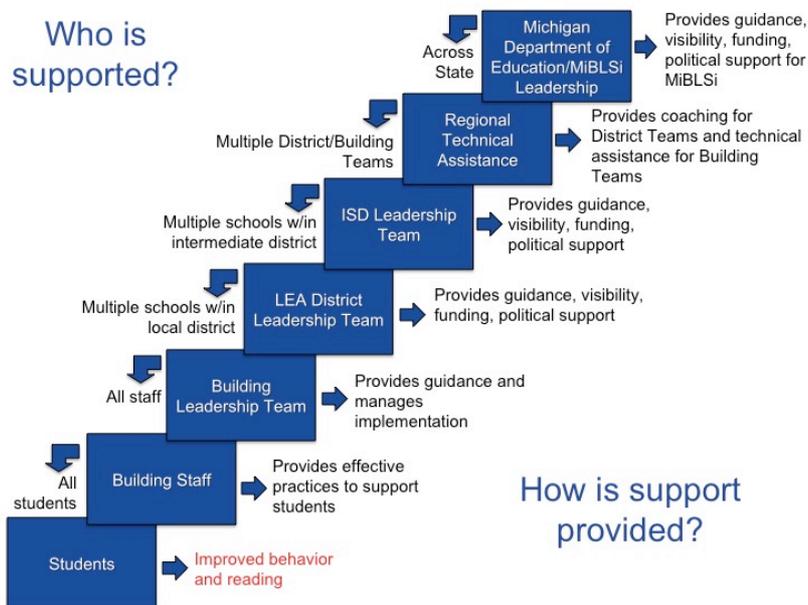
The network-based MTSS coordinator is a complex and developing role that is critical to the success of MiBLSi's district implementation model and unique to MiBLSi. Because it is neither a straightforward nor a commonly recognized role, I posed this set of questions with the basic purpose of identifying what the MTSS coordinators are supposed to do and in what ways they are supported in doing that.

Fostering the capability of a district to install and sustain MTSS within its buildings is a relatively new endeavor. According to one of MiBLSi's architects, it is only in the past four years, since the project moved from a building-level to a district-level implementation model, that the ISD-level MTSS coordinator role has been warranted. Before this shift in models, MTSS-related training and coaching was provided for individual school buildings. Within the current district implementation model, systemic support is warranted at the district level. The MTSS coordinator role arose from the need to build the capacity of districts to support local implementation in the interest of fidelity, scalability, and durability of the MTSS model.

In MiBLSi's cascading model of support (See Figure 4.1: MiBLSi Statewide Cascading Structure of Support), in which actors at each level of the system are responsible

for supporting those on the subsequent step, MTSS coordinators play a linchpin role: they are the supportive connections between regional technical assistance and the ISD and local district leadership and implementation teams. With direct support from regional Technical Assistance Partners (TAPs), access to a range of material resources, and ongoing professional development from MiBLSi, they organize and coordinate the work of implementation at the ISD and district levels. The ultimate objective of their work is to build the capacity of local districts to sustain MTSS without external support.

**Figure 4.1: MiBLSi Statewide Cascading Structure of Support**



The role of a regional-level MTSS implementation consultant appears to be unique to MiBLSi. My search of a dozen states’ MTSS structures yielded no designations for this position. A few states, including Florida, Utah, and Vermont, include *systems coaching* as a function. Florida defines systems coaching as the “application of a set of skills that provides dynamic support and facilitation to develop the capacity of school or district teams to implement MTSS aligned with the school or district improvement plans in order to enhance student outcomes” (March & Gaunt, 2013, p. 2). While this function sounds similar to MiBLSi’s MTSS coordination, Florida’s role description articulates that multiple members

of the district leadership team will contribute to the systems coaching function, rather than one regional specialist. Florida's model warns against presuming that one individual would be capable of providing the full scope of systems coaching (March & Gaunt, 2013); this provides evidence of the enormity and complexity of the MTSS coordinator role in MiBLSi.

### **Analytic Framework**

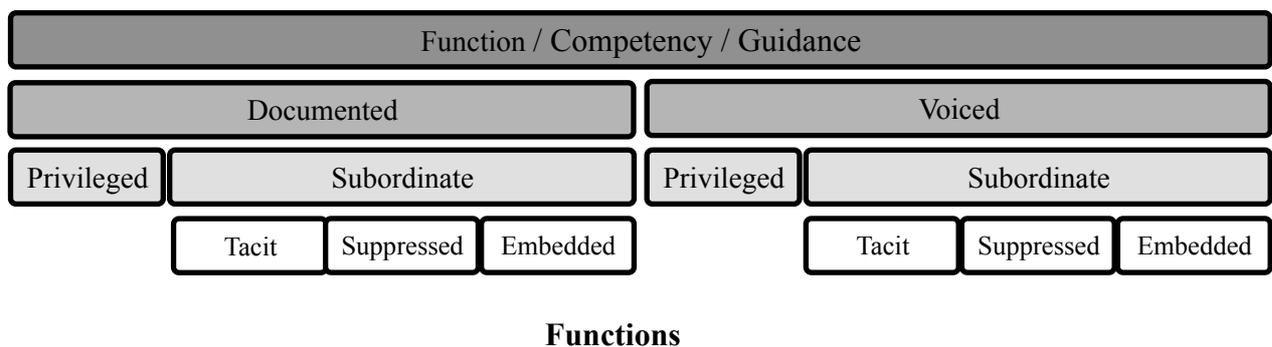
My objective in addressing this set of research questions is to identify the role expectations of the MiBLSi MTSS coordinators. One could approach this mission in a simplistic manner, by reiterating the information included on the design documents, supplemented by some illustrative commentary from both architects and users. However, the thought-provoking aspect of this chapter lies in going beyond what is visibly available and readily accessible, in search of a deeper comprehension of the role as it is designed and as it is interpreted, and the interplay between the two.

As I discussed in Chapter 2, Feldman and Pentland (2003) identified two aspects of organizational routines: the *ostensive*, which is the routine in principle, and the *performative*, which is the routine in practice. Feldman and Pentland (2003) extended the ostensive aspect of routines to include both formal, codified procedures and informal, accepted standards of practice. Building on this distinction, I have devised an analytic framework that allows me to observe the interaction between the ostensive role specifications as represented in written doctrine (*documented*) and how they are expressed by organizational leaders (*voiced*) (See Figure 4.2: Analytic Framework: Design for Practice).

Once the documented and voiced representations of practice are specified, variations between the role as written and the role as interpreted by its architects will surface. It is at this point that we can begin to examine whether and how people across the organization emphasize some portions of the documented representation in their voiced representations, while deemphasizing others. Furthermore, the elements that are subordinated can be

categorized as tacit, suppressed, or embedded, depending on why and how they have not been privileged in the representation. Those that are tacit are simply unspoken, whereas those that are suppressed have been overtly deemphasized. An embedded element is folded within the description of another, privileged element. The privileging or subordination of documented elements of the role is reflected in whether the voiced representations reinforce, enhance, and/or confront the content of the documented design.

**Figure 4.2: Analytic Framework: Design for Practice**



To unpack the design for practice for MTSS coordinators, I first examined the documented representation of the role. For this part of the analysis, I primarily used the MTSS coordinator Practice Profile and its Critical Components to identify the specifications for practice. I also drew upon the MTSS Coordination page of the MiBLSi website. To inform my depiction of the voiced representations of the MTSS coordinator role and the guidance for those enacting it, I looked to members of the MiBLSi Core Team and some of the Technical Assistance Partners for their explanations. Their perceptions were shared primarily through one-on-one interviews; in a few cases, observational data supplemented my analyses.

The vision of the Core Team and other key staff members is important to the enactment of the role, as these are the individuals who drive the design of professional supports for MTSS coordinators and who supervise - and often provide - those supports. For

this study, I interviewed four of the six Core Team members, to learn how each of them frames the expectations for MTSS coordinator functions and competencies.

The documented and voiced designs for practice include functions and competencies. Functions are the actions that the MTSS coordinators are expected to take; competencies are the skills and knowledge they need to take these actions effectively. Although they are conceptually intertwined, in order to unpack the intricacies of the design for practice I will address the functions in this section and the competencies in the next section, followed by guidance for developing practice, then bring them all together in the discussion.

### **Documented Representations: Functions**

The documented representations of practice for MTSS coordinators can be found on the MTSS Coordination page of the MiBLSi website and in the MTSS Coordinator Practice Profile. These exemplifications of the roles and responsibilities for MTSS coordinators characterize their ideal functions and capacities, as envisioned by the MiBLSi Core Team when the MTSS coordinator position was conceptualized.

**MiBLSi website.** The MTSS Coordination page of the MiBLSi website offers a brief overview of the function of MTSS coordination: “The MTSS coordinator works to ensure implementation fidelity while developing local implementation capacity.” The description goes on to offer the following summaries to clarify the role:

- Ensuring implementation and fidelity means that educators and leadership team members acquire and improve the skills and abilities needed to implement the defined set of practices with fidelity. They can then generalize new and fragile skills to real world settings (classrooms, hallways, team meetings)
- Develop local implementation capacity means that educators and team members develop a conceptual understanding of the core elements of the practices and processes by focusing on the functions of key program features and develop the skills and ability to implement these core elements of the practices. (Coordination of Multi Tiered System of Supports (MTSS))

In short, MTSS coordinators are, per this statement, charged with facilitating the implementation of MTSS with fidelity at the local level.

**Practice Profile.** MiBLSi uses Practice Profiles to communicate detailed definitions of roles and functions within the organization. The Practice Profile was first conceived by Loucks and Crandall (1982) as “a standardized, systematic, cost-effective tool for summarizing the components and requirements of a program” (Loucks & Crandall, 1982, p. 1). In MiBLSi’s adaptation, the Practice Profile consists of a comprehensive description of the essential elements, or *Critical Components*, of a given role or practice. Each Critical Component is described thoroughly in behavioral terms, and includes a range of acceptable and unacceptable variations. (See Appendix D: MTSS Coordinator Practice Profile for complete document)

Before identifying and describing each of the Critical Components, the MTSS Coordinator Practice Profile sets the benchmark for practice in the following introductory statement:

MTSS Coordinators Contribute to the MTSS Vision by:

- Developing effective practices through a continuum of supports: training, coaching, leadership, evaluation, and organizational system that are supported by evidence. Practices and supports integrate the implementation research and address all levels within the cascading model of support.
- Evaluating the effectiveness and efficiencies of the above continuum of supports through a continuous improvement cycle at all levels (MiBLSi MTSS Coordinator Practice Profile, 2014, p. 2).

This overview of the MTSS coordinator role is followed by explicitly detailed expectations, outlined in a 22-page document comprising seven Critical Components of MTSS Coordination. The MTSS Coordinator Practice Profile states that, “related to a specific job/role, critical components include the big ideas you would cover if someone asked you to briefly describe your job” (MiBLSi MTSS Coordinator Practice Profile, 2014,

p. 1). They form the documented representation of the core responsibilities associated with the role.

**Critical Components.** The Critical Components of a Practice Profile signify distinct aspects of a role or program. For MTSS coordinators, the following seven Critical Components are specified in the Practice Profile:

- Organize, coordinate, and co-facilitate the work of the ISD and District Implementation Team
- Develop and support local training capacity
- Develop and support local coaching capacity
- Guide problem-solving through data based decision making
- Deepen personal knowledge of MTSS data systems, practices, and the implementation research
- Develop a plan for continuous learning for Implementation Team membership and appropriate staff
- Effective Communication

**Figure 4.3: MTSS Coordinator Practice Profile: Sample Dimension**  
 Critical Component: *Deepen Personal Knowledge of MTSS Systems, Practices, and the Implementation Research*<sup>9</sup>

<b>Ideal “Gold Standard”</b> <i>All items within the category are in place</i>	<b>Acceptable Variation</b> <i>A description of work here takes the place of the related Gold Standard</i>	<b>Unacceptable Variation</b> <i>One or more item(s) is occurring</i>	<b>Harmful Variation</b> <i>One or more item(s) is occurring</i>
Demonstrates deep knowledge of the data, systems, practices, and implementation research necessary in a MTSS model and works with the Liaison to ensure professional development opportunities are aligned with the goals for implementation of MTSS and with the research base.	Until personal learning has been sufficiently deepened, the MTSS coordinator utilizes coaches or external MTSS consultants to deepen staff knowledge and provide structured learning opportunities.	Due to a lack of personal knowledge of the research base or a lack of consulting with others, MTSS coordinator adheres to the research base by not expanding beyond a small set of select practices with leads to the professional development not being responsive to local needs.	Does not develop sufficient personal knowledge of the research base, or does not consult with others to ensure alignment with the research base of professional development opportunities resulting in practices that do not fit within the vision are held.

For each of these Critical Components, the Practice Profile provides a number of dimensions, each with a thorough descriptor of its *Gold Standard* practice, *Acceptable Variation*, *Unacceptable Variation*, and *Harmful Variation*. The Gold Standard is the exemplary enactment of the practice that “can be accomplished under ideal conditions and establishes a mark for which to strive” (MiBLSi MTSS Coordinator Practice Profile, 2014, p.

<sup>9</sup> (MiBLSi MTSS Coordinator Practice Profile, 2014)

1). The Acceptable Variation represents appropriate and adequate performance that does not quite meet the Gold Standard, whether due to the skills and knowledge of the MTSS coordinator or due to contextual factors. Unacceptable Variations are those that fall short of the Acceptable range in that they may hinder implementation efforts, while Harmful Variations are expected to have adverse effects on the success of implementation (MiBLSi MTSS Coordinator Practice Profile, 2014) (See Figure 4.3: MTSS Coordinator Practice Profile: Sample Dimension).

### **Voiced Representations: Functions**

**Privileged functions.** Among the Core Team members whom I interviewed about the MTSS coordinator role, two broad functions emerged repeatedly: coordination and management of the local MTSS implementation process and communication and relationship-building. The prevalence of these two functions demonstrates privileging by the Core Team of two of the Critical Components in the Practice Profile: organize, coordinate, and co-facilitate the work of the ISD and District Implementation Teams (which, from here on, I will truncate to “organize, coordinate, and co-facilitate”) and effective communication. Their voiced representations of MTSS Coordination reinforce and enhance the documented representation of this work. The remaining Critical Components were subordinated by the Core Team and will be discussed in the subsequent section.

#### ***Organize, coordinate, and co-facilitate the work of the ISD and District***

***Implementation Teams.*** The most privileged MTSS coordinator function to emerge from the Core Team interviews – the only one to achieve full consensus - aligns with the organize, coordinate, and co-facilitate Critical Component of the Practice Profile. One MiBLSi Core Team member asserted that the MTSS coordinator role should truly be centered on coordination – that is, facilitating the work of others to train, coach, and evaluate. In this way, the MTSS coordinator role is fundamental in the effort to build the capacity to sustain

MTSS in local districts. This voiced representation of organize, coordinate, and co-facilitate reinforces and enhances the documented representation by embedding the two capacity-building Critical Components (develop and support local training capacity; develop and support local coaching capacity) into the organization function.

Further reinforcing the documented representation of this Critical Component, other Core team members defined the role of the MTSS coordinator as helping organize the work of MTSS Implementation in reading and behavior across the ISD, ensuring that the structures are in place and that all stakeholders have a deep understanding of the MTSS model and of the implementation process. Once the stakeholders' knowledge base has been established, the MTSS coordinator's role is, per one Core Team member, to "support that implementation at the district level across the district team, the trainers, the coaches, and the building level teams." Again embedding the capacity-building Critical Components into facilitating the implementation process, MTSS Coordination was described as supporting training and coaching efforts at both the building and district levels.

The Core Team elaborated that the coordinator brings MTSS knowledge to actors at all levels of the ISD as well as the district team, and then guides them in translating that knowledge into a district-wide system of supports for students. This support can come through the identification of arising needs that surround implementation and the mobilization of resources to ensure that those needs are met. It also suggests that the MTSS coordinator have a deep knowledge of the systems and practices of MTSS, linking with yet another element of the Practice Profile (Deepen Personal Knowledge of MTSS Data Systems, Practices, and the Implementation Research).

Again reinforcing the Practice Profile, one Core Team member described MTSS coordination as helping people at the ISD and district level to see the big picture of MTSS, then guiding them through the details that will ultimately paint that picture. They envision

collaborative work between the MTSS coordinator and the ISD and District Implementation Teams to enact the vision for MTSS implementation and to set up the infrastructure to realize that vision.

***Effective Communication.*** Along with organize, coordinate, and co-facilitate, effective communication was privileged as a vital function of MTSS coordinators in the Core Team interviews. My conversations with the Core Team members revealed that they view communication as a mechanism through which relationships are built and the objectives of MTSS coordination and implementation can be realized.

One Core Team member highlighted the importance of communicating productively in the interest of building mutually respectful relationships with ISD and district administrators. Enhancing this observation, another Core Team member emphasized the importance of the relationship and communication between the MTSS coordinator and the ISD liaison. This liaison is typically an administrator who has “one foot in the implementation team, one foot in the cabinet,” and therefore carries the potential to be very influential in terms of breaking down administrative barriers to implementation. A third Core Team member reinforced that comment, saying that without trust between the MTSS coordinator and the district-level liaison, “the interactions are more surface level” and problems not only lay unsolved, but may be exacerbated due to miscommunication or a lack of understanding on the part of the stakeholders.

Supporting the case for communication and relationship-building is a concern about the potential balkanization of roles with the delegation of skills and knowledge, in that, as a Core Team member stated, if “there isn’t any intentionality to integrate those [roles], then you end up running parallel systems, and that’s not really effective.” It is communication among and between roles and their players across the system that enables the sharing of skills and knowledge in the interest of collaboration.

**Subordinate functions.** Two of the MTSS coordinator functions that are documented in the Practice Profile as Critical Components were clearly privileged in the Core Team’s voiced representations; the other five were not. None of these five subordinate Critical Components was directly confronted or overtly suppressed in the interviews, however. At times they were embedded within the privileged components; for the most part they were tacit, simply left out of the conversation. As an example of the inclusion of subordinate components within a privileged one, when one Core Team member included the development of local training and coaching capacity in the definition of coordination, this enhanced the documented representation of the role functions, which treats them as separate entities.

The subordination of Critical Components is telling. Not mentioning them or their components is evidence that they do not have the attention of the Core Team, and therefore are not deemed to be central to the MTSS coordinator role. In fact, in the months since these data were collected, the Core Team and other MiBLSi staff have concluded that some of these Critical Components, such as *develop a plan for continuous learning for implementation team membership and appropriate staff*, which was never mentioned in any Core Team interview, are not essential functions of MTSS Coordination; they will be removed from the Practice Profile. Others, including *deepen personal knowledge of MTSS data systems, practices, and the implementation research* will be embedded into other Critical Components in an upcoming overhaul of the MTSS Coordinator Practice Profile.

### **Discussion: Functions**

The documented representation of the design for practice – the Practice Profile - offers a lengthy, detailed description of the formal role expectations for MTSS coordinators. This blueprint offers descriptors for multiple dimensions of each Critical Component. The voiced representations of the design for practice – the interpretations of the MTSS

coordinator role as expressed by the Core Team – demonstrate the priorities of the architects for the enactment of the role. These priorities are expressed through what the Core Team members include in their role descriptions, as well as what they exclude.

The most apparent difference between the documented and voiced representations of the design for practice is in the privileging of certain components of the role. The Practice Profile objectively outlines the expectations for each of seven Critical Components, without assigning any apparent weight to one over the other. While the voiced representations of the Core Team do not confront the contents of the Practice Profile, they clearly privilege certain Critical Components over others. Those functions that were subordinated in the interviews were either embedded in the descriptions of the privileged components or were tacit.

The voiced representations of the role design expose the organization's priorities for the MTSS coordinator role in a way that the documented representation does not and cannot. The Practice Profile is a static, documented representation that was created as part of the vision for the MTSS coordination before it was carried out; the voiced representations are the current iterations of the Core Team's dynamic interpretations of this role as it is lived and as it has evolved. The Core Team members have been able to adapt their vision and their priorities while they observe the work of MTSS coordination in action. They have observed the professional expertise of the MTSS coordinators and the capital that they carry among the ISD and district leadership, which affect the scope of their influence and the ways in which they are able to carry out their role.

The learning that has come through analyzing the relationship between the privileged and subordinated Critical Components in the voiced representations can inform the future redevelopment of the documented representation to reflect the expectations and emergent priorities of the role as experience shapes them.

## **Competencies**

Once the design for practice has been specified, the next undertaking in this investigation is to determine which skills and knowledge are essential for carrying out the MTSS coordinator role as designed. For this analysis, I have again turned to the Practice Profile for the documented representation. Since the competencies required of the MTSS coordinators for each element of practice are not spelled out in the Practice Profile, I used open coding to identify and categorize the skills and knowledge associated with each of the practice indicators in each Critical Component.

As with the functions, I drew evidence from the Core Team interviews for the voiced representations of competencies. I coded these interviews for mention of skills and knowledge, using the same codes as I did with the Practice Profile. This allowed me to compare the privileged and subordinated competencies among the Core Team members and between the voiced and documented representations. This comparison brings to the surface a more precise depiction of the priorities for MTSS coordinators' competencies, and could inform the clarity of the role expectations, the selection of candidates for the role, and the relevance of professional development and support offered by MiBLSi.

### **Documented Representations: Competencies**

The Critical Components in the Practice Profile represent a broad range of tasks and responsibilities that require a wide array of skills and knowledge. Upon close analysis of the practice indicators for each Critical Component, I identified 142 discrete competencies, which I coded and sorted into 12 categories. I then matched each of these categories of competencies with the Critical Components in which it is relevant, per the Practice Profile. (See Table 4.1: Competencies within Critical Components; See Appendix E: Analytic Tables for complete analytic tables).

**Privileged competencies.** Within the Practice Profile, a number of competencies are pervasive across the Critical Components; others are represented less frequently. I have classified those competencies that are required to carry out the majority of the Critical Components of practice as privileged in the documented representation. I have categorized the remaining competencies as subordinate, since while they may be desirable professional qualities and contribute to the success of MTSS Coordination, they are less present within this documented representation.

The competencies that are most privileged in the Practice Profile are communication skills, assessment skills, and knowledge of MTSS and implementation science; each of these is represented in six of the seven Critical Components. Following closely are interpersonal skills; data collection, management, and analysis; training expertise; and knowledge of the local context, each appearing in the practice indicators of five Critical Components.

**Communication skills.** Communication is crucial to the role of the MTSS coordinator, as evidenced by the Practice Profile. The project designers have identified it as so critical to the role that it merits its own Critical Component: effective communication. However, its ubiquity extends well beyond this Critical Component. Throughout the Practice Profile, one finds practice indicators that rely on effective communication. The only Critical Component to not specify any communication skills is guide problem-solving through data based decision making, which, arguably, would also benefit from this competency.

Multiple aspects of communication are represented in the Practice Profile. For example, there is the ability to communicate information for meetings, the competence to negotiate, and the skill to effectively deliver training content. Communication, per my analysis of the Practice Profile, includes not only the delivery of a message or information, but the ability to discern which information is relevant, to determine which mode of

communication is appropriate for a particular interaction, and to modify the message to fit the recipient.

***Assessment skills.*** According to the Practice Profile, MTSS coordinators are expected to be able to assess multiple types of situations and correspondingly address them. For example, in develop and support local training capacity, the performance indicators suggest that the MTSS coordinator be able to assess current training capacity, as well as determine how much support local trainers need to be successful and when and how to withdraw or reinstate external support. To organize, coordinate, and co-facilitate the ISD and district implementation teams, the ability to recognize indicators of task completion (or non-completion), to diagnose what is or is not working and why, and to identify successes, needs, and obstacles are all indicated as important skills.

***Knowledge of MTSS and implementation science.*** As MTSS coordinators are facilitating the sustainable, durable, successful implementation of MTSS, one of the vital competencies to their work is a strong operational knowledge of MTSS systems and practices and implementation science. Although the Practice Profile does not call for the knowledge of specific MTSS instructional practices (e.g. reading instruction), it does designate the need for a deep understanding of the infrastructures necessary for MTSS implementation. It also requires a familiarity with, and access to, the research literature on MTSS and implementation science.

***Interpersonal skills.*** Interpersonal skills impact multiple facets of MTSS coordination as described in the Practice Profile. In order for the MTSS coordinators to effectively facilitate the challenging and complicated implementation work in ISDs and districts, they need to build trust and establish strong professional relationships with the stakeholders. This rapport-building relies on the familiarity with the implementation team

members, administrators, and other local power brokers and their strengths, challenges, and priorities.

***Data collection, management, and analysis.*** At the center of the MTSS model is data based decision making. The Practice Profile indicates that knowing how to access, manage, and use data is essential to the successful enactment of most of the Critical Components. The practice indicators describe a multitude of ways in which MTSS coordinators ought to interact with data. For instance, they should know which local data to collect, how to gather and organize it, and how to leverage it to create implementation plans. They are also expected to enable others on the implementation team to do use data in these ways. According to the Practice Profile, MTSS coordinators should be able to recognize the unique features and purposes of outcome data and fidelity data, and to communicate the functions of each type of data to others.

***Training expertise.*** In their consultancy role, MTSS coordinators serve as local trainers. Per the practice indicators, this requires some competency in the field of adult learning, taking audience-specific needs into consideration. The Practice Profile specifies that MTSS coordinators should be able to synthesize relevant information into structured learning opportunities. They are expected to have deep knowledge around the training content, which includes MTSS-specific data, systems, and practices; the implementation process; and the local educational context.

This competency does not only apply to delivering training, but also to developing the capacity of others to conduct training. To this end, the Practice Profile indicates the need for MTSS coordinators to be competent with co-presenting, which includes planning and coordinating presentations with co-trainers and having the flexibility to lead whichever portions of the training the local trainers are not ready to conduct.

**Knowledge of the local context.** In order to make MTSS implementation meaningful to local schools and districts, MTSS coordinators are expected to recognize local factors to which the model must be adapted. For example, a small, rural district will have different systemic needs than a large, urban district. One district might have serious behavioral issues, while its neighbor may grapple more with literacy. Local faculties bring different levels of expertise and experience with multi-tiered interventions. The Practice Profile indicates that local context knowledge is a priority in MTSS Coordination, including it as a performance indicator in almost all of the Critical Components.

**Table 4.1: Competencies within Critical Components**  
(Documented Representation)

Critical Components →  Types of Skills or Knowledge Required ↓	Organize, Coordinate, and Co-facilitate the Work of the ISD and District Implementation Team	Develop and Support Local Training Capacity	Develop and Support Local Coaching Capacity	Guide Problem-Solving through Data Based Decision Making	Deepen Personal Knowledge of MTSS Data Systems, Practices, and the Implementation Research	Develop a Plan for Continuous Learning for Implementation Team Members and Appropriate Staff	Effective Communication
Communication Skills	X	X	X		X	X	X
Assessment Skills	X	X	X	X	X	X	
Knowledge of MTSS / Implementation Science	X	X	X		X	X	X
Interpersonal Skills	X	X	X			X	X
Data Collection, Management, and Analysis	X	X	X	X	X		
Training Expertise		X	X	X	X	X	
Knowledge of Local Context	X	X	X			X	X
Time & Task Management	X	X	X		X		
Personnel Management	X	X	X				
Coaching Skills	X	X	X				
Leadership Skills	X	X	X				
Awareness & Use of Resources			X		X	X	

This competency is depicted in the Practice Profile as the knowledge of the local school contexts and the ability to recognize and design necessary and appropriate supports

for that context. It relies on a familiarity with existing district infrastructures and capacities and the identification of contextual variables that impact implementation supports.

**Subordinate competencies.** Where seven of the twelve competencies that I identified in my analysis of the Practice Profile are privileged, cutting across most of the Critical Components, the others are less prevalent. Those that are included in the performance indicators of four or fewer Critical Components are categorized here as subordinate. These skills are needed to achieve some of the performance indicators and enact the overall role successfully, but they are not overtly stated as critical to the majority of the Critical Components. The bulk of these subordinate competencies are embedded in, or intertwined with, privileged competencies. They serve to reinforce or enhance the primary competencies required to enact the role functions.

Several of the subordinate competencies reinforce and enhance, and also rely on, the privileged competencies: communication and interpersonal skills. These subordinate competencies include personnel management and coaching skills. These competencies indicate that the MTSS coordinators are expected to be able to inspire participation, communication, and responsiveness among their colleagues and the stakeholders.

Coaching skills incorporate the aptitude to establish an appropriate infrastructure for giving and receiving feedback to team members, and to facilitate the productive professional learning of others. Per the Practice Profile, MTSS Coordination requires the flexibility to adjust course in response to data and input from the implementation team, and to redirect or reprioritize team members' activities if they stray from the implementation plan.

While it enhances the MTSS coordinators' knowledge of MTSS and implementation science, and it reinforces the effectiveness of their communication, the Practice Profile subordinates the expectation that MTSS coordinators will be able to find and share relevant resources as needed to support the implementation process, to deepen the knowledge of

others, and to guide their own professional learning. This competency specifies that they demonstrate the ability to align their responses to issues and questions to the MTSS and implementation science research bases.

Time and task management and leadership skills are the competencies that allow MTSS coordinators to create the time and space to do the substantive work necessary for successful implementation. They are subordinate competencies in that they are tacit, not overtly present in many of the practice indicators, but they are silently pervasive in that they support the work as a whole.

Time and task management enables the MTSS coordinators to carry out their complex and time-consuming role, often in conjunction with other professional responsibilities. This competency includes, for example, creating and using systems for managing multifaceted tasks and processes and finding the time and opportunity to meet with all stakeholders.

Leadership facilitates the work of others. The competence to lead on various levels is implicit across the Practice Profile. The leadership skills that surface in the practice indicators include broad-scale leadership, such as the ability to lead systemic change and facilitating the flow of information among stakeholders, and smaller-scale leadership, such as efficiently and effectively leading a meeting.

### **Voiced Representations: Competencies**

In their interviews, MiBLSi's Core Team members not only shared their perceptions of the functions of the MTSS coordinator, but also the competencies needed to carry out those functions. In those depictions, the Core Team members alluded to a few competencies considerably more frequently than others; I have classified those as the privileged competencies. The subordinate competencies are the skills and knowledge that are included

in the practice indicators in the Practice Profile, but that were either minimally mentioned or were omitted from the interviews.

**Privileged competencies.** The Core Team members, in their interviews, privileged communication, interpersonal skills, and content knowledge over other competencies. Each of these competencies was mentioned numerous times by at least three of the four people interviewed. Some of the individuals referred to these skills in more than one interview, further solidifying them as priorities.

***Communication and interpersonal skills.*** The two most privileged competencies, per the voiced representations of the Core Team, are communication and interpersonal skills. Because of the frequency with which the Core Team members interconnected these two competencies in their interviews, often braiding them within a single sentence, I address them together in this section, rather than segregate them for the purpose of analysis.

The Core Team members talked about the importance of using communication to break barriers and build relationships in the interest of pushing the work of MTSS implementation forward. The key features of interpersonal skills that arose in the interviews were trust and collaboration with stakeholders, local power brokers, and colleagues. One Core Team member summed it up:

If [MTSS coordinators] are action-oriented and they are good communicators and they have good relationships with their team members so that they want to seek out those people and talk to them, and people want to hear them, I think that those experiences would prepare them well [for this role].

The Core Team appreciates the value of a background that includes interacting on multiple levels with people in multiple positions, and in recognizing the diverse informational needs of people in different roles on the implementation team. As another Core Team member expressed,

I think that they need to be really skilled in communicating across that group and knowing who are the people that you have to give information to right

away...making sure that no one feels out of the loop, that everybody feels that they know what they're supposed to do with the information that they get.

MTSS Coordination, in this depiction, hinges on ensuring that the right information is communicated to the right people, and that everyone is supported in using the information productively.

A concern expressed by the Core Team members with regard to both communication and interpersonal skills is the MTSS coordinators' ease in engaging in challenging conversations with ISD and district power brokers, something they all deemed as critical to successful and sustainable implementation. They do acknowledge that it can be difficult, uncomfortable, and even intimidating to talk to people in positions of power, as evidenced in this Core Team member's thoughts:

Being able to be comfortable...engaging in some frank, tough conversations with a person who's technically your superior or supervisor may be a little more difficult to navigate...I think that sometimes if you haven't had that experience, that can sometimes feel a little overwhelming.

When that professional relationship lacks confidence, the Core Team members have witnessed communication issues. For example,

What I've noticed is that if there isn't a lot of trust between the MTSS coordinator and that person who is in that [leadership] role, then the interactions are more surface level...If that trust isn't there, then I don't think some of the real conversations take place.

One Core Team member cited communication as the source of building that trust, saying that "if you...can't talk about the systems that are needed and very succinctly identify areas of strength and need then your value of being at the table is going to be marginalized." Another, echoing these priorities, connected communication and interpersonal skills as follows: "They understand how to build those relationships with people; how to engage people in conversations about things that might not be comfortable always, if there's philosophical differences, but they can do it in a way that's not confrontational."

Both communication and interpersonal skills were privileged by all of the Core Team members interviewed in this study. According to the Core Team, these are foundational competencies for effective MTSS Coordination and, in turn, successful implementation. One Core Team member stated that, as a MTSS coordinator, “You have to be...someone who can build positive relationships with people because you are leading. You are the linchpin of the work.” MTSS coordinators, from this point of view, use their communication and interpersonal skills to open the doors to district and ISD leadership. Without the support of those stakeholders, systemic change could not occur, and implementation would not be feasible.

***Knowledge of MTSS and implementation science.*** The third most privileged competency, as expressed by the Core Team members, is knowledge of MTSS and implementation science. This competency includes fluency with MTSS practices in reading instruction and behavior supports, as well as an understanding of the MTSS model, implementation science, and data systems. These aspects of content knowledge were often interwoven within their commentaries. Spelled out plainly in one interview, “[MTSS coordinators] need to not only understand those practices [evidence-based reading instruction, data analysis, and positive behavior supports], but they also need to understand the systems that are needed to get those practices implemented well.” This comment emphasizes the importance of MTSS coordinators moving beyond an understanding of MTSS practices to build expertise in implementation science and systems thinking.

Core Team members stated the belief that MTSS coordinators need high levels of knowledge with systems thinking and implementation science in order to facilitate the organizational and cultural changes required by the introduction of MTSS in schools and districts. Mused one Core Team member, “How do you get something like this kind of

reform, like this kind of systems change going? You have to understand how implementation science impacts that and be able to pay attention to that to move it forward.” The Core Team believes that an understanding of, and experience with, how to influence a system to embrace a new set of practices is a key to successful district-wide MTSS Coordination.

The privileging of content knowledge in implementation science also raises some concerns for the Core Team about the preparation of the MTSS coordinators, in that “we have some consultants who are functioning in this MTSS role right now who may understand the practices but when it comes to systems thinking...people can’t necessarily just overlay their knowledge of the practices onto the systems.” Content expertise does not necessarily equate to implementation expertise; knowing how to engage in evidence-based reading instruction with students, for example, does not in itself prepare someone to lead district-wide systemic change around these practices.

Just as often as they mentioned content knowledge around implementation science, Core Team members expressed the expectation that MTSS coordinators have strong understandings of the practices that MiBLSi promotes. Importantly, according to the Core Team, not only should they have background in reading and/or behavior systems, but this background needs to align philosophically with the practices that MiBLSi endorses. Said one Core Team member, “I want them to have some really deep skill in either reading or behavior where the research base that they are coming from is similar to ours.” This content knowledge allows the MTSS coordinators to assist the district implementation team with logistical questions about the practices as they begin to apply them in context. One Core Team member provided the following example:

If they know they’re going to be starting with PBIS [Positive Behavioral Interventions and Supports], even though you know the work right now is to build your district team, you need to start layering in some knowledge base about PBIS because the big question mark in their head is ‘what is this work I’m going to go and do?’ So you have to be building knowledge across

multiple areas right from the beginning and deepening knowledge with MiBLSi content and then sometimes outside of that.

The Core Team recognizes that they are setting the bar high for MTSS coordinators' content knowledge, expecting that they are competent both with implementation science and with MTSS-related instructional and behavioral practices. A Core Team member raised the concern that perhaps the project is expecting MTSS coordinators to know too much, and that there is a need to evaluate how much they really need to know to have the necessary expertise to lead others in this work. Said another, "When I think about everything that we really would need to do to make these folks feel competent in all areas, it's almost like we have to stop time for at least a year... And that's just not possible."

**Subordinate competencies.** The MiBLSi Core Team members clearly privileged the three competencies described above: communication, interpersonal skills, and knowledge of MTSS and implementation science. The remaining eleven competencies were subordinate in the voiced representations of MTSS coordination; each was mentioned a total of ten times or fewer in the ensemble of interviews. These subordinate competencies were either embedded or tacit, with several of them being completely or almost completely absent from the conversations. In a few cases, which I illustrate in this section, one Core Team member went against the aggregate trend to subordinate a competency. At no time did a Core Team member suppress a particular competency, explicitly stating that it was unimportant.

One MTSS coordinator competency that was largely tacit in the Core Team interviews is a strong knowledge of the local educational context in which they are assisting implementation. Although none of the Core Team members discussed context knowledge at length, they did identify it as reinforcing and enhancing communication and interpersonal relationships. According to these Core Team members, those familiar with the local context enter the role better equipped to navigate the political and philosophical landscape of the ISD and districts. In addition, three Core Team members shared the perspective that MTSS

coordinators, because they are embedded in the ISD and districts, are well-situated to identify local needs and potential barriers. They carry “a much greater understanding of contextual issues... [such as] political pressures, the current funding status, what are the beliefs” than an external partner could develop, and these issues are crucial in moving implementation forward.

Data collection, management, and analysis was only mentioned a total of seven times across the interviews, and one Core Team member did not include it at all in her commentary. When present, it was often included in a list of desirable qualities, along with other competencies, without further elaboration. In one instance, a Core Team member seemed to be privileging data use by stating, “I would expect them to know how to look at data in an ongoing way to make decisions.” However, this discussion of data use began and ended with that statement and the Core Team member moved on to talk about other competencies.

Only one Core Team member talked about the ability to train others in MiBLSi content; for the others, training expertise was a completely tacit competency. This respondent did not mention it frequently enough to have outright privileged it, but did refer to training skills several times when talking about prior experiences that would be useful for MTSS coordinators to bring to the role. This Core Team member talked about the importance of both knowing the content well and reading the needs of the group, in order to be able to cover the necessary material but also to respond to the specific needs of the implementation team. This was expressed as a selection question, citing MiBLSi’s need “to actually find people who can train and coach and move this along effectively at both the ISD and district level.”

Leadership skills, including proactively supporting the implementation team, helping colleagues see and follow the big picture of MTSS and implementation, and pushing the

work of implementation forward were also embedded within Core Team members' comments about the communication and interpersonal relationship competencies. They mentioned leadership in terms of running meetings and keeping the team focused on action, solutions, and moving toward a vision, rather than on barriers to progress. The MTSS coordinator, according to the Core Team, leads by facilitating the work of the team. It is, as one Core Team member described it, "being able to prompt people to keep the work moving forward, celebrate even tiny accomplishments...and help prompt them and nudge them along in the things that they haven't yet started to address."

Five competencies were completely or almost completely tacit (mentioned only once) among the Core Team interviews. These suppressed competencies include assessment skills, use of resources, personnel management, and coaching skills. As with the omission of role functions discussed above, the exclusion of competencies from the voiced representations of practice indicates that the Core Team does not deem these skills and knowledge as central to successful MTSS Coordination.

### **Discussion: Competencies**

In the sections above, I have described the competencies that the documented representation of practice for MTSS coordinators, namely the Practice Profile, has identified for the successful enactment of this role. I have also described the skills and knowledge that the Core Team members voiced as critical to MTSS coordination. Within these depictions, I have classified the competencies as either privileged or subordinate, based on the frequency with which they were included in the collective representations of practice.

The documented and voiced representations aligned in their privileging of a few competencies, and in their subordination of many of them. In some cases, a competency was privileged in the documented representation but not in the voiced representations; the inverse did not hold true for any competencies. For this analysis, I have named the competencies that

are privileged in both types of representation *highly privileged*. Those that are privileged in one type of representation and subordinated in the other, I have called *partially privileged*. The remaining competencies, which were subordinated in both the documented and voiced representations, remain *subordinate*.

**Highly privileged competencies.** Some of the competencies emerged from this analysis as *highly privileged*; that is, they were privileged in both the documented and voiced representations of MTSS coordinator practice. We can infer that these representations reinforce one another, and that they truly signify the skills and knowledge that are the most beneficial to MTSS Coordination.

**Table 4.2: Privileged and Subordinate Competencies by Type of Representation**

<b>Competency</b>	<b>Documented Representation</b>	<b>Voiced Representations</b>
<b>Communication Skills</b>	Privileged	Privileged
<b>Interpersonal Skills</b>	Privileged	Privileged
<b>Knowledge of MTSS and Implementation Science</b>	Privileged	Privileged
<b>Data Collection, Management, and Analysis</b>	Privileged	Subordinate
<b>Assessment Skills</b>	Privileged	Subordinate
<b>Context Knowledge</b>	Privileged	Subordinate
<b>Training Expertise</b>	Privileged	Subordinate
<b>Leadership Skills</b>	Subordinate	Subordinate
<b>Personnel Management</b>	Subordinate	Subordinate
<b>Time and Task Management</b>	Subordinate	Subordinate
<b>Coaching Skills</b>	Subordinate	Subordinate
<b>Use of Resources</b>	Subordinate	Subordinate

The highly privileged competencies are communication skills, interpersonal skills, and knowledge of MTSS and implementation science. These competencies reinforce and enhance each other, in that the strong MTSS coordinator has a deep knowledge of the content and processes necessary for successful implementation of MTSS, the capability of sharing that knowledge efficiently and effectively, and access to the stakeholders who need the information. They skillfully and appropriately employ multiple modes of communication to

connect people with relevant information. A Core Team member summed it up: “If they were really knowledgeable in MTSS...and really did also understand the administrative layer and knew how to interface with the power brokers, I think they would be very successful to have those [challenging] conversations.”

**Partially privileged competencies.** Another group of competencies is *partially privileged*. The partially privileged competencies are signified as high priorities in one type of representation but not the other. As it happens, all of the partially privileged competencies in this analysis are privileged in the Practice Profile but not in the Core Team interviews; none of the partially privileged competencies were privileged by the Core Team without being so in the Practice Profile. There are four competencies for which this divergence occurs: data collection, management, and analysis; assessment skills; context knowledge; and training expertise.

Data based decision making is foundational to the MiBLSi model as designed, so it is incongruous that data collection, management, and analysis was not a privileged competency in the Core Team’s depictions of successful MTSS Coordination. While it would be reasonable to interpret this as a confrontation – that the Core Team omitted this competency because its members disagree with its privileging in the documented representation of practice - this is not the most likely reasoning.

A more plausible theory as to why fluency with data is largely tacit in the voiced representations is because it permeates everything in the MiBLSi project, to the point where it has become an unspoken, universal function. Supporting this theory is the way in which Core Team members talked about data fluency the few times they did bring it up in the interviews. For example, one Core Team member included the statement that “Understanding the data systems and practices involved in the implementation of an academic and behavioral support model are a huge part of seeing implementation through.”

This type of comment implies that proficiency with data is an important and desirable quality in a MTSS coordinator, even if not dwelled upon in the interviews.

One competency that was privileged in the Practice Profile but largely tacit in the Core Team interviews is a strong knowledge of the local educational context in which they are assisting implementation. As with the data fluency, when context familiarity was broached in the interviews, the Core Team members all heralded it as highly beneficial to the role. One reason that it may not have been emphasized is that most of the MTSS coordinators are hired from within the ISD, so their knowledge of the local system can be reasonably assumed.

The final partially privileged competency is training expertise. This competency was only brought up a total of four times between two Core Team members. They expressed the hope that MTSS coordinators would come into the project with some prior training experience, particularly with MiBLSi; if they don't have the expertise, MiBLSi attempts to develop those skills through co-training and trainer workdays. This discrepancy in the emphasis of training expertise between the documented and voiced representations of practice may be a function of embedding. The Core Team members may have been incorporating training skills into their concepts of knowledge of MTSS and implementation science and communication skills, an assumption that could explain this inconsistency.

**Subordinate competencies.** The remaining competencies identified in this analysis are subordinate in both the documented and voiced representations of practice. Their placement on the back burner, intentional or not, does not necessarily indicate that they are not deemed beneficial to MTSS Coordination. More likely, rather than being central to successful MTSS coordination, they are seen as enhancing the work. These competencies include leadership skills, personnel management, time and task management, coaching skills and use of resources.

Some of the subordinate competencies can be directly linked to the successful enactment of partially or highly privileged competencies. For instance, coaching skills are enriched by communication skills and a deep knowledge of the content being shared, in this case MTSS systems and practices and implementation science.

In an ideal situation, MTSS coordinators would demonstrate all of the competencies represented in the Practice Profile and the Core Team interviews. In reality, MTSS coordinators are likely to show strength in some areas and struggle with others; given the variety of professional and academic backgrounds that the coordinators bring to the role, these strengths and challenges will vary among them. Those competencies that a MTSS coordinator lacks can be addressed through MiBLSi's focused and ongoing system of guidance and support.

### **Guidance**

The final undertaking in investigating this set of research questions is to identify the guidance that is offered to support the implementation of the design for practice and the development of the associated competencies. MiBLSi offers ongoing guidance and continual support for MTSS coordinators in the forms of consultation with Technical Assistance Partners, pre-planned implementation team meeting content, monthly MTSS coordinator Network meetings, guided trainer workdays, statewide coaching and implementation conferences, Regional Focus Planning Sessions (RFPS), and online professional learning modules. Drawing on the resources that MiBLSi provides, MTSS coordinators learn through experience to translate the design for practice into specific tasks within their ISD contexts.

As one MTSS coordinator described it, learning how to enact this role is

...a process. It is in no way an event. It's been...years of learning and continuing to learn every day. Other than having the multiple levels of support and understanding that it takes time, I don't know how we could better prepare someone for such a role.

The multiple facets of MiBLSi's support system allow the MTSS coordinators a variety of modes for assistance as they gain experience through practice.

My exploration of the documented representation of guidance for MTSS coordinators exposed a wrinkle in the analytic framework. There are some written materials describing various modes of guidance, such as explanations on the MiBLSi website and artifacts such as programs and agendas provided by MiBLSi, which clearly fall into the category of documented representations. However, for some modes of guidance, this written documentation does not paint a complete picture. Hence, I elected to include objective, informative data from my observations as documented representations of the guidance, to supplement the written records.

To inform my depiction of the voiced representations of the MTSS coordinator role and the guidance for those enacting it, I interviewed three members of the MiBLSi Core Team and three of the Technical Assistance Partners for their perspectives. Their perceptions were shared primarily through one-on-one interviews; in a few cases, observational data supplemented my analyses.

### **Documented Representations: Guidance**

**Technical Assistance Partners.** Technical Assistance Partners (TAPs) are an ISD MTSS coordinator's first and most consistent line of support. Working for MiBLSi at the regional level, TAPs are responsible for supporting implementation in ISDs, in large part through the MTSS coordinators. In particular, according to the posted job description, TAPs are expected to "[provide] direction, guidance, and support to ISD and district implementation planning teams (including MTSS/RtI Coordinators) for developing multiple levels of competency within the system to implement, with fidelity, a durable integrated reading and behavior MTSS/RtI model." In other words, TAPs share expertise and information between MiBLSi, MTSS coordinators, and the ISDs. Less formally, TAPs serve

as resources, coaches, and even emotional counselors in a collegial relationship with the MTSS coordinators.

The TAP function, like the MTSS coordinator function, is multifaceted and highly demanding. By design, TAPs provide side-by-side planning and training with the MTSS coordinators for the District Implementation Teams, they assist the ISD Implementation Teams in identifying MTSS-related goals, objectives, action plans, and strategies, and they help the ISD teams – MTSS coordinators included - to progress monitor their support for districts.

One of the key tasks of the TAP is to assist the MTSS coordinator in supporting the District Implementation Team (DIT). This aspect of their work may involve face-to-face meetings, emails, and/or phone calls with the MTSS coordinators as they plan and prepare for DIT training sessions. The TAP support includes connecting the MTSS coordinators with relevant resources, helping them to link the training content with the big ideas of MTSS, assisting them in modifying the training content to fit the particular contextual needs of the district, planning and rehearsing for the flow of the training session, and co-presenting the content at the DIT meeting.

Another element of the TAP role is to help the MTSS coordinators transition from their niched roles into system-level work. TAPs endeavor to build capacity of the MTSS coordinators to lead sustainable MTSS implementation at the ISD and district level. They use their familiarity with the MTSS coordinators and the local contexts to leverage competencies, identify successes, and address barriers, in the interest of ensuring that MiBLSi's processes and supports meet the needs of the ISD, district, and school personnel.

On top of their direct work with ISD and district implementation through the MTSS coordinators, TAPs participate in internal projects with MiBLSi, such as statewide

conference planning or implementation team content development. For the purposes of this report, I will focus intently on their support of MTSS coordinators.

**District Implementation Team Content.** MTSS coordinators lead regular DIT training sessions about once per month. The MTSS coordinator's role during these meetings is that of a trainer and facilitator. They familiarize the DIT members with MTSS structures and implementation science, guide them through decision making processes, and encourage the completion of action steps toward successful MTSS implementation.

The MiBLSi model includes a scope and sequence for District Implementation Team work, grounded in implementation science. Districts come into the process with various levels of preparation and experience, and may take more or less time to move through each phase and might need to cycle back to previous phases before moving forward. By design the trajectory of the model moves from exploration and adoption, through installation and initial implementation, to elaboration and continuous improvement. Each of these stages requires particular steps to be taken in terms of readiness assessment, data based decision making, and planning activities (Fixsen D. L., Blase, Naoom, & Wallace, 2009).

To aid in the consistency of DIT actions and the fidelity of implementation, MiBLSi has prepared materials for use at each DIT meeting. These materials include Power Point slides, guiding notes, and supplemental readings. With the guidance of their TAPs, MTSS coordinators are permitted – and, under some circumstances, encouraged – to modify the content and materials to fit the local context, while keeping with the essence of the designed model. Timing and pacing are common facets of the content to be modified, and are easily adaptable without compromising fidelity. Some of the language or information on the Power Point slides may be edited to reflect the specific context of a local district, or possibly the preference of the presenter. Training activities may be altered to accommodate team size,

configuration, or disposition (e.g. a whole group discussion may replace paired conversations in a small team).

The prepared DIT content promotes consistency within and fidelity to the implementation process. Even when customized to fit a local context, these materials provide a direction for progress and a framework on which to base the implementation process. The clarity provided through the content allows the MTSS coordinator to focus on its application, rather than on its design. In addition, to create content requires both time and deep knowledge that people in this role do not necessarily have at their disposal.

**Trainer workdays.** In 2013-14, MiBLSi offered six DIT trainer workdays for MTSS coordinators. These sessions were available to attend in person or online, and were recorded and posted to the MiBLSi website for later viewing. In the trainer workdays, the MiBLSi Core Team supported the MTSS coordinators' planning and preparation for upcoming DIT meetings by providing the content of the meeting, as well as modeling activities to be completed. Additionally, they highlighted potential challenges with the content and offered ideas for pre-correction and troubleshooting.

**MTSS Coordinator Network meetings.** The MTSS Coordinator Network meetings are a series of statewide professional development sessions for all MTSS coordinators. In 2013-14, most of these monthly meetings were two-hour online presentations, conducted via Adobe Connect. Three meetings – in November, March, and June – were full-day, in-person workshops. These meetings, presented by the Technical Assistance Unit, were designed to address common questions, barriers, and problems of practice across MTSS coordinators. Their purpose is to allow MTSS coordinators from throughout the state to connect with each other, building a community of practice through the sharing of issues and ideas, and to connect directly with the MiBLSi staff.

**Statewide conferences.** Each year, MiBLSi hosts two statewide conferences: the Coaching Conference in the fall and the Implementers' Conference in the spring. These two-day conferences, presented by MiBLSi staff, are open to MiBLSi's ISD and district partners, including MTSS coordinators, along with other educators for whom the content is relevant (e.g. district MTSS coaches or administrators of potential district partners). The keynote speakers and breakout sessions for each conference are organized around a topical theme; the theme for the November 2013 Coaching Conference was *Coaching Using the Implementation Drivers – 'Drivers Ed'* and the theme for the March 2014 Implementers' Conference was *Exploration and Adoption Using the Hexagon Tool*. PowerPoint slides and other handouts for all conferences are archived and posted on the MiBLSi website.

**Coaching Conference.** The November 2013 Coaching Conference focused on using the Implementation Drivers, a set of mechanisms developed by the National Implementation Research Network (NIRN) that facilitate the implementation process. The three implementation drivers that MiBLSi includes in its adaptation of this model are competency, organization, and leadership. Within each of these components are several specific practices (See Figure 4.4: Implementation Drivers). The MiBLSi model draws on this framework to guide implementation support. Dr. Karen Blase, one of the creators of the Implementation Drivers, was the keynote speaker at the 2013 Coaching Conference; she spoke to how using the Implementation Driver framework improves the fidelity, durability, and scale-up of an initiative.

At this conference, all attendees participated in all three of the breakout sessions, each of which centered on applying the Implementation Drivers at a different level of implementation: District Level, Building Level, and Grade Level. Attendees were encouraged to stay with other members of their ISD or district teams throughout the

conference, to enable conversation surrounding the application of presented material to their specific contexts.

**Figure 4.4: Implementation Drivers<sup>10</sup>**



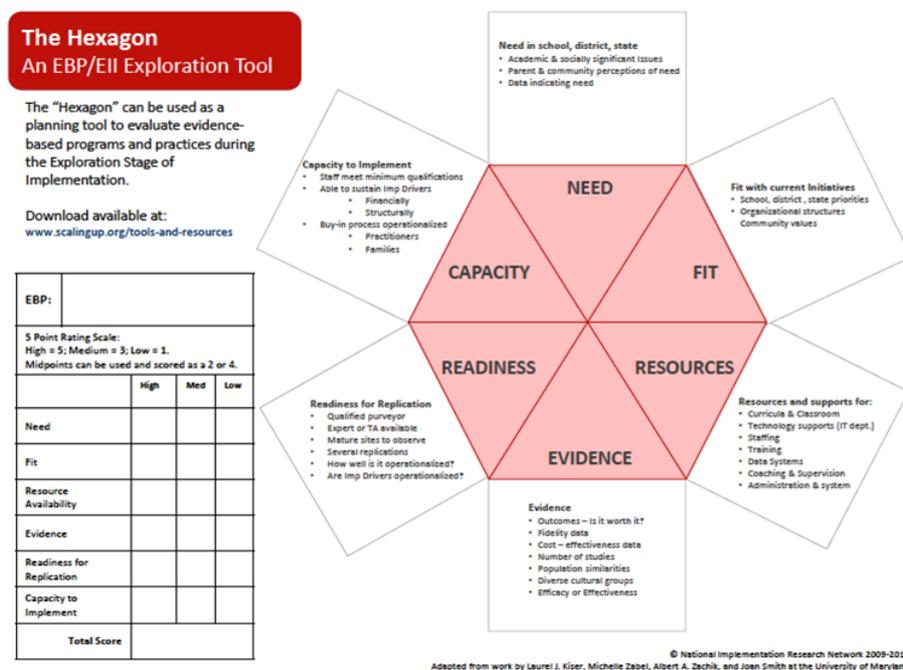
**Implementers’ Conference.** The March 2014 Implementers’ Conference theme, *Exploration and Adoption Using the Hexagon Tool*, was again centered on a NIRN-developed framework. The Hexagon Tool is a planning device, used to determine the readiness level of an organization for implementing evidence-based initiatives. It is employed in the early stages of implementation – Exploration and Adoption – during which the organization is preparing itself to begin the installation of a new initiative such as MTSS (See Figure 4.5: Hexagon Tool).

As with the Coaching Conference, a keynote speaker addressed the whole group, then attendees broke off into smaller, targeted sessions. The objectives for this conference were to have participants gain a deeper understanding of the Hexagon Tool and its application, and for them to learn to use research evidence to identify specific programs or curricula for use in

<sup>10</sup> (Capacity Assessment, 2014). Adapted from Fixsen & Blase, 2008.

their local contexts. The keynote speaker for this conference was Dr. Ben Clarke of the Center for Teaching and Learning, who talked about the research behind evidence-based instructional practices. Following his address, each participant chose one all-day breakout session to attend, based on the content most relevant to their MTSS implementation work. The options included sessions on elementary literacy, adolescent literacy, math, behavior, and universal screening.

**Figure 4.5: Hexagon Tool<sup>11</sup>**



**Regional Focus Planning Sessions.** Regional Focus Planning Sessions (RFPS) are regional professional development sessions provided by MiBLSi for ISD implementation teams. Typically, several implementation teams attend a RFPS facilitated by the region’s TAP, sometimes accompanied by another MiBLSi staff member. In these sessions, teams are guided through the process of planning and leading district implementation; they develop plans, problem-solve around developing systems, and use data to guide prioritization and

<sup>11</sup> (Blase, Kiser, & Van Dyke, 2013)

decision making, with MiBLSi guidance and the opportunity to interact and collaborate with other teams available.

**Online modules.** In 2013, MiBLSi's Professional Learning Unit began to introduce online modules for self-guided learning about MTSS structures and practices, the implementation process, and reading and behavior systems specific to this project. They are designed for use by MTSS coordinators or their implementation partners as guides for independent study. Alternately, they can be effectively presented to a group, and many have discussion opportunities built into their content.

MiBLSi has now published more than 30 online modules, which are free and accessible through Michigan Learnport, a virtual learning site specializing in professional development for educators. MTSS coordinators and MiBLSi staff have been provided with a handbook that outlines each module, specifying its purpose, target audience, intended outcomes, agenda, and associated readings and resources. As this mode of support is quite new, data are not yet available as to how, and how often, MTSS coordinators are making use of the modules.

### **Voiced Representations: Guidance**

**Privileged modes of guidance.** MiBLSi offers a multitude of opportunities for MTSS coordinator support and guidance, as evidenced in the documented representations of practice shared above. In their interviews, Core Team members and TAPs shared their perspectives on the system of support. These commentaries revealed two strongly privileged modes of guidance: TAP support and MTSS Coordinator Network meetings.

**Technical Assistance Partners.** Throughout their voiced representations of practice, the Core Team members described the Technical Assistance Partners as the front line in supporting MTSS coordinators. The TAP is so important to MTSS Coordination, said one Core Team member, "The support of our ISD MTSS coordinators is falling right now to our

Technical Assistance Providers [sic],” and the success of the MTSS coordinators is contingent on the TAP’s effectiveness.

As human resources, TAPs provide in-the-moment and ongoing context-sensitive guidance as well as access to material resources. They have expertise in training, in MTSS systems and practices, and in implementation science. Their close and continual contact with MTSS coordinators gives them a unique perspective on the role and an ability to assess both their day-to-day and long-term needs. With a nod to the ambiguity and complexity of the MTSS coordinator role, one Core Team member referred to the TAP as an indispensable “point person to connect with from the grant...nobody else really understands the MTSS coordinator job.”

The TAP – MTSS coordinator relationship, while hierarchical, is mutually supportive. All of the TAPs and the MTSS coordinators with whom I interacted characterized their working relationships as close and collaborative, with ongoing and open communication. One of them described the relationship with MTSS coordinators as a partnership, balanced between coaching and collaboration:

Coaching definitely in that this is brand new work for them and I have the project level perspective and the big picture idea, but we’ve done a lot of collaboration this year as well. I feel like I need their input every bit as much as they need mine, with this district level work, because they know their districts and they know their ISDs. I can bring MiBLSi’s perspective.

As the MTSS coordinators deepen their knowledge and improve their practice, they strengthen the support that the TAP is able to provide.

*Building MTSS Coordinator capacity.* One of the essential responsibilities of the TAP, as cited by both TAPs and Core Team members, is the transfer of skills and knowledge to ISDs and districts, through the MTSS coordinators, in the service of developing local capacity. Several of the voiced representations of the TAP role described the objective of scaffolding the TAP support of MTSS coordinators, with the intent of gradually removing

this direct support as they develop their capability to perform their role independently. As one of the Core Team members articulated,

Our goal would be in the second year that a good percentage of [MTSS coordinators] are feeling like ... ‘OK, I want to talk with my TAP, I want consultation, I want to be able to problem-solve, I want to be able to debrief, but I can actually go and do this on my own most of the time.

Successful TAPs, in this depiction, render themselves obsolete.

*District Implementation Team Content support.* An ongoing function of the TAP is to support the MTSS coordinator in preparing for DIT training sessions. This guidance varies from brief phone or email consultations to extended, in-person planning meetings. One TAP, for example, sits down with the MTSS coordinator and a co-trainer (an ISD school psychologist) before each District Implementation Team meeting to set the objectives and agenda, to address contextual concerns with the content or process, and to finalize the logistics for the meeting. The TAP gives the other two most of the floor, and chimes in to connect the conversation to big ideas of MTSS and implementation science.

I observed another MTSS coordinator talking with a TAP about the District Implementation Team’s desire to stray from MiBLSi’s suggested timeline with the data review process, to which the TAP replied,

The big idea is that people are taking relevant valid data and making instructional decisions on it. If it’s too cumbersome and you have to go rogue, keep an eye on what they need to do for the benefit of instruction and kids.

This TAP trusts the MTSS coordinator and their co-trainer to make the decision with the team, but uses an understanding of the big ideas of MTSS to help them ground that decision.

Said the MTSS coordinator, “I like the details but I also like to see the big picture of ... where are we going. So [the TAP] will help with big picture questions.”

*Problem-solving.* As TAPs are regionally based project staff, they add value to MTSS Coordination by bringing the MiBLSi lens to local problem-solving. One TAP, for instance, described the relationship with MTSS coordinators as being built around creating a shared

understanding of the big ideas of MTSS, then getting into the details of training content and how it fits into the district context and how it may need to be adapted. This resonates with another TAP's depiction of this role as interpreting the big picture of MTSS and helping MTSS coordinators to "contextualize it based on these different districts that all look so similar on paper, but are all so incredibly different in practice." One TAP explained,

My support to them is to support their plan to go back and communicate [with the liaisons] prior to coming together as a full team, so that these individuals have a heads up, they can do some pre-work and planning, they can plant seeds, whatever needs to happen prior to getting together with the big group....If I do anything it's to help them just trying to keep their eye on the ball.

To this end, the TAP minimizes direct contact with district personnel, allowing the MTSS coordinator to take the lead on MiBLSi-related communication. This TAP is worried, however, that the MTSS coordinators struggle to bring local personnel into the work of implementation, and end up taking on the bulk of the foundational work themselves. This challenge raises the fear among Core Team members that, in the effort to take on the bulk of the workload rather than delegate responsibilities, MTSS coordinators will experience burnout and leave the project.

*Differentiation of supports.* Because they bring diverse prior experiences, rather than a common background, MTSS coordinators' needs for support vary greatly. The TAPs are challenged to tailor their support to accommodate each MTSS coordinator's experience, knowledge, skills, personality, and ISD context. According to one TAP, "every MTSS coordinator, every ISD, every district brings such different things to the table and you tailor your support to whatever the needs are of that person." For example, this TAP talked about differentiating support for each MTSS coordinator, explaining that one MTSS coordinator is very independent, so the TAP role is to be on-call to answer questions, assist in problem-solving, and co-facilitate trainings when needed; another, less confident MTSS coordinator needs a consultation ahead of each District Implementation Team session to prepare, model,

and problem-solve, then the TAP leads much of the training and discussion during the meeting.

***MTSS Coordinator Network Meetings.*** Networking among MTSS coordinators is critical because the work is so difficult and so unusual, according to the Core Team member who works the most closely with the TAPs and MTSS coordinators. As this member mentioned when describing the TAP relationship, very few people, even within MiBLSi, truly understand what MTSS coordinators do; therefore, it's important for them to develop a group identity and build relationships with each other for empathetic professional support.

If we didn't have the few times a year for these people in this crucial role to get together, to sit down next to someone else who also calls themselves [sic] a MTSS coordinator, I think that would be hard.

Another Core Team member reinforced the importance of these meetings, noting that "based on the feedback loops, I know MTSS coordinators greatly appreciate the online webinar Adobe Connect calls, they appreciate the face to face time, they find those to be extremely valuable to their role."

MTSS coordinator Network meetings follow two formats: day-long face-to-face meetings and two-hour online webinars through Adobe Connect. According to the Core Team members, these two venues each carry benefits and drawbacks. They expressed that while the Adobe Connect calls are conducive to sharing information and allow for universal participation, interaction and networking among participants is challenging in a virtual situation. The face-to-face meetings encourage communication and connections among the MTSS coordinators, but they pose considerable logistical challenges. One Core Team member offered the following explanation of the struggle with the dilemma posed by the limitations of each type of meeting:

Face-to-face opportunities are tough because people have to travel to get there, but when I think about conference calls for two hours, if it's to orient someone about...upcoming training topics, we have trainer support online modules that can meet that need.

This statement alludes to the fact that, for some purposes, there are modes of support available that could be more efficient or effective than these meetings.

Another challenge presented in both types of MTSS Coordinator Network meetings is the increasing need for differentiated support. Existing MTSS coordinators become more proficient in their practice across time and brand new coordinators come into the project each year; as this happens, the experience gap among them widens. The Core Team member who leads these meetings said that, “the MTSS coordinator Adobe calls are getting more and more difficult because people are in such different places.” Finding a common ground on which to base support to this increasingly diverse group of coordinators is becoming unrealistic.

The privileging of MTSS Coordinator Network meetings comes with a caveat: not all of the commentary about these meetings was optimistic in nature. All of the Core Team members agreed that creating a community of practice among MTSS coordinators is important, but they all also noted shortcomings in the designs of both the face-to-face and the virtual meetings and, in some instances, suggested that there may be better ways to address this need.

**Subordinate modes of guidance.** Two of the modes that MiBLSi offers MTSS coordinators for guidance were privileged by the Core Team: TAP support and MTSS coordinator Network Meetings. The remaining types of support were subordinate in the interviews, each mentioned fewer than ten times across all interviews: DIT content, trainer workdays, statewide conferences, and online modules. These types of guidance might initially be classified as tacit, as they were essentially absent from the voiced representations, but on closer analysis, DIT content, trainer workdays, statewide conferences, RFPS, and online modules are embedded within the privileged modes of support.

The DIT content, trainer workdays, and RFPS are embedded within the voiced representations of TAP support. The MTSS coordinator receives the training content directly from MiBLSi, but according to the Core Team and the TAPs, it is the TAP who helps them to interpret and prepare it to share with the DIT. The trainer workday and RFPS also provide venues for bringing the local context into the content. Supplementing the guidance of the TAPs, the trainer workdays offer walkthroughs of upcoming training sessions, with ideas for customizing and troubleshooting the content and connecting it to the big ideas of MTSS. The trainer workdays allow the MTSS coordinators to work independently before bringing their ideas to the TAPs, thereby building their autonomy in the role.

Statewide conferences and online modules were also relatively tacit in the interviews, and they were most often discussed in conjunction with the MTSS Coordinator Network Meetings. Two of the four specific mentions of the statewide conferences involved introducing the idea of eliminating the coaching conference in favor of a multi-day MTSS coordinator conference. This idea would be taking the MTSS Coordinator Network meetings to a deeper level. One Core Team member spoke to the benefit of having the MTSS coordinators engage in more intimate conversations with implementation experts, for example, rather than listening passively to them in a keynote address.

Online modules are offered as alternatives to the Adobe Connect meetings for sharing information and knowledge. The Core Team member who spearheaded the design of the modules expressed a very basic purpose behind them: “I’m hopeful that the online modules are going to help around building background knowledge and understanding.” They allow for self-paced, individualized learning, which was one of the stated challenges with the online meetings. As I mentioned in the documented representations of practice, the online modules are a new and untested mechanism, which may explain their absence from the

interviews. A more meaningful analysis of their role in MTSS coordinator support could occur in a future study, once they've been in place for a few years.

### **Discussion: Guidance**

While some types of support are more frequently offered to or accessed by the MTSS coordinators, none of these modes came forth from this analysis as being more relevant or effective than others in the documented representation. Rather, they are presented as an ensemble of complementary learning opportunities. However, in the voiced representations, the highest priority was given to the TAP and to the MTSS Coordinator Network Meetings. The other modes of guidance were embedded within these two support mechanisms.

Given the broad array of modes of guidance, MTSS coordinators are able to customize their support to suit their own needs. While some may prefer to participate in group learning opportunities, such as the MTSS Coordinator Network meetings and the statewide conferences, others may be more at ease with the individual learning that the trainer workdays and online modules offer. As all of the guidance is optional, those MTSS coordinators who have extensive experience in this work may choose to opt out of most of the guidance; those who are new to MTSS implementation can elect to draw upon all of them.

### **Discussion**

As shown in this chapter, the role of the MTSS coordinator is highly complex as designed. The scope of the Practice Profile and the varied and elaborate role descriptions among MiBLSi staff serve as evidence that MTSS coordination is multifaceted and open to interpretation. Complicating matters is the fact that the performative role of the MTSS coordinator is continuously evolving. Over time, districts move forward through the stages of implementation, and as they develop increasing internal capacity to enact and sustain MTSS, the MTSS coordinators are compelled to adjust to their emerging needs for support.

Furthermore, as the MiBLSi model evolves in response to feedback, experience, and emerging research, the responsibilities of the MTSS coordinator will shift. That having been said, in this chapter I examined the role definitions as they were specified at the time of data collection. This description represents but a snapshot; the ostensive design for MTSS coordinator practice is a work in progress, and this narrative may well find itself obsolete before it is completed.

### **Analytic Framework**

To complete this analysis, I developed a framework inspired by the ostensive and performative aspects of organizational routines introduced by Feldman and Pentland (Feldman & Pentland, Reconceptualizing organizational routines as a source of flexibility and change, 2003). The questions upon which this chapter is based lie within the ostensive realm: the design for practice. The ostensive aspect of routines, according to Feldman and Pentland (2003), can include both formal blueprints for practice – what I call the documented representations - and accepted standards of practice – what I call the voiced representations. In this study, this framework sets up the capacity to make comparisons between the MTSS coordinator functions, competencies, and guidance as they were designed and as they are interpreted by leaders within MiBLSi.

I have enhanced this framework to further nuance these comparisons. Within the documented and voiced representations, certain functions, competencies, and guidance are emphasized over others. By extending the analytic framework to include privileging and subordination, I am able to make a more detailed comparison between the design and interpretation of MTSS Coordination, which in turn exposes the true priorities of the organization for this role. Further nuancing the analysis, this framework comprises yet another level of detail, specifying the nature of subordination as tacit, suppressed, or embedded.

The development of this framework is a notable outcome of this study. While I designed it to address these particular research questions using this set of data, it is generic enough to apply to other studies that seek a detailed comparison between the voiced and documented representations of a practice, program, or system.

This analytic framework is not without limitations, however. Even with its clearly defined subcategories, not all data fit neatly into each one. Some murkiness is inevitable, which requires the user to make informed and intentional decisions. For example, I found that my objective observations of the modes of guidance do not precisely match the guidelines for documented or voiced representations. After some contemplation, I resolved that these data, as they do not involve interpretation, belong in the documented representation category. This framework is but a tool designed to facilitate data analysis; discovery comes through the expertise and judgment of the researcher who uses it.

### **Functions**

The designed function of MTSS coordination is to develop local implementation capacity while maintaining fidelity to the MTSS model and implementation science. To summarize the Practice Profile, which offers a more detailed blueprint for the role, MTSS Coordination includes organizing and coordinating the local implementation process in the interest of building capacity within school districts to coach and train MTSS strategies and to base programmatic and instructional decisions on district-wide data. To facilitate this process, MTSS coordinators are expected to deepen their own knowledge of MTSS and implementation science and communicate effectively with stakeholders. Within the Practice Profile, there is no evidence of certain functions being privileged over others.

The voiced representations of practice, per MiBLSi's Core Team, privilege two broad functions for MTSS coordinators: coordination and management of the local implementation team and communication and relationship building. These functions align with the

documented representation in the following Critical Components: organize, coordinate, and co-facilitate the work of the ISD and District Implementation Teams and effective communication. In sum, per the documented and voiced representations of practice included in this study, MTSS coordinators are expected to be most successful if they focus their energy on enabling the work of the local implementers through good communication and relationship building with stakeholders.

### **Competencies**

The successful fulfillment of the MTSS coordinator functions requires a great number of specific competencies. In this study, I used the documented and voiced representations of practice to uncover the knowledge and skills that were deemed most vital to the role. Those that emerged as most highly privileged across both types of representation are communication skills, interpersonal skills, and knowledge of MTSS and implementation science.

These privileged competencies fall into similar realms as the prioritized role functions described above. The privileging of communication and interpersonal skills reinforce the importance of professional interactions and relationship building in facilitating the work of the local implementation teams. The Core Team has expressed its belief that fluency with MTSS practices and implementation science enhances the MTSS coordinator's ability to respond to local needs in guiding the implementation process. Carrying a deep understanding of the content allows the MTSS coordinator to focus on problem-solving, rather than on knowledge building, while moving the work forward.

### **Guidance**

While the role expectations for the MTSS coordinator sometimes seem unwieldy, the support mechanisms provided by MiBLSi are plentiful. The comprehensive array of technical assistance and professional development opportunities is designed to scaffold the

learning of the MTSS coordinators, developing in them the capacity to perform their roles independently. The documented representations of guidance consist of objective descriptions of the various modes of guidance and do not privilege one form over the other.

The voiced representations, however, clearly privilege two modes of guidance: TAPs and MTSS Coordinator Network meetings. Each MTSS coordinator is assigned a regional TAP who is available to co-plan and co-present District Implementation Meetings, to troubleshoot barriers to implementation, to facilitate challenging conversations, and to lend an empathetic ear, among other functions. The TAP is likely the go-to mode of guidance because, as a human resource, they are easily and continually accessible and can readily adapt their support to meet each MTSS coordinator's individual needs. The MTSS Coordinator Network meetings, while less personalized than the TAP support, provide another human resource for the MTSS coordinators. These opportunities establish a professional community among MTSS coordinators and allow them to regularly seek specified guidance in problem-solving from their contemporaries as well as from MiBLSi staff.

**Challenges.** There are a few potential challenges to MiBLSi's design for MTSS coordinator support. First, since there are so many modes of support, there is a risk that they may lack cohesion, creating confusion rather than clarity for participants. To avoid this issue, it is in MiBLSi's interest to be careful and intentional about aligning these experiences.

Additionally, as the MTSS coordinators enter this position with a variety of capabilities and experiences, and because they are working in an array of ISD and district contexts, it is important to differentiate support in ways that will ensure their value to all participants. As the project expands, the variables among MTSS coordinators will inevitably increase, such as the level of experience of the coordinators and the stage of implementation in the districts with which they work. Over time, generalizing support content across cohorts

will likely become impractical and the need to differentiate will become greater. MiBLSi will be confronted with maintaining a system of supports that is at once highly efficient and deeply meaningful to all participants.

Finally, the onus is currently on the MTSS coordinator to take advantage of the support and guidance that MiBLSi makes available. This requires recognizing one's own needs and knowing which resources specifically address them. Perhaps the greatest caveat to the support system is, ironically, that because MTSS coordination is so complex and time-consuming, MTSS coordinators aren't always able to prioritize finding and utilizing resources that, in the end, would likely assuage their work load.

### **Conclusion**

In this chapter I have described the vision for MTSS Coordination from MiBLSi's perspective. Using a framework that facilitates the parallel analysis of the formal, documented representations of this vision alongside the voiced representations of the project's Core Team and Technical Assistance Partners, I have made comparisons and connections within and between the functions, competencies, and guidance for the role.

Through this analysis, I have found that, while the role expectations are vast, the privileging of some dimensions reveals the areas in which coordinators are really expected to focus their attention. Through the eyes of the program designers and the Core Team, the functions at the heart of MTSS coordination are organizing and managing local implementation, communication, and relationship-building. Knowledge of MTSS and implementation science, communication skills, and interpersonal skills are the most valued competencies in carrying out these functions. The most essential modes of guidance for implementing these functions and developing these competencies are the interactive human resources: the Technical Assistance Partner and the MTSS Coordinator Network.

The MiBLSi Core Team members recognize the grandeur of the MTSS coordinator role and acknowledge that fully enacting it as designed is not a realistic expectation for an individual. As one Core Team member readily admits, the expectations for MTSS coordinators are “pie in the sky, [and] the reality is, there aren’t a lot of people out there who can do all of that.” Nonetheless, there is currently pressure on the MTSS coordinators to be, in the words of a Core Team member, “the superman that does everything.” MiBLSi’s leaders appreciate that this role centers on being a “super coach” who can wear the hats of a resource, a motivator, and a trainer, among others.

In the upcoming chapter, I will enhance this analysis by giving voice to the MTSS coordinators. Through them, I will address how this role is lived; that is, how they interpret and enact the functions, competencies, and guidance that have been specified for them.

## CHAPTER V

### FINDINGS: INTERPRETATION AND ENACTMENT OF PRACTICE

*How do role incumbents interpret and enact these functions, competencies, and guidance?*

*What variation exists, if any, between the role incumbents' interpretations and enactments and the design for practice?*

#### Introduction

As I showed in Chapter IV, MiBLSi has specified, both formally and informally, an extensive set of functions and competencies for the MTSS coordinator role, accompanied by a comprehensive system of guidance to support their enactment. Through the analysis of the documented and voiced representations of the role as designed, I uncovered the most highly privileged functions, competencies, and modes of guidance from the perspective of the project's architects. What lies ahead, then, is to identify the priorities of those who live this role: the MTSS coordinators.

The questions upon which this chapter is based lie within the performative domain of the MTSS coordinator role. According to Feldman and Pentland (2003), the performative aspect of a routine “consists of specific actions, by specific people, in specific places and times” (p.101). They further specify that it “creates, maintains, and modifies the ostensive aspect of the routine” (p.107), and explain that “the relationship between the ostensive and performative aspects of routines creates an on-going opportunity for variation, selection, and retention of new practices and patterns of action” (p.100).

In an observational study of managerial work, Mintzberg (1975) found that, although the classical definition of management is to “plan, organize, coordinate, and control the work

of others, the job is, in reality, deeper and more complex than that” (p.1). He queries that without knowing what managers really do, “how can we improve the practice of management at all?” (Mintzberg, 1975, p. 1). In this chapter, I will present my findings about the MTSS coordinator role as it is interpreted and carried out by its incumbents, with the aim of informing the ostensive design and the supports for the role and ultimately strengthening the practice of MTSS Coordination.

### **Analytic Framework**

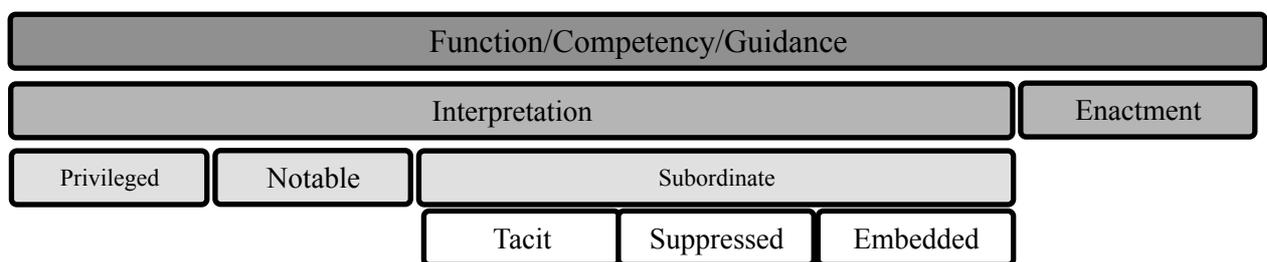
To investigate the questions of how MTSS coordinators interpret and enact their role – that is, how the MTSS coordinators envision their own role and what they actually do - I have focused this analysis on two types of evidence: interviews and field observations of each of the three MTSS coordinators in my subsample. These sources will allow me to link how the MTSS coordinators enact their work with their perceptions of what that work should be. I will then be able to connect and compare these findings with the documented and voiced representations of the design for practice.

Conformities across sources provide evidence that the privileged functions, competencies, and modes of guidance are indeed the most important components in carrying out this role. They also suggest that effective and consistent guidance for performing the designed practices for this role has been implemented. Discrepancies among these data may indicate that the project’s architects misjudged priorities when designing the role, that the MTSS coordinators are ineffectively assessing their own practice, or that the MTSS coordinators are not interpreting the role as it is meant to be. Further analysis would be warranted to explore the possible sources of any inconsistencies I find.

To complete the current analysis, I made a functional modification to the framework that I created for the previous chapter: I added a *notable* designation to the privileged/subordinate dichotomy. Unlike in the analysis of the documented and voiced representations of the

design for practice presented in Chapter IV, where the delineations between the privileged and subordinate functions were clear-cut, the prioritizing of functions, competencies, and guidance in the interpretations and enactments of the MTSS coordinators fall onto more of a continuum. Some components of the role are unambiguously privileged and subordinate; those that lie between are designated as notable (See Figure 5.1: Analytic Framework: Interpretation and Enactment of Practice).

**Figure 5.1: Analytic Framework: Interpretation and Enactment of Practice**



There is an important caveat to the findings presented in this chapter. Because of the opportunistic nature of the observational data, I cannot state with confidence that they accurately represent the complete picture of the MTSS coordinators' enactment of their role. As I did not shadow each of the MTSS coordinators through the entirety of the data collection period, but rather selected a set of events to observe, it is possible that I missed the enactment of certain aspects of their work, or I might have witnessed the elements of their practice in false proportions, due simply to the accident of timing. In addition, due to scheduling issues and meeting cancellations, I was not able to observe all of the MTSS coordinators equally enacting their role; for instance, I observed three DIT meetings each with two of the coordinators, but only two with the third. Thus, the enactment data cannot be considered complete and should not be used to interpret the privileging or subordination of the components of practice. I therefore present them in conjunction with the interpretation data, where they serve to illustrate, reinforce, and/or bring into question the findings therein.

## **Functions**

The comparison between the documented and voiced representations of the role functions and the interpretation and enactment of these functions by the MTSS coordinators themselves demonstrate whether the role as designed aligns with the realities of the role in action. If the ostensive and performative aspects of the role do not align, the question of causality comes into play: does the design for practice neglect the realities of the work, or does the guidance fail to effectively communicate the intended design to the practitioners? The findings related to those questions can form the basis for feedback to improve the role definition and bring the role as designed and the role as carried out closer to one another.

To establish how the MTSS coordinators interpret their role, I began by analyzing interview responses of the three MTSS coordinators in the study, describing their professional responsibilities and their priorities for MTSS coordination. I continued with an analysis of my field observations of their work, using enactments as evidence to reinforce or confront the MTSS coordinators' interpretations.

### **MTSS Coordinator Interpretation & Enactment: Functions**

In their interviews, two functions stood out as most critical to the MTSS coordinators' practice: organize, coordinate, and co-facilitate the work of the ISD and District Implementation Teams and communication and relationship-building. These functions were privileged both in frequency – the MTSS coordinators mentioned them considerably more often than other functions – and in weight – they were described with more importance and emphasis than the other functions. These were also the two functions that I observed the MTSS coordinators enacting most frequently in the field.

An additional function was repeatedly mentioned by MTSS coordinators as critical to their practice, but was not quite as highly prioritized as the privileged functions: guide problem-solving with data based decision making. Since the MTSS coordinators emphasized

this function, but not to the same degree as organize, coordinate, and co-facilitate or communication and relationship-building, I have categorized it as a notable function; the observational data reinforce this finding.

The remaining functions of MTSS Coordination, including develop and support local training and coaching capacity, deepen personal knowledge of MTSS and implementation science, and develop a plan for continuous learning, were subordinated in the MTSS coordinators' interpretations of their role. My observations of practice reinforce the subordination of three of these functions: develop and support local coaching capacity, deepen personal knowledge of MTSS and implementation science, and develop a plan for continuous learning. However, I did see evidence of MTSS coordinators developing and supporting local training capacity with notable frequency.

**Privileged functions. *Organize, coordinate, and co-facilitate the work of the ISD and District Implementation Teams.*** The MTSS coordinators place the highest priority for their practice on organizing, coordinating, and co-facilitating the work of the ISD and District Implementation Teams. Collectively, they described this piece as the keystone of their work, without which the other components would be ineffective and insufficient. This interpretation is reinforced by the fact that I witnessed MTSS coordinators engaging in this function more than twice as often as in any other function. One MTSS coordinator represented the sentiment of the group in stating that while there are a couple of crucial components to the role,

The whole organization and coordination of everything that's involved with the whole process with MiBLSi and everything related to the ISD team and the district team, in order to make it all move...the organization and coordination piece, I think that's the most important.

When I asked the MTSS coordinators to rate each of the Critical Components of the Practice Profile on a scale of one ("not at all important") to four ("critically important"), they all gave *organize, coordinate, and co-facilitate the work of the ISD and District Implementation*

*Team* four points, and all three of them selected it as one of the two most important Critical Components on which to elaborate during the second interview.

One MTSS coordinator conveyed that the main responsibility in this role is coordinating several groups at the same time. In fact, this coordinator described supporting the local implementation team as all-encompassing:

Probably the number one [most important Critical Component] I would pick is the organize, coordinate, and co-facilitate the work of the ISD and District Implementation Team... Without that district team, without that superintendent, without that collaborative relationship between our ISD and the district, I don't see any of these other components being a possibility, in terms of implementing them well or sustaining these practices.

Another MTSS coordinator also expressed that this Critical Component, together with effective communication, comprise the two most important functions to successful MTSS coordination.

All of the MTSS coordinators in this study expressed difficulty in separating the organize, coordinate, and co-facilitate function from others, describing it as interwoven into all of their work. One MTSS coordinator, for example, explicitly and emphatically identified it as present all of the time:

I think you could almost argue that 100% of our time is spent in that component. If I'm not working directly with [the implementation team], I'm preparing to work with them. If I'm not preparing, I'm working with MiBLSi to help prepare with them. I would say almost all of our time is spent organizing, coordinating, and co-facilitating. It doesn't mean we're not working on these other tasks simultaneously... But the goal of engaging in that work is to support that district team, so I would say 100% of our time is really devoted to supporting the district and ISD teams.

Attempting to parse it out from their other MTSS tasks, another MTSS coordinator said that roughly 75% of their MTSS coordinator time is devoted to this Critical Component, but that "it's short amounts of time, spaced out." The third MTSS coordinator was unable to pin down a percentage of time spent on this function of MTSS coordination, finding it challenging to segregate it from other tasks, and, specifically, from MTSS work with districts that are not partnered with MiBLSi.

*Facilitating the DIT work.* One participant, when outlining the primary responsibilities of a MTSS coordinator, first talked about facilitating the work of the ISD implementation team: making sure they have access to information, monitoring their progress on action plans, and ensuring that they have the capacity (people, knowledge, and time) to support the local districts. As the MTSS coordinator said, it's "not only having the process laid out for [the local implementation team] but also having somebody there to facilitate it for them." Another MTSS coordinator summed up the role in relation to the District Implementation Teams by saying, "I'm the coordinator, but they're out there doing the work in the buildings." In this statement, a distinction is drawn between facilitating the work of the DIT and the action taken by the team members. To illustrate, every DIT meeting I observed, across all of the MTSS coordinators, included check-ins on work completed by the DIT members since the previous session. The MTSS coordinators use this information to complete MiBLSi's checklist for implementation, then use the checklist to suggest tasks to accomplish before the next session, but they do not take on the tasks themselves.

*Contextualizing content.* MTSS coordinators use their knowledge of the local context, their relationship with the DIT, and their personal presentation style to customize the MiBLSi-designed meeting content. I observed one MTSS coordinator providing the DIT with questions to spark their discussion and decision making process. For example, the coordinator presented the DIT with the following task: "Considering the district focus area, use the continuum to determine where the building staff is in terms of stages of implementation. How do you know? Complete the multi-year planner based on your schools' phases of implementation." Another MTSS coordinator incorporated the same topic in a less formal share-out, asking DIT members to verbally describe the schools' current stages of MTSS installation and why they were there, sparking a group conversation around completing the multi-year planner.

*Technical Assistance Groups and MTSS Focus Days.* One way in which a MTSS coordinator has enacted the organize, coordinate, and co-facilitate function is through ISD-based Technical Assistance Groups (TAGs). The MTSS coordinator has set up five groups to correspond with the five components of the ISD's MTSS Implementation plan. These groups are made up of individuals in a variety of roles, such as administrators, school psychologists, and special educators, from across the ISD. Under the assumption that they have met and completed tasks separately in the interim, the TAG teams come together for a half day once per month.

During the TAG meeting that I observed, the MTSS coordinator communicated relevant information from MiBLSi and the ISD then co-facilitated a discussion of updates, celebrations, questions, and concerns. The coordinator assigned products for each of the teams to create, and then set them to work on their own.

These TAG meetings take part during the ISD's monthly MTSS Focus Days. The idea behind these days is to prioritize MTSS-related issues across the ISD. In addition to the TAG sessions, the MTSS coordinator utilizes this day to meet with the ISD stakeholders, including the Liaison, Special Education Coordinator, and other administrators, with the intent of maintaining their awareness and support for MTSS Implementation within the ISD and eliciting and informing related decisions when necessary. In some months, the MTSS Focus Day also incorporates group participation in the MTSS Coordinator Network Adobe Connect session.

*Challenges.* A noteworthy difficulty the MTSS coordinators shared about the organize, coordinate, and co-facilitate function include managing time, managing the team's work, and setting up systems. One MTSS coordinator cited early struggles with facilitating meetings, which required putting in extra, focused time and effort at the beginning of the year to establish norms for collaboration. The coordinator blamed these issues in part on the

team's inexperience with collective work, noting that "it's certainly new for us to begin stepping out of our silos at the RESA and working together as a group." Managing the collaborative efforts of a new team, the coordinator explained, required sustained and determined effort.

Another hurdle in managing the work of the local teams is synchronizing the schedules of all of the stakeholders. More often than not, specified one MTSS coordinator, the schedule drives the priorities of the work. The timing of upcoming meetings and trainings dictates which tasks are most critical to the implementation process. Scheduling of upcoming training sessions and meetings was a topic at every DIT meeting I observed. In some cases, the MTSS coordinator was attempting to assist the team in scheduling events a year in the future.

One MTSS coordinator stated that what is most "challenging is taking what you know is important for implementing MTSS in terms of research and best practice and making all those things fit into people's everyday lives in the school system." Differentiating the components of the training, the content, and the implementation process to fit the local context is a serious undertaking for MTSS coordinators.

***Effective communication.*** The second most critical function of MTSS coordination, according to the coordinators, encompasses communication and relationship-building with all parties involved in local implementation. The MTSS coordinators described communication as a means to share information both internally with the implementation teams and externally with the boards and administrations. Expressed one MTSS coordinator, "There is so much communication that happens in this role...it's like the biggest part of my job is communicating with people." Data I gathered through observations of MTSS coordinators in action reinforce the finding that communication is an essential function to this role.

Per the MTSS coordinators, effective communication requires intentionality around keeping everyone informed about the implementation team's work and developing and using feedback loops. This function is of such perceived consequence that one MTSS coordinator engaged an external consultant to assist the ISD implementation team in building collaborative relationships and communicating productively. Another MTSS coordinator recruited a couple of school psychologists who work in multiple buildings to be on the ISD implementation team, "to really help spread the word through the districts" about MTSS.

Seeing the establishment of strong collaborative relationships as integrated with other functions of the role, one MTSS coordinator said that "without that district team, without that superintendent, without that collaborative relationship between our ISD and the district, I don't see any of these other components being a possibility, in terms of implementing them well or sustaining these practices." The MTSS coordinators said that they leverage these relationships to establish buy-in and enthusiasm for MTSS work and to collaboratively solve problems and overcome barriers to implementation.

I had the opportunity to observe several instances of the MTSS coordinators in communication with administrators. In one district, building principals and the district superintendent partake in the DIT meetings, so the communication is ongoing. In the other two districts, the MTSS coordinators took the time to debrief administrators about what was happening at the DIT meetings and asking for advice on communicating progress to higher-level stakeholders. Another also provided the administrator with a print copy of the product on which the team had been working. In one DIT meeting, a stated goal was to have talking points about MTSS and implementation progress for the superintendent by the end of the day. Additionally, the MTSS coordinator and the DIT assisted one team member in preparing a presentation about MTSS and the MiBLSi partnership for the ISD board.

A communication plan delineates the flow of information and feedback among team members and stakeholders. One of the MTSS coordinators cited a strong communication plan as a key to their success in this role: “I’ve used the communication plan in almost all aspects of my job, so I think that that has been a big payoff thing.” The other two MTSS coordinators recognized the importance of the communication plan but had yet to find this level of success with it. One stated that they have struggled to find the time to create the plan:

We really need to communicate all of this information...and oftentimes we’re just not left with enough time in the day to develop an effective communication plan...I think our whole team would say that we need to get better at communication and feedback loops.

However, as one MTSS coordinator expressed in a MTSS Coordinator Network Meeting, “Communication needs to move beyond a plan on a page.” That is, creating the plan is not sufficient; its impact comes through putting it into action.

Two MTSS coordinators specified developing a stronger communication plan as a goal for their ISD teams, in addition to exploring more inventive modes of communication about MTSS and the implementation process across the ISD and districts. For example, they mentioned distributing a newsletter, a podcast, or video updates to summarize progress after each implementation team meeting. One MTSS coordinator posed a communication challenge to the DIT, in which team members were to use a medium other than email to communicate the monthly MTSS updates to the schools within their districts. The team was rewarded with a home-cooked breakfast for successfully completing the challenge. By using a creative, attention-grabbing format to communicate, the hope is to inform and motivate leaders in partnering districts to continue supporting this work and to inspire leaders in non-partnering districts to investigate the potential benefits of MTSS in their districts.

**Notable functions. *Guide problem-solving through data based decision making.***

Through their role descriptions, MTSS coordinators identified one function, guiding

problem-solving through data based decision making, as notable. That is, it was not as highly privileged as the two functions discussed above, yet it was perceptibly more critical to them than the subordinate functions, based on the frequency and manner in which they discussed it in their interviews. That said, all three of the MTSS coordinators labeled it as “critically important” when asked to rate its significance in their practice.

One MTSS coordinator overtly described using data to guide problem-solving as secondary only to the organization and coordination function, saying,

The organization and coordination piece, I think that’s the most important. And then the other big one really is using data then to make a decision about what the team needs, what the ISD team needs, what the school needs.

Another MTSS coordinator extended this description by stating, “For successful implementation, you need to have two things: team and data.”

MTSS coordinators assist districts and ISDs in analyzing data across buildings and levels. During a RFPS, one MTSS coordinator explicitly advised their ISD team to use data to develop a continuum of systemic support across elementary, middle, and high school levels. In a DIT meeting, a coordinator led the team through the planning of a data review sequence for the district and the buildings in it to ensure that priorities are adequately addressed across buildings. The coordinator advised the team to focus on alignment throughout the district.

Great satisfaction, noted one MTSS coordinator, comes from linking the data across the scope of the project to student learning by “seeing the work and what we’re measuring with those fidelity tools actually show up and be evidenced within our classrooms, where students can experience the benefits.” Another coordinator, in explaining to the DIT the differences and connections between fidelity data and outcome data, pointed out that fidelity data address the question “are we doing what we said we would do?” and outcome data asks, “if we’re doing what we said we would do, then is it having a positive impact on student

outcomes?” Data forges visible connections between the MTSS implementation process and student learning.

**Subordinate functions.** While the three functions discussed above were privileged or notable per the MTSS coordinators, the remaining four functions from the Practice Profile were subordinated. These functions include developing local training capacity, developing local coaching capacity, deepening personal knowledge of MTSS and implementation science, and developing a plan for continuous learning for the implementation team members. Classifying some of the subordinate functions in these interpretations is less clear-cut than it was in the voiced and documented representations of practice presented in Chapter IV.

***Developing a plan for continuous learning.*** Developing a plan for continuous learning for the implementation team members is simply classified as tacit. Across all nine MTSS coordinator interviews, it was mentioned only two times by one MTSS coordinator, and those references were to express uncertainty as to the meaning and relevance of this function in the Practice Profile. This is evidently a function that is neither on the minds nor in the workload of the MTSS coordinators.

***Deepening personal knowledge of MTSS and implementation science.*** All of the MTSS coordinators commented briefly on deepening their personal knowledge of MTSS and implementation science, but characterized it as embedded in the organize, coordinate, and co-facilitate function, rather than as a separate function in itself. “Deepening that personal knowledge comes in preparing to work for the district team, so anything I’m reading or studying or developing for that team is also deepening my own personal knowledge at the same time,” explained one coordinator.

***Developing and supporting local coaching capacity.*** None of the districts with which the MTSS coordinators work has moved into the stage of implementation where

coaching is necessary, since teachers are not yet implementing MTSS strategies in the classroom. Developing and supporting local coaching capacity is so far off of the MTSS coordinators' radar at this point that one of them stated, "I'm not even sure what that plan would be or how I'm supposed to support that." Due to the overt statements that developing local capacity to coach is not currently an important element of MTSS coordination, I have classified this function as suppressed.

***Developing and supporting local training capacity.*** It is more challenging to categorize developing and supporting local training capacity within its subordinate classification. This function was mentioned a few times by all of the MTSS coordinators, and was rated as being highly or critically important to their role, but the coordinators talked about it as being part of their work in the future, rather than something they focus on now. However, my observational data confront the MTSS coordinators' interpretations, as I had the occasion to observe them building training capacity with notable frequency.

Currently, the MTSS coordinators are doing the bulk of the training for districts and are enlisting other ISD consultants and specialists to assist them; as they move forward in the implementation process, they expect to move away from direct training and into technical assistance, in the interest of developing local capacity to sustain MTSS. As an example, in one district, a building-level content training sequence was planned for the upcoming summer and fall, in which the MTSS coordinator and a MiBLSi staff member were slated to lead the first round of training with select DIT members partaking in a "train-the-trainers" apprenticeship model. The expectation was that those local apprentices would assist with planning and adapting the material and delivery to meet the district's contextual needs, then co-facilitate the initial training session. The local trainers would then lead future iterations of the training sequence. In preparation for a similar train-the-trainers arrangement, another

MTSS coordinator has built rehearsal time for these new trainers into some of the DIT meetings.

### **Discussion: Functions**

The MTSS coordinators' interpretations of the functions of their own practice reinforce the documented and voiced representations of these functions (See Table 5.1: Privileging across Sources: Functions). Through a series of interviews and observations of their work, the MTSS coordinators demonstrated that they privilege the same two role functions as the Core Team: organize, coordinate, and co-facilitate the work of the ISD and District Implementation Teams and effective communication. These functions were depicted by both groups as being the mechanisms through which all of the other functions can be achieved.

The alignment of the documented and voiced representations with the MTSS coordinators' interpretations serves as evidence that these are truly the most critical functions of ISD level MTSS coordination. One MTSS coordinator articulated the critical importance of these two functions:

The ones that I feel...really affect everything you do in this role is the communication and...organize, coordinate, and co-facilitate the work of the ISD and District Implementation Teams, 'cause those two Critical Components of the Practice Profile really affect all of the others on this list. Regardless of whether you're helping to support training capacity or coaching support or helping to guide data review, you are having to communicate with a large number of people in an effective manner and you're having to do a lot of organizing and coordinating in terms of trainings, making sure the right people are talking to each other that need to be, making sure that they have all the resources that they need, the materials...that behind-the-scenes work that is necessary in order for all of these other parts to really be successful. I would say that those are, hands-down, the most important, because they affect everything.

As this coordinator has expressed, organizing, coordinating, and co-facilitating the work of the implementation teams is the defining function of MTSS coordination. Effective communication facilitates the organization and coordination function by fostering critical relationships and opening doors to implementation. Through effective communication, the

MTSS coordinator keeps implementation team members and other stakeholders appropriately informed of the processes, procedures, and practices needed to make MTSS happen at the local level.

The MTSS coordinators’ interpretations also enhance the Core Team’s privileging of the role functions by characterizing the use of data to guide decision making as a notable function, while the Core Team subordinated it. Unlike the privileged functions, which they described as all-encompassing, the MTSS coordinators defined guiding data based decision making as a unique task that drives successful implementation in a number of ways. Using data to drive decisions helps to give implementation a purposeful direction. In addition, as data based decision making is a cornerstone of the MTSS model, using it in the implementation process strengthens its sustainability by building local capacity to employ it.

**Table 5.1: Privileging across Sources: Functions**

<b>Function</b>	<b>Documented Representation<sup>12</sup></b>	<b>Voiced Representations</b>	<b>MTSS-C Interpretation</b>
<b>Organize, coordinate, and co-facilitate the work of the ISD and District Implementation Team</b>	n/a	Privileged	Privileged
<b>Effective Communication</b>	n/a	Privileged	Privileged
<b>Guide problem-solving through data based decision making</b>	n/a	Subordinate	Notable
<b>Develop and support local training capacity</b>	n/a	Subordinate	Subordinate
<b>Develop and support local coaching capacity</b>	n/a	Subordinate	Subordinate
<b>Deepen personal knowledge of MTSS data systems, practices, and the implementation research</b>	n/a	Subordinate	Subordinate
<b>Develop a plan for continuous learning for Implementation Team membership and appropriate staff</b>	n/a	Subordinate	Subordinate

The functions that the MTSS coordinators subordinated align with the lowest priority functions in the voiced representations of the design for practice. Developing and supporting local coaching capacity is not a relevant function in this early stage of implementation. As

<sup>12</sup> In the documented representation, the functions were equally weighted, without evidence of privileging.

MTSS implementation was not yet occurring in individual school buildings, the coaching of staff in MTSS practices was not yet appropriate or necessary. It can be anticipated, however, that this function will become more critical to MTSS Coordination in the future, as implementation moves forward.

At the time of the study, the MTSS coordinators, TAPs, and ISD consultants were conducting trainings at the district level. While the MTSS coordinators did not identify developing local training capacity as a privileged or notable function of their practice, observations of their work suggested otherwise. They were taking active steps, such as train-the-trainer opportunities, to develop the capacity of district personnel to begin providing content-based building-level training.

Deepening personal knowledge of MTSS and implementation science was described by the MTSS coordinators as being embedded within the other role functions. They claimed to learn primarily through preparing for and carrying out the tasks of their role, rather than by seeking out professional development opportunities. Success with this function, according to the MTSS coordinators, is largely a consequence of performing their other functions.

By subordinating developing a plan for continuous learning for the implementation team members, the MTSS coordinators reinforced the Core Team's eventual decision to remove this function from the Practice Profile.

On the whole, the MTSS coordinators' interpretations of their role functions reinforce the documented and voiced representations of the design for practice. This finding suggests that MiBLSi's architects have a strong vision of the priorities of this work and that the MTSS coordinators understand this vision and these priorities. The overarching theme of the conceptualizations of both the Core Team and the MTSS coordinators is that of enabling and informing the work of others in the interest of implementing MTSS. While the details

outlined in the Practice Profile may not have been mentioned or carried out precisely as specified, the spirit of the Critical Component was present both in word and in deed.

### **Competencies**

Now that the MTSS coordinators' interpretations and enactment of their role functions have been explored, the next step is to analyze the competencies that they use to carry them out. For this analysis, I investigated which skills and knowledge the MTSS coordinators believe to be important for the role and I observed how they draw on these capabilities in practice. Placing the MTSS coordinators' interpretation and enactment of the competencies associated with their role alongside the documented and voiced representations of the design for practice allow for an analysis of the alignment between the vision of the project designers and its real-life application. The findings in this comparison could have implications for the guidance offered by MiBLSi to develop the skills needed to be successful in this job.

For the analysis of the MTSS coordinators' interpretations of the competencies, I drew evidence from the three interviews I conducted with each of the three participants. I coded these interviews for explicit and implied allusions to competencies using the same conventions that I used to code the Practice Profile and the voiced representations by the Core Team members. I followed suit with my notes from field observations of the MTSS coordinators in various professional interactions, which I incorporated into the report to substantiate or challenge the interpretive data.

#### **MTSS Coordinator Interpretation & Enactment: Competencies**

In conjunction with their discussion of the functions of their role, the MTSS coordinators shared their thoughts about the competencies needed to perform those functions effectively. The analysis of these interpretations has exposed a limitation of reporting the aggregate responses of the group, as I have done in the previous discussions, in that there is a

noteworthy disparity among the interpretations. While some of the competencies were equally privileged, notable, or subordinate across participants, I discovered others to be highly privileged by one MTSS coordinator, only to be completely ignored by the others. This complexity caused a wrinkle in reporting the findings, on which I will elaborate in the following commentary.

**Privileged competencies.** The MTSS coordinators, as a group, privileged knowledge of MTSS and implementation science and time and task management over other competencies. Each of these competencies was mentioned numerous times by all three of the participants. In addition, I had the opportunity to observe both of these competencies in practice. Paradoxically, this finding both reinforces and confronts the documented and voiced representations of practice, which privilege knowledge of MTSS and implementation science, but which subordinate time and task management.

Extending the analytic dissonance, there are two situations in which one MTSS coordinator has privileged a competency in their interpretation while the others have subordinated it. In one instance, a MTSS coordinator repeatedly referenced the importance of having deep knowledge of the local context; in the other, one MTSS coordinator talked extensively about the benefits of having strong training skills. Although I frequently observed their enactment of both of these competencies, the remaining MTSS coordinators almost completely omitted them from their role descriptions.

***Knowledge of MTSS and implementation science.*** The MTSS coordinators, on the whole, discussed their knowledge of MTSS more frequently than other competencies in their interviews. Each MTSS coordinator comes from a different professional background, so their comfort with the various elements of this content varies. One MTSS coordinator mentioned having no prior experience with tiered support models, while another highlighted their extensive background in MTSS, including prior membership on ISD and building teams. The

third has experience working with MTSS' precursor, Response to Intervention (RtI), and is working to transfer the knowledge gained there to MTSS systems and practices.

The MTSS coordinators see themselves as gatekeepers of knowledge, in that they are the primary informational contact for the implementation teams at the ISD, district, and building level. They specified the importance of having a knowledge base in MTSS and implementation science when responding to questions and guiding the work of others. One MTSS coordinator expressed discomfort with the pressure of encountering questions outside of the realm of expertise:

As a coordinator it's really easy to field a question from a district team that you have absolutely no experience with...I'm not always able to answer those and I'm always honest with teams about that, but I always feel a little on the spot when those questions arise...You get questions all the time that aren't necessarily in your wheelhouse.

Another coordinator expressed confidence in the knowledge base, recognizing the importance of breadth over depth of expertise in this work by saying,

I feel I know enough about a lot of different things related to MTSS to provide support to other people. And as I build more knowledge I can provide more support and information to the people that I'm helping and supporting.

I observed this MTSS coordinator struggling with the limitations of a narrow expertise, alerting the DIT to it when presenting information about tiered support: "My expertise is in [one content area]<sup>13</sup>. I'll use that to introduce what tiered support is, then we can branch out to content areas, what that will look like vis-à-vis [another content area]."

Whether conveying confidence or the lack thereof, the MTSS coordinators agree that having a working knowledge about MTSS practices and implementation science is highly useful to this role. Fluency with the content allows them to focus on building the knowledge of others and guiding the local districts through the implementation process.

***Time and task management.*** The other competency that was privileged by the MTSS coordinators is time and task management. This aptitude encompasses the completion of

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<sup>13</sup> Details have been omitted from this quotation to protect the identity of the MTSS coordinator.

necessary work tasks in a timely fashion. While it may seem mundane in nature, managing time and tasks has a daily presence and impacts the success of all aspects of MTSS coordination. MTSS coordinators are not only responsible for completing their own work; they facilitate the time-sensitive and complex work of the implementation team.

Time and task management relies heavily on the MTSS coordinator's organizational skills. One MTSS coordinator described its importance by saying, "As a coordinator, we really need to be organized. We need to coordinate so many different groups of people that without those skills, things wouldn't get accomplished." This highlights the perspective that the ability to put structure to complex work and to complete multiple and varied tasks simultaneously and efficiently under time constraints is fundamental to fulfilling this role.

One of the ways they accomplish this is to co-create to-do lists and action plans with the ISD and district implementation teams at each meeting, delineating tasks for the MTSS coordinators and the team members alike. At the ISD TAG meeting I attended, for example, the MTSS coordinator and the team members co-completed a shared table for addressing each identified action plan. This table included the detailed expectations for completing the tasks as well as how the work would be assessed.

Most of the MTSS coordinators' commentary about time and task management centered on using organizational skills to overcome challenges they face in their work. The main barrier that they cited in relation to this competency was a lack of designated time for this role, since they all carry other consultant roles in their ISDs. According to the MTSS coordinators, many of their tasks, such as developing implementation and communication plans and preparing content for DIT meetings, are very time-consuming, and they struggle to complete them well within the allotted time. Adding to these barriers is the difficulty in finding times to meet collaboratively with other stakeholders and team members, which involves synchronizing schedules with other busy people.

In each of the districts I observed, the scheduling of meetings and trainings was done at least a few months in advance. At a May DIT meeting, for instance, the MTSS coordinator revealed that only three available days remained open in the August calendar. Participants were asked to use three words to predict the upcoming year during a MTSS Coordinator Network Adobe Connect call; one coordinator replied, “crazy busy scheduling.”

Another obstacle that MTSS coordinators tackle in the realm of organizational skills is the reliance on MiBLSi for the distribution of training content. This study was conducted while the DIT content was still under development, and the MTSS coordinators often received this resource with minimal preparation time before their DIT meetings. The MTSS coordinators all stated that they need the materials a minimum of a few weeks ahead of the meeting to feel well-prepared to contextualize, prepare, and deliver the content to the DIT.

One way in which MTSS coordinators might manage their time and tasks under these constraints is to set priorities. All of the MTSS coordinators, however, described having difficulties in balancing the priorities of their MiBLSi role with those of their other ISD positions. One of them stated that priorities shift with the urgency of other people’s needs, whether MTSS-related or not; if a crisis arises, the coordination work gets put on the back burner, to be done quickly or during their off-hours. Another said that priorities are schedule-driven, and that tasks are planned around the questions, “What’s my timeline? What needs to be done when?” The third MTSS coordinator was less ambiguous about priorities, saying that working directly with teachers and students in the consultant role always takes precedence over MTSS coordination, but that that can lead to issues with completing the MTSS-related tasks.

The privileging of this competency reflects the lived experience of the MTSS coordinator. While there may be more substantive competencies that seem important in terms of successfully facilitating the implementation process, the reality is that on a daily basis

MTSS coordinators are focused on trying to balance their responsibilities and complete their required tasks within challenging timeframes.

***Knowledge of the local context.*** Having a deep understanding of the local context in which they are guiding MTSS implementation was very highly privileged by one MTSS coordinator. In fact, this one coordinator raised the topic of context knowledge in their interviews more often than any other competency was mentioned, even across MTSS coordinators. For this MTSS coordinator, knowing the ins and outs of the local district is unmistakably the most important competency for this role. However, neither of the other two coordinators appears to share this perspective, given that they each only briefly touched upon it. In practice, I observed all three of the MTSS coordinators in the study drawing on their knowledge of the local ISD and district contexts in their guidance of the implementation work.

The MTSS coordinator who privileged knowledge of the local context highlighted the importance of customizing the content and process of implementation in establishing the sustainability of MTSS. The key to successful adaptation, they said, is to embed MTSS implementation in what the district is already doing; rather than having them create new systems and practices, the idea is to modify the systems and practices the district already has in place to accommodate MTSS. This requires knowledge of the district's existing structures. Because they feel they have a strong understanding of the local context, this MTSS coordinator said, "I can see big picture things about what I want the end goal to be, especially through the support MiBLSi has provided us, but I'm also able to see how does that actually fit in the real setting." This MTSS coordinator indicated that they feel confident in recognizing how the various elements of MTSS implementation will align with the district's priorities before introducing them to the DIT.

In practice, one MTSS coordinator leverages the district's prior non-MiBLSi experience with MTSS by using materials the district has already created and modifying them to ensure its alignment with the MiBLSi model. Another MTSS coordinator knows that the partnering district is motivated by MiBLSi's support in implementing Positive Behavior Intervention Systems (PBIS) with fidelity. This coordinator explained to the ISD implementation team at a RFPS that "They feel like they're implementing PBIS but they're missing a number of components. It's been five years since their three-day training," thus acknowledging the district's need to revisit their use of PBIS in order to achieve fidelity to the model.

One MTSS coordinator identified the biggest challenge of this role as maintaining the integrity of the project while meeting the contextual needs of the individual districts. In an ISD implementation team meeting, for instance, the group discussed how to overcome a school culture that discourages keeping and reporting data, when data based decision making is foundational to the MTSS model. Another MTSS coordinator concern stems from translating the implementation process, scope, sequence, and plan for a small school context. "When there's only one administrator, how many times can we expect him to be out for training?" asked the coordinator. Another coordinator reaffirmed that issue, saying to the ISD team that "They're so stretched; I can't imagine asking them for more than we're already asking them."

In explaining the differentiation of implementation support for districts, a MTSS coordinator said,

Although all of the key functions that need to come from our District Implementation Team meetings is the same, the form of how I approach it with each of our districts is different, based on their prior knowledge, based on their current practices they have in place, based on the make-up of their team in terms of different people's roles.

In the end, according to this MTSS coordinator, due to the consultancy relationship between the ISD and the district, the district's needs prevail over fidelity to the MTSS model. Another

of the MTSS coordinators reinforced that sentiment, stating, “I am a consultant for our county, all of our districts, and we have to support their needs. We’re not consultants for MiBLSi. So we have to do what the districts need, not necessarily what MiBLSi needs.” This coordinator demonstrated that mindset in a DIT meeting, telling the team,

If you look at the data and we’re getting help at K-3 but we need more at 4-5, if the data support that, then do it even if MiBLSi can’t support it. It’s not about MiBLSi; it’s about MTSS and what you need.

While local priorities take precedence, the MTSS coordinators concur that their objective is to find alignment or strike a balance between MiBLSi’s support and the districts’ needs.

***Training expertise.*** One MTSS coordinator privileged training expertise in describing the competencies required for this role; the other two subordinated this competency, in that one of them did not mention it at all, and the other only once. As with knowledge of the local context, this finding does not entirely reflect what I saw in practice. I observed all three of the MTSS coordinators draw on training expertise, particularly when leading the DIT meetings. All of the MTSS coordinators served as trainers for the DITs, introducing the teams to the concepts of MTSS and implementation science and guiding the adaptation and application of those concepts in the local educational context.

One MTSS coordinator regularly inserted customized activities into the training material for presenting and processing DIT content, which demonstrated an understanding of adult learning and a familiarity with the personality of the team. The MTSS coordinator who privileged training expertise talked about how leveraging previous experiences as a trainer in other contexts to inform the DIT training sessions. This coordinator said,

I guess in my experience with doing professional development in the past, I have experience in knowing what things you need to have in order to be prepared for a training, and I have experience in getting evaluation data back regarding trainings I have done, so I would say that’s one things that’s prepared me [for this role], but nothing formal.

The work of the MTSS coordinators at their partnering districts' current stage of implementation involves a heavy training component, for which this coordinator expresses feeling particularly well-prepared.

**Notable competencies.** The privileging of the MTSS coordinators' interpretations of the competencies required for their role was distributed across a continuum, ranging from highly privileged to completely tacit. I have labeled those competencies that fell into the middle of the continuum, neither privileged nor subordinated, as notable. These competencies include interpersonal skills, communication skills, data use, and leadership skills. Two of these – interpersonal skills and communication skills – were privileged in the Practice Profile and the Core Team interviews. The other two – data use and leadership skills – were tacit in the documented and voiced representations of the MTSS coordinator role.

***Interpersonal skills.*** All of the MTSS coordinators alluded to the value of interpersonal skills in their role interpretations, citing the importance of bringing together individuals from across the ISD and district with multiple viewpoints to work productively together toward the successful implementation of MTSS systems and structures. The MTSS coordinators included establishing buy-in, building mutual understanding, and facilitating communication among the implementation teams and local leaders as elements of their role. I observed MTSS coordinators engaged in continual interpersonal interactions throughout the study, both individual and with groups. I saw several situations in which the MTSS coordinators offered encouragement and praise to the DIT members, for instance. I also witnessed collegial collaboration among MTSS coordinators and TAPs during the MTSS Coordinator Network support sessions and statewide conferences.

According to the MTSS coordinators, bringing people together to work collaboratively is not always easy, since work in educational environments is historically

siloes. However, teamwork is vital to successful implementation, as one MTSS coordinator explained, because

If you don't have a team that you're coming together [with] to talk about things that are going well in the district and what needs are and brainstorm ways to come up with solutions to those needs, you ultimately have one or two people working really hard to do school reform, and one or two people can't do that.

**Communication skills.** Communication skills comprise the ability to share information effectively, efficiently, and appropriately with multiple parties for a variety of purposes. It also entails the give, take, and use of feedback. It could be argued that communication skills are embedded within the interpersonal realm; however, since when they were coded separately both competencies carried a similar level of privileging, I have determined that one is not embedded within the other and I treat them here as closely related but distinct.

One MTSS coordinator described the importance of knowing how to communicate with a variety of stakeholders, but expressed a need for additional support from MiBLSi in developing this competency. In particular, this coordinator specified the need for guidance in communicating with higher level administrators and ISD boards of directors to deepen their understanding of MTSS and to justify the allocation of resources. Another MTSS coordinator shared at the statewide coaching conference that if a barrier to implementation needs to be communicated to a higher level of the district, the DIT creates bullet points for the building administrator to bring to the superintendent. Another uses monthly MTSS Focus Days at the ISD to bring stakeholders together, communicate relevant information to them, and build their understanding and awareness of MTSS and the implementation process.

Two of the MTSS coordinators specified that their communication skills were gained through experience rather than training. For example, one MTSS coordinator explained that the ISD consultant role has enabled effective communication with multiple stakeholders:

[I'm] constantly communicating with a lot of different people: parents, students, teachers, principals, superintendents, and without experience I think it would be very difficult, because you have to know the times when how you interact with a teacher might be different than an administrator. So being able to differentiate communication is important, and I don't think that it's something that you can go to a training and learn how to do, it's more learn it as you go.

**Data use.** Each of the three MTSS coordinators spoke about the importance of knowing how to use data to guide the implementation team's work; however, their perspectives on data use varied. One coordinator described feeling very confident with using data, another is somewhat confident, and the third mentioned feeling limited due to a lack of confidence with data. The latter two both enlist other content area and data experts from their respective ISDs to assist with data review sessions.

The coordinator who is more confident with using data to inform decision making credited that expertise with improving the coordination and problem-solving components of the role. This coordinator explained,

It goes back to that process of data collection, having knowledge of different types of data that are available, where you get the data, how you access it. Once you have it, really having training and experience in looking at it and identifying strengths, identifying needs, doing the action planning, monitoring progress toward your goals.

The MTSS coordinator who expressed the least confidence with data use, on the other hand, described it as a source of anxiety. For example, when the DIT asked which data to review regularly, this opened a discussion but the MTSS coordinator was unable to provide an answer. This MTSS coordinator anticipates that, without developing a deeper personal knowledge of data systems, this type of situation will be exacerbated as the team moves forward and draws upon data in more diverse ways.

**Leadership skills.** All of the MTSS coordinators alluded to the importance of being able to lead a team. While the members of the implementation teams had previously been colleagues within their ISDs and districts, they had not necessarily worked together in this

type of endeavor. One MTSS coordinator explained this situation and the leadership aspect of the role by saying,

We were all members of different teams in a previous MTSS project but hadn't been on a team together, so it kind of felt like 'OK, we're all coming from different perspectives of MTSS. I need to find a way to get these folks working toward a common vision and a common goal.'

As part of facilitating the work of the implementation teams, the MTSS coordinator in this depiction leads the team members to a shared understanding of what the work is, how it will be accomplished, and why it is important. I observed multiple examples of all of the MTSS coordinators guiding the co-construction of the implementation process with the DITs. They enacted this by leading collaborative activities, distributing leadership, modeling practices and processes, and co-developing and monitoring action items.

Although all of the MTSS coordinators referred to past leadership roles they have held, two of them also said they felt somewhat underprepared for this aspect of their work at the onset. In one RFPS, I observed a MTSS coordinator's leadership break down. While the ISD team talked about creating a road map for tying MTSS to the accreditation process, the MTSS coordinator withdrew from the conversation after saying, "it's all just language to me." The TAP who was leading the discussion asked for the coordinator's thoughts, to which the coordinator replied, "I'm just overwhelmed right now," retreating again from the dialogue.

Each of the MTSS coordinators described a different means for improving on this competency. One MTSS coordinator has sought out external professional development activities to learn how to set up systems, create a team culture, and establish effective meeting practices. Another described it as a more organic evolution, with leadership skills evolving through the experience of facilitating multiple meetings per day. The third credited a strong team with bolstering their ability to lead effectively.

**Subordinate competencies.** As a group, the MTSS coordinators subordinated four competencies in their role interpretations: personnel management, coaching skills, use of resources, and assessment skills. Each of these skills was tacit across interviews, being mentioned briefly or in passing, if at all. The subordination of coaching skills, personnel management, and use of resources reinforces the findings in the documented and voiced representations of practice.

**Discussion: Competencies**

The MTSS coordinators’ interpretations of the competencies that most enable their work reinforce and enhance the documented and voiced representations of the design for practice (See Table 5.2: Privileging across Sources: Competencies). In illuminating the alignment between the most highly privileged competencies in the documented representations, voiced representations, and MTSS coordinator interpretations, these findings begin to reveal the competencies that most likely encompass the true knowledge and skills needed to enact MTSS coordination successfully.

**Table 5.2: Privileging across Sources: Competencies**

<b>Competency</b>	<b>Documented Representation</b>	<b>Voiced Representations</b>	<b>MTSS-C Interpretation &amp; Enactment</b>
<b>Knowledge of MTSS and Implementation Science</b>	Privileged	Privileged	Privileged
<b>Communication Skills</b>	Privileged	Privileged	Notable
<b>Interpersonal Skills</b>	Privileged	Privileged	Notable
<b>Context Knowledge</b>	Privileged	Subordinate	Privileged (1) Subordinate (2)
<b>Training Expertise</b>	Privileged	Subordinate	Privileged (1) Subordinate (2)
<b>Data Collection, Management, and Analysis</b>	Privileged	Subordinate	Notable
<b>Assessment Skills</b>	Privileged	Subordinate	Subordinate
<b>Time and Task Management</b>	Subordinate	Subordinate	Privileged
<b>Leadership Skills</b>	Subordinate	Subordinate	Notable
<b>Personnel Management</b>	Subordinate	Subordinate	Subordinate
<b>Coaching Skills</b>	Subordinate	Subordinate	Subordinate
<b>Use of Resources</b>	Subordinate	Subordinate	Subordinate
<b>Collaboration</b>	Subordinate	Subordinate	Subordinate

In their interviews, the MTSS coordinators privileged the knowledge of MTSS and implementation science, which is also a highly privileged element of the design for practice. This competency also relates to the universally privileged functions of organizing, coordinating, and co-facilitating the work of the ISD and District Implementation Teams and effective communication. Fluency surrounding MTSS and implementation science will likely strengthen the MTSS coordinators' success as the primary source of information for district administrators and implementation teams. The MTSS coordinators expressed feeling discomfort in not knowing enough along with a pressure to know more; the challenge facing the project is in guiding the MTSS coordinators to the appropriate balance between the breadth and depth of their knowledge.

The privileging of time and task management by the MTSS coordinators confronts the subordination of this competency in both the Practice Profile and the Core Team Members' representations of the role design. However, this finding aligns with the MTSS coordinators' privileging of organizing and coordinating the work of the ISD and District Implementation Teams. Organizational skills enable the coordination of local implementation work to happen efficiently by putting structure to complex tasks. They allow the MTSS coordinator to fit their MTSS Coordination functions, which are not always their top professional priorities, into the limited time allotted for this work. The privileging of this competency reflects the daily challenges that MTSS coordinators face, which the Core Team Members may not have taken into account when envisioning the competencies needed to carry out this role.

Two competencies were each privileged by one MTSS coordinator and subordinated by the other two. This discrepancy may be due to a number of factors. One MTSS coordinator described knowledge of the local context as highly important to the role. It could be, for example, that this coordinator works with a district that has especially unique needs,

and that customizing the implementation process and content to fit that context is a continual challenge. Another MTSS coordinator privileged training expertise, expressing it as an area where professional experience has been beneficial to implementation. This coordinator's confidence may have fed into this privileging; it is conceivable that these skills are applied more heavily to compensate for areas where the coordinator's preparation is less solid.

I found communication and interpersonal skills, which were highly privileged in the design for practice, to be only notable among the MTSS coordinators. This is a surprising finding, given that the MTSS coordinators privileged the effective communication function, which arguably would be enriched by these skills. It is possible that the MTSS coordinators draw on these competencies more frequently than they realize. It could also be that, while they recognize the importance of communication and interpersonal skills, they did not feel the need or find the occasion to talk about them at length in the interviews. Finally, one could hypothesize that the MTSS coordinators intertwined the effective communication function with communication and interpersonal competencies and thus did not elaborate as much on the skills.

Data use was identified as a notable competency among the MTSS coordinators' role descriptions, which reinforces the finding that using data to solve problems was categorized as a notable function. While they talked about data as being a driving force in decision making and determining the direction of the implementation work, it is not, as they described it, at the forefront of their current daily work. As they move forward in implementation, districts will begin to collect and use more data to drive the process, and the MTSS coordinators may find that their priorities shift in this direction as that happens.

Leadership skills' designation as notable reinforces the privileging of the organization and coordination function by the MTSS coordinators. In this role, the MTSS coordinators lead others to do the work of installation and implementation of MTSS systems and

practices. The subordinated competency of personnel management could debatably be embedded in the leadership domain.

The subordination of assessment skills, while it reinforces the findings in the voiced representations of practice, confronts its privileging in the documented representation. Although determining the support needs of districts was mentioned a few times by two of the MTSS coordinators, the ability to do this does not carry the weight with this group as it does in the Practice Profile. The case could be made that assessment skills are embedded in the knowledge of the local context, a competency that was privileged by one MTSS coordinator, in that understanding the contextual factors of a district impacts one's ability to assess its readiness for MTSS implementation and to determine the appropriate level of support for the implementation process.

### **Guidance**

Having analyzed the MTSS coordinators' interpretations and enactment of the functions and competencies associated with their role, the final step in investigating this set of research questions is to learn how the coordinators view and engage with the various modes of guidance available to support their work. Paralleling the previous sections in this chapter, I will introduce the MTSS coordinators' interpretations of the guidance for their practice, drawn from interviews. I will enrich that analysis with evidence from observations of the MTSS coordinators' interactions with the various modes of guidance. Weighing the MTSS coordinators' interpretation and enactment of the modes of guidance against the documented and voiced representations of guidance will reveal how well the project designers have anticipated the needs of the MTSS coordinators as they carry out their role. These findings could serve to inform future iterations of the system of supports offered by MiBLSi to the MTSS coordinators.

## **MTSS Coordinator Interpretation & Enactment: Guidance**

In their interviews, all of the MTSS coordinators expressed an appreciation for the multifaceted array of supports offered by MiBLSi to guide their work. They describe MiBLSi's support as responsive to MTSS coordinators' needs, resembling a coaching model more than a training program. According to one coordinator, "They have just systematically coached us every step of the way."

All of the MTSS coordinators claimed to have accessed every mode of guidance provided by MiBLSi, albeit to varying degrees; two forms of guidance were privileged above the others. The MTSS coordinators placed the highest importance on the Technical Assistance Partners (TAPs) and the MTSS Coordinator Network meetings. According to one MTSS coordinator, "If I didn't have those continual conversations with my local TAP or with the MTSS coordinators group, you just forget about some of those important things." My experiences with the MTSS coordinators support this privileging, in that I had more frequent opportunities to observe them engaging with these two modes of guidance than with any of the others.

Supports of notable value to the MTSS coordinators - those that were important in their descriptions but not emphasized enough to be considered privileged - include the DIT content and trainer workdays. My observational data appear to corroborate this finding, although I was only able to attend and observe one trainer workday, so the data are incomplete. The MTSS coordinators placed the least stock in the statewide conferences, online modules, and RFPS.

**Privileged modes of guidance. *Technical Assistance Partners.*** Far and away, the TAP was the most highly privileged mode of guidance per the MTSS coordinators. This privileging was evident in the frequency with which the MTSS coordinators talked about their TAPs (twice as many overall mentions as the next most privileged mode of guidance),

from the language they used to describe this support, and by the continual opportunities to observe them interacting with TAPs. “Support from ... my Technical Assistance Partner is probably the biggest,” said one coordinator. Another overtly characterized the TAP as their primary source of guidance: “I would say the main support was our Technical Advisers, and that remained constant throughout the year.”

The MTSS coordinators described staying in continual contact with the TAPs, primarily via email and telephone, with occasional in-person meetings. One MTSS coordinator elaborated that they consult with the TAP “via email a couple times a week and via phone twice a month, on average.” The substance of these conversations include clarification of content, support in preparing for DIT meetings and data reviews, and questions about communicating with stakeholders, for example. All of the MTSS coordinators have described their TAPs as readily available and responsive on an as-needed basis. This accessibility allows for real-time assistance, which they said helps move the implementation process forward with efficiency.

The MTSS coordinators depicted the TAPs’ assistance primarily as helping to prepare for DIT training sessions and modifying content to fit local contextual needs. A MTSS coordinator described the value of this support by saying that “working with our TAP side-by-side to do the content and learning the content [together] has been really helpful. It’s a big piece of being able to lead the training.” One coordinator meets with the TAP and a co-trainer for a half-day before each DIT meeting to prepare the content and plan its delivery. Another explained that after drafting modifications for a district, “I have to then converse with [the TAP] to make sure that the changes I’m making remain a good fit for my districts but also uphold the integrity of the project.”

In addition to helping plan DIT meetings, TAPs take on a noteworthy role in facilitating them. This was particularly noticeable in the fall DIT meetings, when all three of

the TAPs were the primary presenters, with the MTSS coordinators in supportive roles. In each case, when the MTSS coordinator took turns in leading or facilitating the sessions, the TAP was available to assist in such ways as fielding questions, making connections to the bigger picture of implementation, and foregrounding upcoming work. On several occasions, I witnessed MTSS coordinators directly asking their TAPs for help during the DIT presentation, seeking support, for example, with the order of operations for DIT tasks, the rationale behind a procedure, or the training progression plan.

According to the MTSS coordinators, the TAPs' support of MTSS coordination goes beyond what I was able to directly observe. Outside of DIT meeting preparation and presentation, TAPs advocate for MTSS coordinator support needs, offer advice to the MTSS Coordinator Network, assist with communication to administrators, help with scheduling, and bust barriers to implementation. Beyond the technical realm, TAPs provide moral and emotional support to MTSS coordinators when the work becomes overwhelming. One coordinator went so far as to refer to the TAP as a "MTSS coordinator therapist."

***MTSS Coordinator Network meetings.*** While they did not privilege it as highly as the TAP support, the MTSS coordinators highlighted one other source of professional guidance: the monthly MTSS Coordinator Network meetings. One MTSS coordinator plainly articulated this difference in privileging, saying that "the monthly meetings have been helpful but not as helpful as the T.A. support." These meetings, which take place either online through Adobe Connect or in person, allow MTSS coordinators to connect with colleagues from across the state. The stated focus of these meetings has been to deepen content knowledge, to prepare and troubleshoot DIT content, and to provide guidance in developing implementation support plans. They also allow the coordinators to interact with and ask questions of the Technical Assistance Coordinator, the TAPs, and other MTSS coordinators.

The MTSS coordinators in the study described the MTSS Coordinator Network meetings as good opportunities to connect with colleagues and expressed a preference for the face-to-face meetings over the online sessions. One coordinator shared in detail the challenges with the Adobe Connect online format, saying that it is difficult to stay engaged for two hours, “staring at the computer with the speaker phone,” but that the interpersonal interaction of the live meetings are useful and enjoyable. This coordinator expressed a desire for more frequent in-person occasions to share and troubleshoot common problems as a group.

Sharing and tackling common problems of practice, in my observations, happened both formally and informally during the MTSS coordinator meetings. For example, during one Adobe Connect call, a MTSS coordinator typed the following question into a group chat box: “How long do people take to get through online module with DIT? Pacing advice?” The group then offered a variety of responses and advice stemming from their own practice. More formally, one of the face-to-face meetings was structured around problem of practice conversations. MTSS coordinators self-selected into groups to discuss pre-determined topics (e.g. implementation in rural contexts and communication with stakeholders) using a specific protocol.

Across time, the MTSS coordinators’ tone shifted with regard to the MTSS Coordinator Network Meetings, which added a twist to their privileging of this mode of guidance. While the coordinators spoke optimistically about the meetings in their fall interviews, by the spring their attitude toward them had changed. One of the issues they cited in the later interviews was a lack of meaningful content. For example, one MTSS coordinator said, “You usually get one good idea out of those meetings.” Another reiterated that “some of the topics sometimes didn’t apply and weren’t so helpful...” then went on to admit that “...just the big idea of what they were trying to do was helpful.”

The third coordinator foresaw a reduction in the Adobe Connect calls in the future, revealing that they were helpful at the onset but became less of a priority as the demands of the implementation work increased and the MTSS coordinators became more competent and confident in their role. Another MTSS coordinator agreed, saying, “I would say in the second half of the...school year, I probably spent less time engaged in those monthly meetings just due to other tasks that I’d taken on as a coordinator.” The feeling expressed across the group was that, over time, these meetings began to take a back seat to other work. This finding was further evidenced by the dwindling attendance at these meetings across the year.

**Notable modes of guidance. *District Implementation Team content.*** The DIT content was also prioritized enough by the MTSS coordinators to be categorized as notable in this analysis. Each MTSS coordinator talked about it moderately, sharing both how it is helpful and in what ways it causes challenges in their work. In observing DIT meetings, I saw MTSS coordinators drawing heavily on this content, both using it verbatim and massaging it to fit the local context and their own preferences as presenters. Each MTSS coordinator shared and read aloud from most of the slides that MiBLSi provided. Even where they customized the material, MTSS coordinators consistently used the language from the DIT content in their presentations. They shared and actively used the MiBLSi-created handouts and alerted the team members to any changes that were made. The MTSS coordinators appreciate the way in which the MiBLSi-developed content spells out the agenda, information, and tasks for each DIT meeting.

According to the coordinators, the prepared DIT content provides them with a clear guideline to follow in facilitating the team’s work. One of the MTSS coordinators specified an appreciation for the step-by-step organization of information, along with concrete explanations and examples of upcoming tasks. This coordinator marveled that, “... the level of specificity that we’ve been provided from MiBLSi has been like nothing I’ve ever seen.”

Knowing what to expect allows this coordinator to anticipate of the implementation team's questions about the process and the action steps within it. Reinforcing this sentiment, a district superintendent commented during a DIT meeting,

The thing that I really like about these MiBLSi guys: they're showing us how to do it. We've studied...a lot of other groups that are presenting similar information. But this is really clear. This is *how* we help kids, this is the next step, this is a very well-conceptualized plan.

Another MTSS coordinator similarly indicated that the DIT content provided by MiBLSi has assisted in providing support to the districts in tasks such as creating an assessment audit or developing a communication plan. Describing the usefulness of this content in detail, this coordinator said that

Really they've provided us with power points to guide us step-by-step through the tools. They've provided support in gathering some student outcome data for our districts. They've given us a guideline to follow in terms of what we did earlier in the year for collecting information for our districts.

MiBLSi's DIT content is not without its challenges, however. The most common complaint among the participants was that because the MTSS coordinators rely on it for preparing the DIT meetings, they are beholden to MiBLSi's timetable for distributing it. Sometimes, that means a very tight turnaround time to become familiar with the content, to customize it to the local context as necessary, and to prepare any materials to be distributed to team members. While the DIT content is sometimes available several weeks ahead of time, its occasional late arrival causes stress and feelings of unpreparedness in all of the MTSS coordinators. Additionally, MTSS coordinators expressed feeling a lack of ownership over the content and materials they present, as they had not taken part in creating them.

***Trainer workdays.*** While they were not privileged to the extent of the TAPs or MTSS Coordinator Network meetings, trainer workdays were mentioned frequently enough by the MTSS coordinators to be considered notable in this analysis. The majority of the

trainer workdays are recorded for the MTSS coordinators to watch individually and on their own time; my observational data only include one in-person trainer workday.

During a side conversation at a MTSS Coordinator Network face-to-face meeting, one coordinator talked optimistically about the trainer workday sessions, describing them as essential to the implementation process. The coordinator described feeling somewhat disconnected from the prepared DIT content, not having been involved in its research and development. The trainer workday recordings, the coordinator said, compensate for that lack of ownership by modeling the presentation, anticipating questions, and then allowing time for the MTSS coordinator to work independently or with the TAP to finalize the preparations. This thought was reinforced by the Technical Assistance Coordinator's commentary during a MTSS Coordinator Network meeting that the MTSS coordinators should take advantage of the opportunity to use the trainer workday prior to planning and delivering DIT content, since MiBLSi staff members, including TAPs, are present. However, she said, as the capacity develops within the ISD to lead this work, that scaffolding will be removed.

According to the MTSS coordinators, the trainer workday format, which permits in-person or online viewing, allows for flexibility in participation. The ability to watch the recording at one's own convenience means that coordinators can avoid the inconveniences of travel to a training site at a fixed time. Also, they can choose to watch the recording alongside their TAPs, stopping to discuss questions and potential barriers and to make context-based adaptations to their presentations accordingly.

The trainer workday I observed was a face-to-face meeting that attended to preparing DITs for data review days. During that session, MiBLSi staff members presented a new data management system called MiData, which the Evaluation and Research Unit designed for use by MiBLSi partners. As they learned about the new system, MTSS coordinators

interacted with one another, sharing challenges from previous data reviews and ideas for moving forward. For example, a MTSS coordinator shared that one district does not have a way of making decisions about initiatives, but is optimistic that this will be part of the revised data review format. Another disclosed that the DIT had prior issues with moving from student outcome data to process or fidelity data. The trainer workday provided the coordinators with the time and space to interact with one another about these types of challenges and about the upcoming content under the guidance of MiBLSi staff.

One MTSS coordinator did express the concern that, while walking through the DIT content in the trainer workday sessions is helpful, the way in which the material is presented can be confusing:

During these training days when we have the training of the trainers content, it's kind of confusing the way they do it, because they have the booklet of what we're going to be training and the power point that goes along with that, and then the booklet and the power point that's from today's training content, and they don't align.

This coordinator went on to suggest that it might be more helpful to have an overview of the content rather than a slide-by-slide walk-through of the training presentation. Neither of the other MTSS coordinators shared any negative or constructive commentary about the trainer workdays.

**Subordinate modes of guidance.** Three of the modes of guidance offered by MiBLSi were subordinated in the MTSS coordinator interviews. These include the statewide conferences, online modules, and RFPS. All of these modes of guidance were rarely mentioned in any of the MTSS coordinators' interviews, thus I categorized them as tacit. While all of the MTSS coordinators listed these three modes of guidance when describing MiBLSi's system of support, they did not provide many details about them; when they did elaborate on them, the commentary was generally pessimistic.

I did have the chance to attend statewide conferences in the spring and fall, as well as several RFPSs. Because the online modules were introduced during the course of the study

year, and because they were to be viewed individually by the MTSS coordinators before being shared with the implementation teams, I did not observe them in active use.

***Statewide conferences.*** The MTSS coordinators' commentary about the statewide conferences was sparse; the statements they did make were generally pessimistic. One of the MTSS coordinators, for instance, specified that the most recent state conference was not very helpful in that it provided no new learning for either the coordinator or the ISD and district team members who attended. At this conference, MTSS coordinators, along with others involved in implementation, were encouraged to think deeply about communication, leadership, and content. The majority of the MTSS coordinators' time during the conference was spent sitting and listening to expert presenters. Despite this opportunity to deepen their knowledge, all of the MTSS coordinators specified that having time to meet with their own teams and/or interacting with participants from other ISDs/RESAs were the most valuable features of this conference.

***Online modules.*** Brand new to MiBLSi's system of support, the online modules were not yet familiar to MTSS coordinators when I began to interview and observe them. When they did mention the online modules, the participants shared that they had some technical issues in connecting to them and that, while some are interesting, others are monotonous and not very engaging. I observed two MTSS coordinators introducing the concept of the online modules to their DITs. One of them led an activity to orient the team to the menu of online module topics; the other showed a short clip of the "Ready, Set, Go!" introductory module, with the plan to share it with the high school faculty in an upcoming meeting. The actual scope of the online modules' utility for coordinators and implementation teams will be revealed over time.

***Regional Focus Planning Sessions.*** The MTSS coordinators communicated in their interviews that the focus of the RFPS had become too narrow to be meaningful to all

participants. In the initial year, they said, more attention was given to the big picture of district wide implementation and was thus viewed as more universally worthwhile. In my observations during the subsequent year, the RFPSs were used for ISD implementation team planning and goal setting related to the implementation process, data use, and scale-up.

### **Discussion: Guidance**

The MTSS coordinators' interpretations of the modes of guidance that best support their work reinforce the voiced representations of the design for practice (See Table 5.3: Privileging across Sources: Guidance). By uncovering the conformities between the most highly privileged modes of guidance among the voiced representations and the MTSS coordinator interpretations, these findings build the case that these are the cornerstones of MiBLSi's support of MTSS coordination, and that they should be continued and possibly enhanced.

The MTSS coordinators identified the TAP and the MTSS Coordinator Network meetings as the most highly privileged modes of guidance, which aligns with the Core Team's perspective. Unlike recorded sessions or documents, these two types of guidance are human, interactive, dynamic, and responsive to MTSS coordinator needs. What the MTSS coordinators say they appreciate about these two privileged forms of support, and in particular the TAP support, is their adaptability to differing coordinator needs, which the static, recorded, and scripted modes of guidance are less equipped to do. This finding is in accord with the collective privileging of the effective communication function and of interpersonal and communication skills; a picture of this work as individualized and relationship-based is beginning to emerge.

The findings also reveal alignment between the MTSS coordinators' interpretations and the Core Team's voiced representations regarding several subordinate modes of guidance. The statewide conferences, online modules, and RFPS were subordinated across

all sources. In the case of the statewide conferences and the RFPS, the MTSS coordinators not only withheld commentary, what they did say was less than positive. These findings indicate areas in which MiBLSi might consider redesigning or scaling back their efforts. Since the online modules were introduced mid-year, their subordination was likely due to a lack of experience and exposure. Time and experience will reveal whether and how they will become integral to the MTSS coordinators' array of useful resources.

**Table 5.3: Privileging across Sources: Guidance**

<b>Mode of Guidance</b>	<b>Documented Representation</b>	<b>Voiced Representations</b>	<b>MTSS-C Interpretation</b>
<b>Technical Assistance Partners</b>	n/a	Privileged	Privileged
<b>MTSS Coordinator Network Meetings</b>	n/a	Privileged	Privileged
<b>District Implementation Team Content</b>	n/a	Subordinate	Notable
<b>Trainer Workdays</b>	n/a	Subordinate	Notable
<b>Statewide Conferences</b>	n/a	Subordinate	Subordinate
<b>Online Modules</b>	n/a	Subordinate	Subordinate
<b>Regional Focus Planning Sessions</b>	n/a	Subordinate	Subordinate

Two modes of guidance were subordinated in the voiced representations of the design for practice but were notable in the MTSS coordinators' interpretations: DIT content and trainer workdays. As the MTSS coordinators describe themselves as highly busy people, often without sufficient allocated professional time to carry out all of their ISD roles, these opportunities to reduce the amount of individual time and energy spent planning for DIT meetings is understandably highly valuable. Given this finding that the MTSS coordinators expressed seeing a greater benefit in these forms of support than the Core Team members did, it would be worthwhile for the program architects to consider focusing more attention on strengthening those modes of guidance.

The DIT meeting content that MiBLSi develops and provides to the MTSS coordinators was found to be notable in the MTSS coordinator descriptions of guidance. Making this material available supports content knowledge and training expertise, both

competencies that were privileged by at least one coordinator. Like the trainer workday sessions, the DIT content is often processed with direct TAP support, so it could also be considered embedded in, or at least coupled with, the TAP guidance.

The timing of MiBLSi's release of each DIT meeting's content impacts the time and task management competency and the organization and coordination and communication functions of the MTSS coordinators' role. A late release requires more focused time and task management on the MTSS coordinators' part and the tight turnaround affects their ability to communicate the content ahead of time to get the pre-work for the session done.

The online format of the trainer workdays allows for flexibility, which aligns with the privileged time and task management competency. Given that the MTSS coordinators can watch it alongside their TAPs, pausing to unpack and modify the content, it also could be considered to be intersecting with, or even embedded in, the TAP support. In the face-to-face trainer workday that I observed, TAPs and MTSS coordinators sat together and pre-corrected the MiBLSi-designed DIT content to fit their local contexts.

Unpacking these findings leads to an indication that the TAP is the real focal point of MiBLSi's system of support for MTSS coordinators. Not only is it the most highly privileged mode of guidance by the Core Team and the MTSS coordinators in and of itself, interactions with the TAP are interwoven into all of the other modes of guidance, save the online modules. TAPs work with the MTSS coordinators individually and through the trainer workdays to plan and prepare meetings based on the DIT content that MiBLSi provides, and they participate actively in the MTSS Coordinator Network meetings, the Regional Focus Planning Sessions, and the statewide conferences.

## **Discussion**

Overall, the analysis in this chapter demonstrates that the ostensive design and the performative role of MTSS coordination reinforce one another (See Table 5.4: Privileged

Components: Ostensive vs Performative). The documented and voiced representations of the design for practice privilege the same functions (organize, coordinate, and co-facilitate the work of the ISD and District Implementation Teams and effective communication) and modes of guidance (Technical Assistance Partners and MTSS Coordinator Network meetings) as the MTSS coordinators do. This alignment suggests that the MTSS coordinators are appropriately interpreting the design for practice and/or that the project’s architects have accurately identified and predicted the predominant functions and guidance for successful MTSS coordination.

**Table 5.4: Privileged Components: Ostensive vs Performative**

	<b>Ostensive Design</b>	<b>Performative Role</b>
<b>Function</b>	<ul style="list-style-type: none"> <li>Organize, coordinate, and co-facilitate the work of the ISD and District IT</li> <li>Effective Communication</li> </ul>	<ul style="list-style-type: none"> <li>Organize, coordinate, and co-facilitate the work of the ISD and District IT</li> <li>Effective Communication</li> </ul>
<b>Competency</b>	<ul style="list-style-type: none"> <li>Knowledge of MTSS and Implementation Science</li> <li>Communication Skills</li> <li>Interpersonal Skills</li> </ul>	<ul style="list-style-type: none"> <li>Knowledge of MTSS and Implementation Science</li> <li>Time &amp; Task Management</li> </ul>
<b>Guidance</b>	<ul style="list-style-type: none"> <li>Technical Assistance Partners</li> <li>MTSS Coordinator Network Meetings</li> </ul>	<ul style="list-style-type: none"> <li>Technical Assistance Partners</li> <li>MTSS Coordinator Network Meetings</li> </ul>

However, there is some tension between the ostensive and performative perspectives on the competencies required to enact MTSS coordination. While the documented and voiced representations and the MTSS coordinators all converge on the privileging of the knowledge of MTSS and implementation science, communication skills and interpersonal skills are privileged in the ostensive role design, whereas these competencies, while not subordinated, are only notably valued by the MTSS coordinators. This difference is not one of direction but of degree; when looked at in the aggregate, we can conclude that

communication and interpersonal skills are more privileged than most of the other competencies.

A more divisive and concerning discrepancy is that the MTSS coordinators privilege time and task management as a competency, which is subordinated in both the documented and voiced representations of practice. The inconsistency in this finding could be due to the role designers' attention to broader elements of coordination, rather than daily tasks. To borrow an analogy from MiBLSi's training content, one can picture the Core Team on a balcony overlooking the MTSS coordinators on the dance floor. In this image, the Core Team members are seeing the big picture, the general movements among the dancers, whereas the MTSS coordinators are taking the steps, seeing the details, and feeling the reality of the work. Their competence and confidence are affecting the decisions they make, and they respond to the movements of the others with whom they are expected to synchronize.

On the other hand, the Core Team may have been operating under the assumption that time and task management is so embedded in the work that its importance goes without saying. The MTSS coordinators, however, face a daily reality of having to balance and manage a number of tasks, people, and resources. From their standpoint, this aptitude is omnipresent and at the forefront of their success. While some MTSS coordinators might come by this competency naturally, for others it likely represents a daily challenge that impacts their effectiveness.

### **Conclusion**

In this chapter, I have presented the features of MTSS coordination through the lens of those who perform it, representing their interpretations of and experiences with enacting this function. Using a modified version of the framework presented in Chapter IV, I identified the MTSS coordinators' perspectives of the functions, competencies, and modes of guidance as they pertain to their role. I used data from field experiences with the MTSS

coordinators enacting these role components to illustrate and support these interpretations. I then compared the privileging of certain elements of practice by the MTSS coordinators with that of the documented and voiced representations of MTSS coordination.

The documented representations, voiced representations, and MTSS coordinator interpretations of practice converge on a set of highly privileged functions, competencies, and modes of guidance. This result suggests that there are certain dimensions of MTSS coordination that are more critical to successful practice than others (See Table 5.5: Most Highly Privileged Components of MTSS Coordinator Practice). We can conclude that these are the linchpin components of successful MTSS Coordination.

**Table 5.5: Most Highly Privileged Components of MTSS Coordinator Practice**

<b>Function</b>	<b>Competency</b>	<b>Guidance</b>
<ul style="list-style-type: none"> <li>• Organize, coordinate, and co-facilitate the work of the ISD and District Implementation Team</li> <li>• Effective Communication</li> </ul>	<ul style="list-style-type: none"> <li>• Knowledge of MTSS and Implementation Science</li> <li>• Communication Skills</li> <li>• Interpersonal Skills</li> </ul>	<ul style="list-style-type: none"> <li>• Technical Assistance Partners</li> <li>• MTSS Coordinator Network Meetings</li> </ul>

Across sources, the most highly privileged functions of MTSS coordination are organize, coordinate, and co-facilitate the work of the ISD and District Implementation Teams and effective communication. To carry out these functions, the most highly favored competencies are the knowledge of MTSS and implementation science, communication skills, and interpersonal skills. TAPs and MTSS coordinator meetings have been collectively identified as the essential modes of guidance for developing those competencies and performing these functions. It will be in the best interest of MiBLSi to focus their energy and resources on further developing these dimensions of MTSS coordination going forward.

In the upcoming chapter, I will round out my inquiry by investigating how MiBLSi collects and processes feedback regarding the alignment between the design for practice and its interpretation and enactment by MTSS coordinators, and what it does – or could do – with that information.

## CHAPTER VI

### FINDINGS: CONTINUOUS IMPROVEMENT

*How does the organization collect, process, and apply feedback for the continuous improvement and refinement of the role expectations and support of the network-based coordinators?*

#### **Introduction**

In the previous two chapters, I presented MiBLSi's documented and voiced designs for the MTSS coordinator role, along with the ways in which the role incumbents interpret and enact these expectations. I also described the supports that MiBLSi provides for the MTSS coordinators to carry out their role. Given that information, the task at hand is to reach for an understanding of how MiBLSi gathers evidence about MTSS coordinators' practices and needs, then uses that evidence to inform the specific design and systemic support of this work. We will look now at how MiBLSi engages in a continuous improvement process with specific regard to MTSS coordination.

In this chapter, I reveal how MiBLSi collects and compiles information from a variety of sources about the MTSS coordinator role, then processes it and uses it to strengthen the role design and guidance for its enactment. For this analysis, I examined data from multiple sources to assemble a representation of the means by which MiBLSi collects and processes feedback about the MTSS coordinators' role enactment, as well as examples of how this learning has been put into action.

To begin this report, I provide some clarification around key terms and my unique stance with regard to this analysis. I present prominent models of continuous improvement to

shed light on the theoretical grounding for this chapter, then I describe MiBLSi's continuous improvement process vis-à-vis MTSS coordination. From there, I explain in detail how MiBLSi collects and processes feedback. To conclude, I present ways in which MiBLSi has put this learning into action and I offer recommendations as to how modifications to MiBLSi's role expectations and guidance structure could improve MTSS coordinators' performance and, in turn, increase the fidelity of implementation and the efficiency of the district-level capacity-building for which they are responsible.

### **Researcher Stance**

While collecting evidence and developing inferences about the functions, competencies, and guidance associated with MTSS coordination, I became equipped to inform MiBLSi's leaders about the intricacies of the role and to make recommendations for the support of those performing it. As I was now armed with this specific knowledge about MTSS coordination, as well as an academic background in educational leadership and organizational studies, the Core Team recognized the potential value in enlisting me as a source for regular feedback, and they hired me into the project as a consultant and a member of the MTSS Coordinator Network Core Planning Team and its affiliated Pit Crew. Thus, I write about continuous improvement within the project from a unique perspective, having been both an observer of the process and a contributor to it. Within the narrative that follows, I will elaborate on my role and functions in the collection and processing of information toward improving systemic supports to MTSS coordinators.

### **Definition of Terms**

Within this chapter, there are several fundamental terms that, on the surface, may seem clear and straightforward. However, upon deeper consideration, they are interpretable; to presume a common understanding of these concepts within the context of this study could

open this analysis to confusion or misconception. Thus, to eliminate assumptions and perplexities, I present these terms here as I intend them to be interpreted in this report.

**Collect, process, and apply.** At the center of this research question are the terms *collect*, *process*, and *apply* feedback. For the purposes of this study, to *collect* feedback means to gather information about the function, capacity, and guidance of MTSS coordinators. *Process* refers to the management and analysis of the feedback data once it has been collected. I use the term *apply* to indicate when the feedback is being put into action to improve the definition, expectations, or support of the MTSS coordinator role.

**Organizational learning.** Throughout this analysis, I refer to *organizational learning* and *organizational growth*. There are multiple perspectives and theories about organizational learning, which I discussed in greater depth in Chapter II. In their review of literature about organizational learning, Fiol and Lyles (1985) offer a broad and simple aggregate definition that informs my interpretation of the term in this chapter: “Organizational learning means the process of improving actions through better knowledge and understanding” (p.803). Herein, I use *organizational learning* to indicate the desired outcomes of continuous improvement, particularly with regard to the expectations for, and guidance of, MTSS coordinators.

**Continuous improvement.** In the business world, Continuous Improvement often denotes a specific model of organizational development; several interpretations are discussed below. However, since I have no evidence that MiBLSi intentionally follows any particular Continuous Improvement model or principles, I use the phrase *continuous improvement* in this text to mean any type of incremental learning or change with the intentional purpose of improving the initiative over the long term.

## Continuous Improvement

### Continuous Improvement of MTSS coordination

Since ISD-level MTSS coordination is a relatively new function within MiBLSi, and because it is a linchpin role in the success of the District Cohort model, the Core Team engages in actively and intentionally learning about what this work specifically entails and how to best support those doing it. A Core Team member captured and expressed the importance of this endeavor in a memo to the entire MiBLSi staff: “We all know that MTSS coordinators support work that cuts across all units of our project. So, our collected vested interest in making sure the coordinators are prepared and well-versed to perform their job well is critical!”

The tension between the ostensive and performative representations of practice motivates MiBLSi to engage in continuous improvement vis-à-vis MTSS coordination. The acknowledgment of this discord between the vision and the current reality is exemplified in this Core Team member’s rationale for collecting feedback:

Because this is a new role that we’re trying to strengthen and we’re relatively new into the process...our ability to say, ‘this is what MTSS coordinators need’ or ‘here’s how they’re supported’ is in some cases pie-in-the-sky, compared to what they actually may have time to do, given their existing responsibilities. We need feedback to make sure that we’re hitting the sweet spot.

Another Core Team member spoke to me about the importance of using feedback from the field to improve the project, seasoning their comments with a hint of frustration about the constant changes that occur within the continuous growth process:

The only way for us to do our work is to continually hear from those that are implementing, hear from those who are in the roles, and find out how we can better support them in doing the work.... It is a little difficult at times because it means that...you can never put a stamp on a power point or say ‘that’s how Year One looks,’ because we’re going to constantly take the feedback and change things as we go.

This commentary describes the ongoing attempt to neutralize creative tension by shifting the ostensive representation – the vision – closer to the performative representation –

the reality – and vice-versa, until the right balance is achieved. Given that the current reality for MTSS coordinators is perpetually evolving, the creative tension may never achieve a permanent resolution. Sterman (1994) articulates the challenge of this endeavor, saying that “Learning about complex systems when you also live in them is difficult. We are all passengers on an aircraft we not only fly but redesign in flight” (p.292).

In the end, MiBLSi’s objective for engaging in an ongoing cycle of collecting, processing, and applying feedback about MTSS coordination is to improve the guidance that the project provides for people who inhabit this role. A Core Team member described the benefits of using continuous improvement to increase efficiency and effectiveness:

The first time we support a MTSS coordinator it’s difficult, but then we should find efficiencies and find easier ways to do this so now...our work with them should actually be quicker and more efficient than it was [with earlier cohorts]. We should be able to get them to the same place faster...We should use the feedback to help out what wasn’t needed and emphasize further what people found really helpful.

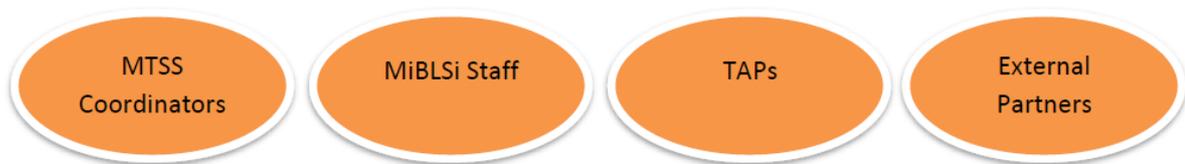
### **Collecting Feedback about MTSS Coordination**

Gathering information about the state of the organization is a critical element in resolving creative tension. When informing positive organizational change through creative tension, “An accurate picture of current reality is just as important as a compelling picture of a desired future” (Senge, 2001, p. 77). In the interest of forming an accurate understanding of the current realities of the role, MiBLSi gathers information about the functions, competencies, and guidance of the MTSS coordinators through a number of avenues.

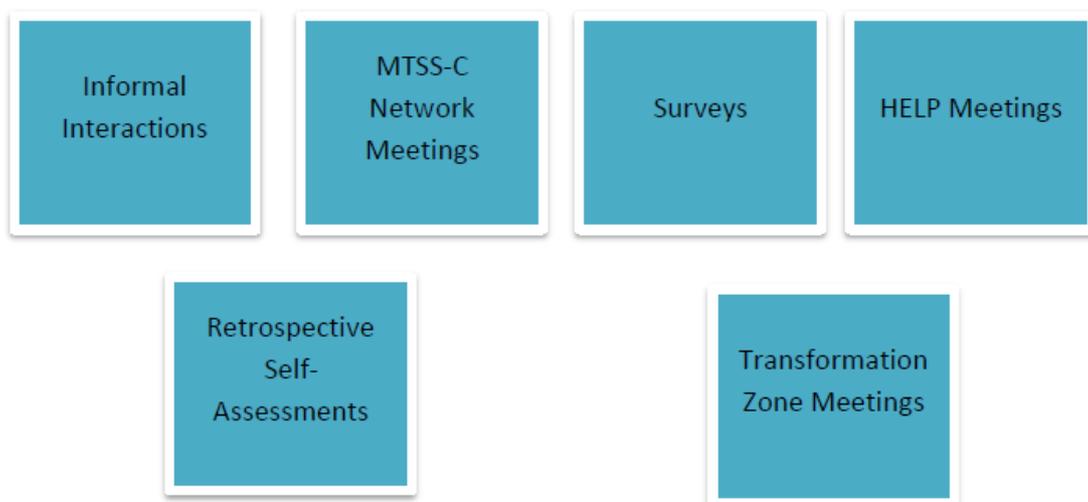
MiBLSi’s proactive stance toward collecting feedback to inform systemic growth indicates its engagement in double-loop deuterolearning (Argyris & Schon, 1978). The Core Team actively seeks feedback from MTSS coordinators, TAPs, and external partners (See Figure 6.1: Sources of Feedback). They collect it formally via surveys and planned, structured conversations and informally through spontaneous individual communication and observations of the work (See Figure 6.2: Mechanisms for Collecting Feedback). Feedback

from multiple sources allows the data to be triangulated, increasing the likelihood that the conclusions made based on the input are accurate and that the ensuing organizational learning is productive.

**Figure 6.1: Sources of Feedback**



**Figure 6.2: Mechanisms for Collecting Feedback**



### **MTSS Coordinators**

MiBLSi collects feedback from MTSS coordinators via multiple methods. Much of the feedback is gathered through informal contact, such as individual conversations or emails; sometimes, it is collected through more formal processes such as surveys or structured conversations during MTSS Coordinator Network Meetings.

**Informal feedback.** MTSS coordinators share feedback both intentionally and unintentionally through informal conversations and correspondence. They are in regular communication with their TAPs, who convey concerns, questions, and celebrations to the

MiBLSi Core Team. Said one Core Team member, “Some of [the feedback] has been informal conversation between MTSS coordinators and our Technical Assistance Partners, about how things are going, and then the feedback comes back through our Technical Assistance Unit.”

Less frequently, MTSS coordinators contact Core Team members directly with feedback or inquiries. One Core Team member shared an example of this direct feedback that addressed using the online modules with the DIT:

I had one MTSS coordinator email me...this week and say...that [they] knew [their] district was moving forward with schoolwide positive behavior supports. [The MTSS coordinator] gave them the assignment...to watch the online module at school. [The coordinator] said they all did it. It was the perfect message, right at the right moment of what they needed. I thought, ‘This is great.’

In some situations, Core Team members have approached individual MTSS coordinators for feedback. One Core Team member offered an example of this one-on-one feedback exchange with a coordinator:

We have a mock-up of what a MiBLSi support plan might look like, and we put it in front of [a coordinator] and said, ‘If we created something like this, would it be helpful? What feedback do you have?’ [The coordinator] had some really good feedback.

This Core Team member then described the goal to expand this type of feedback conversation to include additional coordinators.

MiBLSi staff members, including TAPs and Core Team members, also have the opportunity to observe MTSS coordinators in practice with District Implementation Teams and other implementers and in professional conversation during meetings and trainings.

When talking about the rewarding aspects of working with MTSS coordinators, one Core Team member mentioned this type of feedback by sharing,

I think just hearing the depth of conversations that are happening and the MTSS coordinators are engaging in with people around, ‘How do we do this the right way, and how do we really think strategically about supporting...’ whatever it is that they’re talking about at that moment.

While the MTSS coordinators may not intend to be offering feedback in this type of situation, the observers are able to analyze the practice or conversation and include it in the data they process for continuous improvement.

One challenge in gathering informal feedback is that it is often indirect, filtering through the MTSS Coordinator Network, the TAPs, and/or possibly other ISD or MiBLSi staff before arriving at the Core Team. This means that the information that reaches the Core Team may have been altered since its origin. The Core Team refers to this phenomenon as a “dangerous game of telephone,” a reference to the party game in which players attempt to accurately pass a message by whispering it one-by-one through a group; the original message is almost always distorted across its multiple transfers. While misinterpretation lends humor to the game, it can be problematic in organizational learning because the feedback loses reliability with each translation.

However, one Core Team member pointed out the silver lining of receiving feedback in this way, in that as the message is filtered across iterations, trivial issues are lost and what is truly important rises to the surface:

The one benefit of the telephone game is that the ones that you end up really hearing about were the most important ones, so you do get the big stuff. . . If someone just wrote everything down, it might be hard later to figure out. It all might seem really important. But through the conversations what ends up really getting to MiBLSi is the stuff that was essential.

This perspective suggests that receiving feedback on only the more important issues can help the Core Team streamline the process of analyzing and acting upon the informal input it receives from the coordinators.

**MTSS Coordinator Network meetings.** During the regularly-scheduled MTSS Coordinator Network Meetings, there are numerous opportunities for MiBLSi to gather feedback from the coordinators. Most frequently, this feedback is in the form of comments in a chat box during the Adobe Connect calls. In this situation, the meeting’s facilitator poses a

question to the group and opens a shared text box in which all participants are able to enter questions or comments. Most of these chat box conversations are part of preplanned activities during the call; sometimes the presenter posts them off-the-cuff.

The questions posed for these conversations have included topics for direct feedback about the MTSS coordinator function, such as

Look over the list of key features [Critical Components] of MTSS coordination as well as the definitions of each piece of work

- Does this capture the work that you do to coordinate MTSS work?
- Is there a key feature that is not captured here?
- What of this work is going well for you, what is a struggle?

Other questions hit upon other relevant topics in the interest of mutual support across the MTSS Coordinator Network, for example:

- From your experience with Phase Meetings: What has gone well?
- What resource support would be beneficial from MiBLSi and/or your [MTSS coordinator] colleagues?
- What have you done to help engage those that are not strongly contributing to the ISD Implementation Team?

The Core Team member who typically facilitated the Adobe Connect calls in 2013-2014 explained the inclusion of feedback questions into the calls, saying,

There's been a variety of times when I've asked some feedback questions. Maybe it's when I'm feeling a little bit like I'm not exactly sure where to go next, or exactly how to support, I've, at the end of our calls, thrown in a survey for folks to reply to and talk about what their needs are.

The text from the chat box conversations is archived and available for later processing by the Core Team.

**MTSS coordinator surveys.** On occasion, MiBLSi has conducted formal surveys of the MTSS coordinators. Notably, in the fall of 2014, the MTSS Coordinator Network Core Planning Team (Planning Team) decided to use the information gained through my dissertation study to build a survey for the statewide MTSS Coordinator Network. The motivation behind this survey was to determine if my findings regarding the three MTSS

coordinators in this study were representative of the group as a whole before recrafting the role specifications and the support system.

Commissioned by the Planning Team to carry out this survey, I drew on the protocols from my MTSS coordinator interviews to develop the line of questioning. I distributed, collected, and analyzed the survey using online software called Survey Gizmo, for which MiBLSi sponsored training for me and for several members of its staff. In this investigation, we asked the MTSS coordinators to identify their roles, responsibilities, and time allocation within the ISD. We also asked them to rate their levels of preparedness and prioritization of the Critical Components of the Practice Profile, as well as the helpfulness of the various modes of guidance MiBLSi offers for their work.

***MTSS Coordinator Survey Findings.*** The fall 2014 survey of MTSS coordinators was conducted with the sole purpose of providing feedback to MiBLSi to inform the role design and the guidance for coordinators (For full output, see Appendix F: Fall 2014 MTSS Coordinator Survey Results). With 19 of the 23 MTSS coordinators responding, the data set was too small to analyze using rigorous quantitative methods and the findings are not generalizable beyond the population of participants. In addition, all of the data gathered in this survey are self-reported and thus have the potential for bias. Regardless of its limitations, however, the MTSS coordinator survey offers several useful observations and allows for some claims to be made regarding MTSS coordination within MiBLSi. These assertions reinforce the findings from the interviews I conducted with the three MTSS coordinators in this dissertation study, as reported in Chapter V.

*Professional roles.* Most of the current MTSS coordinators have roles other than this one and those roles vary; there is no consistent pairing of the MTSS coordinator role with any particular other role. The most common paired functions, with four responses each, are ISD administrator, instructional consultant, and behavior specialist. With three respondents

each, the next tier of paired roles include school psychologist and MTSS coordinator for non-MiBLSi partnering districts; three coordinators also answered “none,” which can be interpreted as a full-time MiBLSi MTSS coordinator designation.

*Time allocation and use.* According to this survey, the amount of time MTSS coordinators have allocated to this work varies widely. For some, the ISD has provided all or most of the coordinator’s full-time equivalency (FTE) to this function; on the other hand, many have no FTE for MTSS coordination and are expected to find spare time in which to complete this work. In fact, an equal percentage of MTSS coordinators (16%) reported having all of their FTE devoted to this role as having none.

On average, MTSS coordinators spend approximately the amount of time allocated by their ISDs on this function. However, since the FTE allotted for MTSS coordination varies, so does the time spent engaging in it, with a median range of about 10 to 20 hours per week. Those with no FTE allocated to MTSS coordination are clearly working beyond their allotment; some others are working below it.

Across cohorts, MTSS coordinators consistently devote the greatest percentage of their time to planning and facilitating meetings and trainings. On average, MTSS coordinators spend greater than five hours per week planning logistics for these meetings. Breaking the data down by cohort, there is some divergence in how time is spent: newer MTSS coordinators spend more of their time – as much as 16-20 hours per week - deepening their own knowledge about MTSS and implementation science, whereas those with at least two years of experience spend no time on this component, instead focusing on planning and facilitating meetings and trainings.

*Preparedness.* Among the whole sample, MTSS coordinators consistently reported feeling the least prepared to develop and support local coaching capacity and local training capacity, from among the Critical Components of the Practice Profile. These are the only two

Critical Components where any MTSS coordinators categorized themselves as “completely unprepared.” Conversely, the majority of the coordinators reported feeling “well-prepared” or “highly prepared” in all of the other Critical Components. Across cohorts, coordinators reported feeling the most consistently well-prepared for effective communication.

*Importance of Critical Components.* Throughout the sample, while the MTSS coordinators rated all Critical Components, on average, either “very important” or “critically important,” they consistently reported that those most important to their own work are effective communication and guide problem-solving through data based decision making. The only Critical Components to have any ratings below “very important” were develop and support local coaching capacity and local training capacity, the same ones for which they feel least prepared to enact.

*Supports.* In this survey, none of the supports that MiBLSi offers to MTSS coordinators were rated as “not at all helpful” by more than one respondent. The most consistent “extremely helpful” ratings came for the MiBLSi website, special conference opportunities, and MiBLSi-provided books and other resources, all of which fall under the domain of knowledge-building, and the TAP. Although most of the responses regarding supports were consistent across cohorts, MTSS Coordinator Network meetings (both Adobe Connect and face-to-face) were reported as more helpful by newer coordinators – those in their first two years in the role - than by more experienced coordinators.

*Additional comments.* In addition to responding to the selected choice questions posed in the survey, MTSS coordinators were invited to offer additional feedback as to how MiBLSi could improve support for their work. The comments varied, with several falling under the following themes: increasing MiBLSi contact with ISD administrators, the importance of the TAP as a professional resource, differentiating the coordination function based on ISD and district needs, differentiating support to MTSS coordinators based on their

other functions and the stages of implementation of the partner districts, and concern over the capacity to add new district partners.

**Consumer feedback survey.** MiBLSi also conducts an annual consumer feedback survey that is distributed to a broad array of stakeholders, including MTSS coordinators. Through this online survey, according to a Core Team member, MTSS coordinators are invited to “rate the quality of the supports they are provided and to provide feedback on what they want more of.” The results of this survey were not available to me for analysis.

**Retrospective self-assessments.** One of MiBLSi’s regular sources of feedback is a retrospective self-assessment conducted at the end of each face-to-face training session. Self-assessments are often used in professional development settings in place of more expensive and time-consuming objective measures, such as external observations or measured performance outcomes (Hartman & Nelson, 1992; Hewson, Copeland, & Fishleder, 2001; Skeff, Stratos, & Bergen, 1992). Hartman and Nelson (1992, p.525) explained the common rationale for using retrospective self-assessments, saying that “Although the validity of self-reporting as a means to study teaching has been questioned for some time, its use remains ubiquitous. The reasons for this are obvious: it is quick, simple, and inexpensive.”

Empirical studies on retrospective self-assessments have provided conflicting results, thus their validity remains in question. On the one hand, Hewson, Copeland, and Fishleder (2001) found that retrospective self-assessments are effective in determining the appropriateness of training content, and are valid both on their own and in conjunction with other measures. Skeff, Stratos, and Bergen (1992) discovered that retrospective pre/post self-assessments aligned more closely with external ratings than traditional pre/post self-assessments, given constant standards and a common metric. On the other hand, Hartman and Nelson’s (1992) study revealed a poor correlation between self-assessment and

performance, casting doubt on the validity of self-reported learning and bolstering the case for objective data and external evaluation.

MiBLSi has determined that the pros outweigh the cons, as the project has found value in using retrospective self-assessments to gauge the usefulness of training content. According to three of the Core Team members I interviewed, these self-assessments have been an integral part of MiBLSi's data collection for some time. For example, one Core Team member described the purpose, scope, and process of the retrospective self-assessments:

Across any training we do, including the MTSS coordinator face-to-face days, at the end of the day we collect feedback through our little responders, where we ask people about the day, whether or not the day helped them move forward in their understanding of MTSS, move forward in their understanding of the type of content we're doing, whether or not they were able to leave with a good action plan of what to do next. We were able to use that information to determine if that training was going well.

The others echoed this depiction, noting that this is a constant and longstanding element of the project's feedback process, with the purpose of understanding how well the training content meets participants' goals. What was not made clear in these depictions, however, was who within the project is responsible for gathering, analyzing, and reporting the findings from these self-assessments.

To submit this end-of-day evaluation, session participants use handheld responders to share their feedback, using a scale of 1 (Strongly Disagree) to 4 (Strongly Agree) to rate a series of statements. The prompts posed at the end of the March 2014 MTSS Coordinator Network Meeting are representative of the type of feedback typically sought through these polls:

- Today's learning was a valuable use of my time.
- Time provided gave me opportunity for collaboration with other MTSS coordinators.
- Topics were meaningful areas for collaboration.
- Next steps/action plans that were developed could meaningfully support my work.

- Problem of Practice structure was a good format for collaboration.
- I would attend a meeting again that has collaborative structure for other MTSS coordinators.

These prompts are broad and general, allowing MiBLSi to take the pulse of the group with regard to their satisfaction with the training session or meeting. Participants are invited to supplement this feedback with more detailed written comments on paper forms.

### **Technical Assistance Partners**

Since they are in continual contact with the MTSS coordinators, TAPs are important sources of information both from and about them. The Core Team recognizes and draws on this relationship, with one of them articulating that

Sometimes the feedback about what the supports that are needed for MTSS coordinators may not even directly come from MTSS coordinators. It, in many cases, comes from TAPs, who are really in the process...I mean they're in the trenches, seeing if the support we're providing really is translating into action.

The TAPs' feedback to the Core Team comes both formally through Transformation Zone meetings and surveys, and informally through individual conversations and emails. While I was not privy to the informal individual interactions between TAPs and Core Team members, I did have the opportunity to participate in the collection and analysis of the TAP survey data, and I observed several Transformation Zone meetings.

**TAP surveys.** As a follow-up to the MTSS coordinator survey, the Planning Team created and distributed a survey for the TAPs in the fall of 2014, again using Survey Gizmo. We asked the TAPs to offer their perspectives on similar questions regarding the coordinators. In these surveys, the TAPs identified the MTSS coordinators' roles and responsibilities within the ISDs and described the content and frequency of their support to the coordinators. We then had them rate the coordinators' levels of preparedness for and prioritization of the Critical Components of the Practice Profile. As the MTSS coordinator survey was a follow-up to my dissertation interviews, the TAP survey provided yet more

evidence to triangulate the findings about how MTSS coordinators interpret and enact their role (See Appendix G: Fall 2014 TAP Survey Report).

***TAP Survey Findings.*** Through the TAP survey, the Planning Team aimed to solidify the findings from the MTSS coordinator survey and to learn more about the TAPs' guidance and support of the coordinators. All eleven TAPs participated in the survey; therefore, as with the MTSS coordinator survey, the sample size is too small to carry any statistical power and the findings are purely informational and applicable only to the participant population.

***Frequency and nature of support.*** In this survey we learned that the average TAP directly supports two MTSS coordinators, but that each TAP might work with as few as one and as many as five coordinators. Supporting the findings in the MTSS coordinator survey and the dissertation study, this survey found that TAPs are a frequent source of guidance for the coordinators. In this survey, TAPs reported that 83% of the MTSS coordinators seek their support at least once per week and that 46% contact the TAPs "a few times per week." According to the TAPs, they provide the majority of guidance to the coordinators by co-planning content for meetings, co-planning content for training sessions, and co-facilitating training sessions. These data support the findings of the MTSS coordinator survey, given that these are the areas in which the MTSS coordinators, on the whole, reported spending most of their time.

***MTSS coordinator professional roles.*** The TAP survey data support the previous findings that most MTSS coordinators have roles in the ISD other than this one and that those additional roles vary, with no consistent pairing with any particular role. Among those responding, the TAP survey also corroborates the findings that MTSS coordinators, on average, have little-to-no time allocated to this function and that there is great disparity in how much time the ISDs provide for MTSS Coordination. About 25% of the TAPs reported

being uncertain as to how much time their partnering MTSS coordinators have been allotted by their ISDs for this role.

*MTSS coordinator preparedness.* Supporting the MTSS coordinator survey findings and the interview data, TAPs assess the MTSS coordinators as least prepared in the components associated with developing and supporting coaching and training capacity. The TAPs rated the MTSS coordinators' general preparedness lower, on average, than the MTSS coordinators did, with the majority of the ratings in the "Somewhat Prepared" or "Well-Prepared" categories for all Critical Components.

Supporting and extending the MTSS coordinator survey findings, the TAPs assessed the MTSS coordinators as most highly prepared for the effective communication and organize, coordinate, and co-facilitate the work of the ISD and District Implementation Teams Critical Components. These data also support the interview and observational data from the dissertation case study.

*Importance of Critical Components.* When asked to rate the relevance of each Critical Component from the MTSS coordinator practice profile, the TAPs both supported and extended the findings from the MTSS coordinator survey and the case study interview data. Like the MTSS coordinators, the TAPs reported that the most important Critical Components to the MTSS coordinators' work are effective communication and guide problem-solving through data based decision making. In addition, they gave the same weight to the organize, coordinate, and co-facilitate the work of the ISD and District Implementation Team component. Like the coordinators in the prior survey and the interviews, the TAPs did not assign any of the Critical Components a rating of "Not at all important" to the coordinators' work. The least important components of MTSS Coordination, as assessed by the TAPs, are those connected to developing and supporting local coaching and training capacity; this finding coincides with all of the previous data.

**Transformation Zone meetings.** On a monthly basis, a group of TAPs and the MiBLSi Core Team meet, typically via Adobe Connect, to discuss the progress of MTSS implementation for the newest cohort of districts. During these meetings, the group discusses the success of the MTSS coordinators in facilitating the work of the District Implementation Teams (DIT). Much of the conversation during the Transformation Zone meetings is focused on the DITs' task completion, work that is facilitated by the MTSS coordinators and recorded using MiBLSi-designed checklists. During the meetings that MTSS coordinators facilitate, the DIT members use the checklists to self-report the steps of implementation that they've completed. The TAPs share these data with the Core Team during Transformation Zone meetings, with the primary purpose of monitoring local implementation progress and with the secondary purpose of assessing the MTSS coordinators' effectiveness in encouraging that work.

Sometimes the feedback shared in the Transformation Zone meetings about MTSS coordinators is general. For example, when a TAP talked about their ISDs being stuck in preparatory conversations, the point was made that, "This is the big area that everyone struggles with – communication. Access to who they need to talk to between sessions is what's hardest." On other occasions, the TAPs share concerns about individual coordinators. One TAP sought advice for dealing with a less-than-effective coordinator, saying,

I'm concerned about the skill level of the MTSS coordinator and I'm hearing about it from others. What I'm wrestling with is how to support [this MTSS coordinator] when [they] get to training. I don't think I can expect [them] to successfully run the DIT meetings.

This TAP elaborated that the MTSS coordinator's lack of organization, technical skills, and sense of urgency was impacting the work of the team, and that there is another DIT member who would be better suited as a coordinator. At each Transformation Zone meeting throughout the study year, this TAP updated the group on the progress and status of this

MTSS coordinator and asked for guidance as to how to continue helping them fulfill this role.

### **MiBLSi Staff**

During the summer of 2014, the Core Team sent informal, open-ended surveys to the entire MiBLSi staff, including members of all units, seeking feedback from a variety of internal angles for proposed changes to MTSS coordinator support. The survey, presented in the form of an emailed PowerPoint slideshow, posed the following queries, framed as “Questions to Answer Overtime [sic]”:

- What are the skillsets needed for MTSS coordinator success?
- Is our focus on the “function” of MTSS coordination enough for ensuring there is an individual assigned within the organizational structure to perform this role?
- How do we know if the coordinator role / function is successful?
- What conditions need to exist that allow for MTSS coordinators to be successful?
- How does the success vary based on size, experience, perceived purpose and resources of the ISD?

The task presented to the staff was to consider these questions and respond via email with their thoughts regarding the value of creating a statewide system of support for MTSS coordination, along with specific comments, suggestions, or questions on the topic. The responses were gathered and analyzed by the Core Team member who prepared and sent the survey.

### **External Partners**

MiBLSi solicits feedback about various aspects of the project from external partners, in particular graduate students and faculty researchers from universities, through their Higher Education Learning Partnership (HELP). I observed interactions between three HELP partners, myself included, and the MiBLSi Core Team. MiBLSi has also engaged the contracted services of an external evaluator from an out-of-state university to assess and inform the development of the project.

One of the HELP partners described their function in MiBLSi as researching and reporting “in-the-moment” and on a continual basis, rather than historically. They spoke of the evaluators and consultants as being “stitched into the fabric” of MiBLSi’s continuous improvement work, blurring the line between external partner and inside resource. My role as a HELP partner was particularly embedded within MiBLSi, as I was also a member of the MTSS Coordinator Network Core Planning Team and Pit Crew. This position afforded me regular opportunities to give both voluntary and solicited feedback to the project based on my research.

At times, the MiBLSi Core Team has asked very specific questions regarding the feedback they seek from external partners. For example, one Core Team member posed the following questions, among others, in an email to me:

- What have you learned in your study in regards to supports necessary for coordinators?
- Coordinators wear so many hats. Is there a way for us to more clearly define the hat of a coordinator and by doing so develop a scope and sequence to address needs?

Another Core Team member, joining the same email exchange, asked several questions including,

- How do we know if a MTSS coordinator is successful?
- What are the skillsets needed for MTSS coordinator success?

On other occasions, such as a meeting set up for HELP partners to share their findings and recommendations, the Core Team has invited the external partners to use our findings to drive the conversation.

### **Processing Feedback about MTSS Coordination**

Writing about the role of processing feedback in his review of research on learning in and about complex systems, Sterman (1994) states that

All learning depends on feedback. We make decisions that alter the real world; we receive information feedback about the real world, and using the new information, we

revise our understanding of the world and the decisions we make to bring the state of the system closer to our goals (p.292).

Deliberate processing and analysis translate feedback into these revised understandings and allow organizational learning to occur (Argyris & Schon, 1978; Senge, 2001; Sterman, 1994).

MiBLSi aims to inform the reconciliation of the creative tension between ostensive and performative representations of MTSS coordination. That is, the objective of MiBLSi's continuous improvement process is organizational growth in the form of bringing the design for practice and the practice itself into alignment. However, while MiBLSi employs several mechanisms for making sense and good use of the feedback it compiles, these mechanisms do not function as a cohesive system (See Figure 6.3: Mechanisms for Processing Feedback).

**Figure 6.3: Mechanisms for Processing Feedback**



### **Lack of System for Processing Feedback**

To date, MiBLSi does not have an articulated or structured system for processing feedback; rather there are many ways in which a variety of parties engage with the feedback once it has been gathered (See Figure 6.4: Pathways for Processing Feedback). One Core Team member described a synthesis of multiple feedback loops through which the project processes input from multiple informants in an effort to come “closer to the mark we want it

to.” Stated more simply, but with more ambiguity, another Core Team member observed that the project processes feedback “a variety of different ways, depending on the feedback,” then went on to offer an illustration: “There’s some pieces from MTSS coordinators or from other...consumers that may just be something that Technical Assistance Partners need to know about and need to address. So it may be something that we address at a TAP meeting.” This respondent went on to describe “concentric circles” of feedback: small, immediate feedback loops, such as information from one TAP that is passed directly on to others, working in conjunction within the larger loops that move toward organizational improvement.

What is not clear from the above example is who determines the appropriate venue in which to address each set of feedback. A Core Team member conveyed this challenge as

...trying to match the concern to who can help to deal with it. Is it something that we need to take to the Evaluation Unit? Is there more data that’s needed? Or is it something that we need to take to the Professional Learning Unit because there’s something in content that needs to be beefed up or added in?

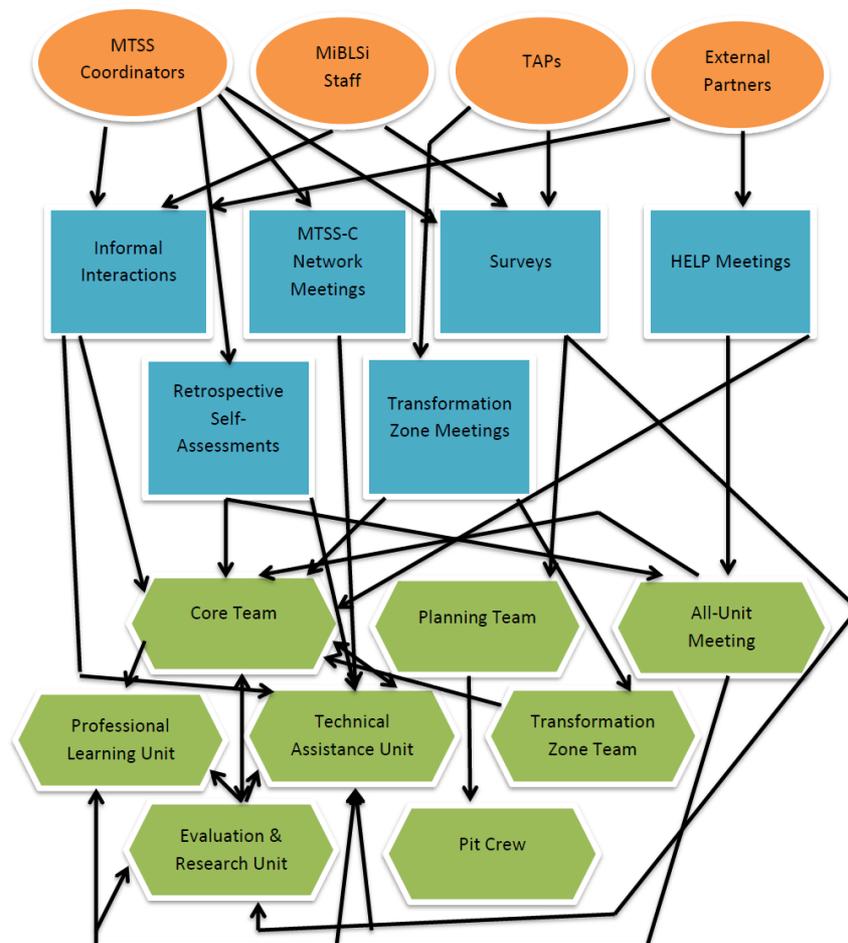
The project’s lack of a consistent gatekeeper who directs all feedback to its appropriate team for processing could result in important information being lost in the shuffle.

With regard to feedback specifically collected from MTSS coordinators, the two Core Team members who work most closely with the MTSS Coordinator Network described improvements to the feedback loop. Said one of them, “This is the first year that I think we’ve had a good enough feedback loop with MTSS coordinators...to really try to think about what we want to do to move the work forward...” However, this respondent admitted that this progress has not been without limitations, continuing, “I think, given the nature of the speed with which our project has been progressing, I sometimes feel like we react to needs, as opposed to be planful and very systematic.” Another offered some details on addressing MTSS coordinator feedback, self-identifying as the gatekeeper:

I would say, the majority of the time, I'm the first gate... If I have a very clear path for how to deal with that, I may just go and deal with it... There's other times where I feel like if it needs to go further and I'm not exactly sure what to do with it, often my next step is to talk with [another Core Team member]... so I can check with [them] and say, 'Can I take this right to [Evaluation and Research Unit]? Can I take this right to [Professional Learning Unit]? Should we deal with this as an entire program team? What should we do with this concern?' So often that would be the next step, is to take something I can't see a clear path about how to problem solve to [them] to generate ideas, brainstorm, and figure out where would be the best place to do that, and to help figure out if it's a priority.

The process as it is described here, while it includes some routines enacted by this individual, does not represent a consistent project-wide system for handling incoming feedback. Rather, it characterizes an unstructured way in which a key individual assesses feedback collected from a particular source, and then attempts to funnel it to the appropriate parties for decision-making and action.

**Figure 6.4: Pathways for Processing Feedback**



## **MTSS Coordinator Network Core Planning Team**

During the fall of 2014, MiBLSi formed the MTSS Coordinator Network Core Planning Team (Planning Team). Active for only a few months, I participated in this group along with representatives from each of MiBLSi's administrative units (Evaluation and Research, Professional Learning, Technical Assistance, and Fiscal). The Planning Team's stated purpose was to set the vision for MTSS Coordination, engage in short term and long term planning for MTSS coordinator support, create evaluation components, and maintain a budget. The Planning Team used data from my dissertation research, input from other external partners, information from the MTSS coordinator surveys, feedback solicited from MiBLSi staff, and observations of MTSS coordinators in the field to develop a plan for what a team member called, "an opportunity to reshape our MTSS coordinator support structure."

The data from the staff survey conducted in the summer of 2014 about the MTSS coordinator support proposal were collected, analyzed, and reported by one Core Team member. This individual, who had also composed the survey, communicated the findings and their response to the findings back to the staff in the fall. Armed with this input, the Planning Team began its work to improve upon the guidance provided to MTSS coordinators.

To initiate the Planning Team's work, I conducted a brief survey of the Planning Team members to determine the group's priorities. Using the findings from that survey, we identified four key tasks for ourselves: (1) develop supports and materials for MTSS coordinators; (2) differentiate those supports for different groups of coordinators; (3) build a scope and sequence for the supports; (4) build the MTSS Coordinator Network's capacity to carry out their work independently. With this lens, I crafted two surveys, grounded in this dissertation study: one for the MTSS coordinators and one for the TAPs, to gather each group's perception of the functions, competencies, and guidance of MTSS coordination. I collected and analyzed the data from these surveys, then reported the summary outcomes to

the Planning Team. The Planning Team discussed the findings, balancing them with input from external partners and their own experiences with MTSS coordinators and the implementation process, with the aim of creating short- and long-term visions for supporting coordinators.

The Planning Team meetings were targeted toward defining MTSS Coordination and designing a system of supports around that definition. Through collaborative conversations that often included collective brainstorming and interactive critiquing of ideas, the early discussions involved identifying MTSS coordinator priorities and needs, addressing budgetary concerns related to MTSS coordinator training, delineating the responsibilities of the team members, and sketching out the underlying structure for what would become the Three Domains Framework. Over the course of four meetings, the team fine-tuned and named the Three Domains Framework, reconciled it with the survey feedback from the MTSS coordinators, then handed it over to the Pit Crew to communicate to the coordinators at the March 2015 MTSS Coordinator Network face-to-face meeting. At this juncture, with the framework for support in place, the Planning Team disbanded.

In addition to creating the Three Domains Framework, the Planning Team refined and revised some of the material resources for MTSS coordinators. We also began with the intent to craft an updated Practice Profile, a self-assessment tool, and other similar materials based on our redefinition of the role, but these projects were abandoned by the end of the Planning Team's short tenure; it remains to be seen whether, and by whom, these products will be created.

### **MTSS Coordinator Network Pit Crew**

Once the Planning Team established a vision, it passed its big ideas to the MTSS Coordinator Network Pit Crew (Pit Crew), which consisted of two Planning Team members (including me) and three additional MiBLSi staff members. The function of the Pit Crew was

to create and deliver the content for each MTSS Coordinator Network Meeting, based on the Planning Team's vision.

### **Transformation Zone Meetings**

The stated purpose of the Transformation Zone team, which consists of Core Team members and TAPs, is “to ensure that students in the region are achieving successful outcomes.” The Transformation Zone team addresses a set of fixed questions during each meeting, to keep the focus on systematically sharing and processing feedback. These questions center on whether and how MiBLSi's work is having a positive effect on the local districts, what problems or action items need attention, and whether the Transformation Zone team followed through on action items from the previous meeting. During these meetings, much of the conversation centers on the work of the DIT, which is facilitated by the MTSS coordinator.

Specific to the MTSS coordinator role, the Transformation Zone team talks about the effectiveness of the MTSS coordinators in working with the DIT. For example, one participant at a Transformation Zone meeting mentioned that it's an early indicator of MTSS coordination issues if the team isn't coming together to get the work done. The group discussed what additional support could be provided by MiBLSi if the team structure is not successful. One participant suggested selecting and video-recording a coordinator who is effective at facilitating the DIT work, to use as an exemplar of practice. At another Transformation Zone meeting, the suggestion was made that the team revisit the Practice Profile and identify areas of concern, about MTSS coordinators, now that MiBLSi knows more about what they do in practice.

### **Core Team, Project Unit, and All-Unit Meetings**

Formal feedback about MTSS coordination, as well as other aspects of MiBLSi, is processed during meetings of the various administrative teams within the project. These

teams include the Core Team and each of the project units (Evaluation and Research, Professional Learning, Technical Assistance, and Finance). Each unit addresses the feedback as it pertains to its particular function, then shares findings with the other units. One venue for doing this is at the All-Unit meetings, which involve the whole staff and occur on about a bimonthly basis. Sometimes, according to Core Team members, the feedback raises issues too large for the individual units to handle independently, so the unit coordinators bring it up to the Core Team meetings for processing and action. As I was not included in these meetings, my reporting is grounded in commentary made to me by Core Team members.

The All-Unit meeting is also a setting for processing data as a whole group. One Core Team member who is also a unit coordinator describes how the units conduct both collective and parallel data analyses, sharing their interpretations and implications with each other.

We had our All-Unit staff meeting in the beginning of June, and we looked at some of our data there. Then within [my unit] we took the written feedback from the trainings, the feedback from the consumer survey...and went through that and looked for themes and implications for content for our unit. I know that it was on the agenda for [the other units] to do the same thing, to go through the feedback and look for those themes and talk about implications. And then in the last week I've seen, as we were giving feedback to each other on new content that we're working on this summer, references back to 'Here's the feedback we've heard from our consumers. Keep that in mind when you're creating.'

In the case of the large, broad annual surveys distributed to stakeholders and consumers, the Evaluation and Research Unit collects the data and codes it by theme to guide the other units in their analysis. For example, the Professional Learning Unit focuses on themes that involve content development and training supports, whereas the Technical Assistance Unit will look for input pertaining to supporting MTSS coordination and local implementation.

### **Applying Feedback about MTSS Coordination**

Now that I have outlined the myriad sources from which MiBLSi collects feedback about MTSS coordination along with the complex web of mechanisms through which it

processes this feedback, it will be enlightening to investigate what the project has learned from all of this input and analysis and to examine what measures have been taken to attend to the issues that have arisen.

Although there were a number of smaller takeaways from all of the feedback MiBLSi gathered about MTSS coordination, two broad findings emerge: the existence of a gap between the expectations for MTSS coordination and the capacity of those carrying it out, and the need for more focused and consistent guidance for effective practice. These findings reflect the overarching goals for improvement as expressed by a Planning Team member: “We want MTSS coordinators to know what to do and know whether they are doing it well and how to get specific supports in doing it better.” In this section, I describe what MiBLSi has learned through feedback and I share how MiBLSi has addressed, or plans to address, these findings. I also make recommendations for future or continued action based on the findings and the direction MiBLSi has taken to attend to them.

### **Alignment between Expectations and Capacity**

Across feedback sources, MiBLSi has found evidence that the MTSS coordinators have been expected to do more than they’re equipped to handle. They have identified a misalignment between the ostensive role design and the actual performative capabilities of the MTSS coordinators. This gap puts the MTSS coordinators in the position of sacrificing the quality and quantity of their work in this role as well as in their other roles within the ISD.

Prior to soliciting formal feedback on this question, Core Team members expressed an awareness of the gap between the ostensive role design and the professional capacity of the MTSS coordinators in their interviews. One of the Core Team members talked about setting the initial expectations for the role and the subsequent observations about the realities of the MTSS coordinators’ competencies:

I think we just assumed there would be people that had this knowledge, or if they didn't have the knowledge, they had some foundation, and then we could build it. But what I'm finding is that there aren't a lot of people that really have this knowledge. We've got people who were selected who didn't have the knowledge. We're asking them to do things right away that we know they are not as prepared to do as we would want them to be...I think they're doing the best that they can.

Supporting this observation, results from the subsequent MTSS coordinator survey show that the newer MTSS coordinators spend the majority of their time deepening their knowledge of MTSS systems and practices and implementation science, whereas the more experienced coordinators focus on applying their knowledge. This serves as evidence that coordinators come into the project with a weaker-than-expected knowledge base, requiring them to use their professional time to catch themselves up, and interfering with their ability to effectively and efficiently conduct their work early in their tenure.

In the Transformation Zone Meetings, TAPs shared that some MTSS coordinators in their regions were not living up to the tasks of the role. In one region, the TAP relayed the frustrations of two MTSS coordinators about the lack of a clear identification of their roles with regard to the District Implementation Team. Specifically, while one of these coordinators was functioning more effectively than the other, they both felt as though the role on paper did not match what they were actually doing with the team. Another TAP shared the concerns over an ISD which has two *de facto* MTSS coordinators, since the one who carries the official title was not demonstrating the expected capacity to lead the team. A third TAP shared that DIT members have complained about the lack of direction from the MTSS coordinator, and that another team member may be better suited for the role.

Across cohorts, the MTSS coordinators expressed feeling consistently ill-prepared to develop and support district-level coaching and training capacity. Supporting these findings, the TAPs assessed the MTSS coordinators as least prepared in the Critical Components associated with developing and supporting local coaching and training capacity. In fact, the

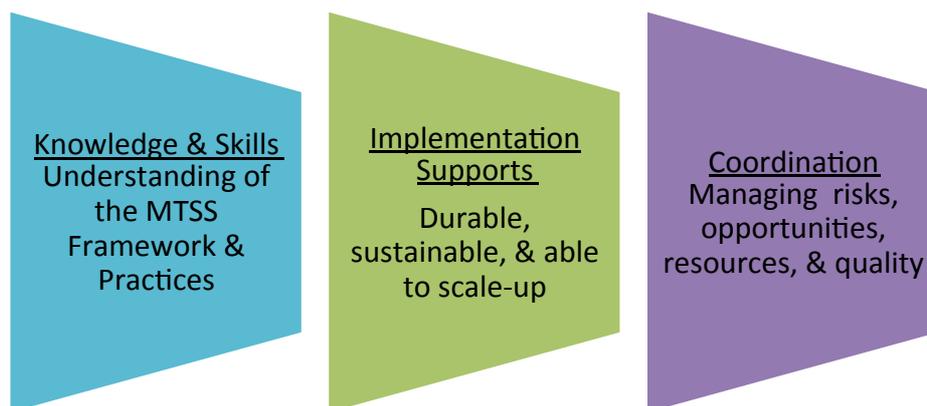
TAPs rated the coordinators' preparedness even lower, on average, than the coordinators did.

The Core Team suggested, in a memo to MiBLSi staff, that

The pieces of the 'Independent Study' prong for developing capacity include books, articles, watching the online modules, etc. All of these things are being done under the guise of building capacity of trainers and go-to people BUT we are also building the capacity of MTSS coordinators in the data, systems, and practices of MTSS! This means we don't have to duplicate efforts using scheduled MTSS coordinator time when we can focus that time on very specific functions unique to coordinators.

**Actions MiBLSi has taken. Three Domains Framework.** The Planning Team made every effort to process the input gathered in the MTSS coordinator and TAP surveys to bring the vision we crafted for MTSS coordination in alignment with the realities of the role. As a result, the Planning Team identified three domains of MTSS coordination and created a framework around them: Knowledge and Skills, Implementation Supports, and Coordination (See Figure 6.5: Three Domains of MTSS Coordination Framework and Figure 6.6: Allocation of the Three Domains). Moving forward, this framework will guide the articulation of the role functions, the determination of essential competencies, and the modes and content of guidance provided by MiBLSi for MTSS coordinators.

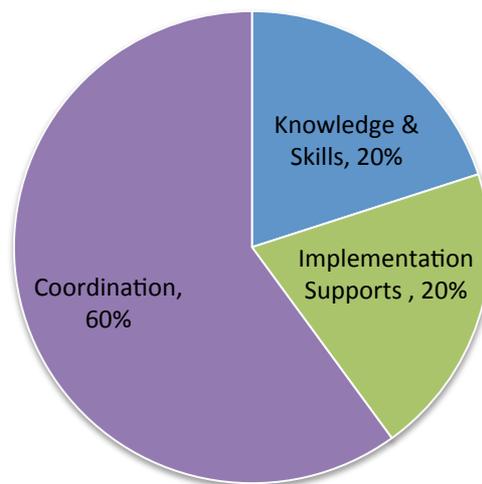
**Figure 6.5: Three Domains of MTSS Coordination Framework**



The Planning Team determined that Knowledge and Skills should comprise about 20% of the MTSS coordination function, and that, in proportion, about 20% of the guidance provided to coordinators will center on this domain. The competencies addressed in this domain include the MTSS framework and practices used in schools to directly impact

student achievement. They include evidence-based reading instruction, schoolwide behavior routines, and data-based decision making. While MTSS coordination does not require deep technical expertise in all of these areas, a working knowledge of the big ideas of these critical features of MTSS and a familiarity with resources are important to success in this function.

**Figure 6.6: Allocation of the Three Domains**



Likewise, about 20% of MTSS coordination function and guidance will be dedicated to implementation supports. Fluency with implementation supports is vital to MTSS coordination. These are the tools and frameworks through which MTSS coordinators assess a district’s readiness and capacity to install MTSS and enhance the efficiency and effectiveness of local implementation. They enable MTSS systems and strategies to be implemented with fidelity and increase the odds of achieving long-term sustainability and durability of the practices in districts and schools.

Since managing the process of local implementation is the central purpose of MTSS coordination, the Coordination domain makes up the remaining 60% of the framework. This component focuses on organizing, coordinating, and co-facilitating the work of the DITs to create the conditions under which local MTSS implementation can occur. It entails

communicating with stakeholders, identifying potential barriers, securing resources, solving problems, and arranging logistics in the interest of assuring that the local implementation process proceeds as smoothly as possible.

The Planning Team unveiled the Three Domains Framework at the March 2015 MTSS Coordinator Network Face-to-Face meeting. The message conveyed in this presentation was framed by the Planning Team as follows:

Using the input you [coordinators] have given us, along with the information we have about what's coming from the state and national levels, along with our now four years of the district cohort model with MTSS coordination work...we are predicting the future and building a support structure accordingly.

We also took the opportunity to remind the coordinators of how far the development of the role specifications and supports had come since the beginning of the project.

The plan moving forward is to use this framework to clarify the expectations for MTSS coordinators and the guidance provided for them. The Core Team wants to be consistent and transparent about the expectation that the coordinators spend the bulk of their time enacting the Coordination function, facilitating the implementation process at the local level, but that they also need to attend to implementation support and knowledge of MTSS practices as needed. The system of supports for the MTSS coordinators will also be designed around this framework and in these proportions.

**Recommendations for MiBLSi.** “What teachers do matters”, but some of those things matter more than others, concluded Hattie (2009, p. 22), using the effect sizes calculated in his extensive meta-analysis on the effects of instructional practices on student learning. Likewise, it can be said that what MTSS coordinators do matters, and that some of their practices matter more than others. The identification and codification of effective coordination practices is important, then, in order for them to be effective in facilitating local MTSS implementation. As Hattie described regarding teaching, we need to establish a

barometer of what works, then use that barometer to establish guidelines for excellence (Hattie, 2009).

Furthermore, *role ambiguity*, or “the uncertainty or ambiguity about how to carry out the work role” (Abramis, 1994, p. 1412) has been found to have a moderate (Abramis, 1994) to significant (Behrman & Perreault, 1984) negative correlation with job performance. Extending these findings, Tubre & Collins (2000) found in their meta-analysis that not only does role ambiguity have a negative relationship with job performance in general, but that this relationship becomes more profound as job complexity increases. Since MTSS coordination is highly complex work, we can infer that role clarity would be a key factor in maximizing the efficacy of the MTSS coordinators.

Given the feedback that MiBLSi has received and processed, along with the findings from this dissertation study and an understanding of the negative effects of role ambiguity on job performance, I have two related suggestions for action for MiBLSi to undertake as they work toward narrowing the divide between the ostensive and performative aspects of the role. First, I recommend that MiBLSi completely overhaul the Practice Profile to reflect what MiBLSi now knows to be the realities of MTSS coordination. Second, I recommend providing more transparency about the true expectations of MTSS coordinators to candidates for this position, as well as to the ISDs that hire them.

***Practice Profile.*** While the Practice Profile offers an extensive and detailed depiction of what the architects had in mind, it is long, unwieldy and challenging to navigate. It also presents all of the Critical Components with equal weight, when, as this study has shown, certain functions play a more essential part in MTSS coordination than others; some Critical Components, in fact, have even been identified as non-essential.

As I discussed in the previous two chapters, the Practice Profile does not entirely reflect the true priorities of the MTSS coordination function. As we learned in these previous

analyses, certain Critical Components –organize, coordinate and co-facilitate the work of the ISD and District Implementation Teams and effective communication – have emerged across sources as more vital to success than others. One Core Team member specified that the Practice Profile – the primary documented design for practice - would benefit from an overhaul, knowing what we know now about the work of MTSS coordination, and could then be used more actively as an evaluation tool; one of their colleagues suggested that it simply be discarded.

A modified Practice Profile that reflects the Three Domains Framework could be used as a tool to screen incoming coordinators for competencies and to design individualized support plans for their success. A Core Team member made the following suggestion that for a MTSS coordinator,

It would be great to see where are your areas of strength, where are your areas of need, and then how does a district or ISD develop an individualized plan so that you can be linked to the appropriate supports, whether it's professional development or online modules, books to be able to address the areas that you need to beef up your skills. We're just not there yet.

Crafting and distributing a revised Practice Profile, designed for the multiple purposes of communicating expectations, evaluating performance, and designing individual professional development plans should be a high priority for MiBLSi moving forward.

***Job description.*** One of the primary concerns about the misalignment between the MTSS coordinator role as designed and as enacted is the lack of clarity MTSS coordinators have about the expectations and functions of this position. It is not unlikely that MTSS coordinators and the ISDs that selected them have misconceptions about the functions of the work and its requisite competencies, in part due to the absence of a clear and concise documented design for the role.

MiBLSi does not directly participate in the hiring of MTSS coordinators; this is in the purview of the ISD administration. What MiBLSi can do is inform the selection process by

providing a clear, realistic, and prioritized job description to the ISDs, based on the functions and priorities as laid out in the Three Domains of MTSS coordination Framework. This description should include the non-negotiable expectations for skills and knowledge, as well as other essential competencies. It would also be worthwhile to delineate the realities of the time and task commitment for MTSS coordination, to be taken into consideration when combining the MTSS coordinator role with other ISD positions, such as school psychologist or behavior specialist, and determining the allocation of time for the responsibilities of each function.

### **Focused and Consistent Guidance**

A Core Team member described MiBLSi's intent in offering guidance to MTSS coordinators "to build capacity, not dependency." This objective signifies a priority in developing the specific skills and knowledge necessary for the MTSS coordinators to conduct their work independently, to identify their own needs, and to seek out resources for support accordingly. However, without a clearly defined and prioritized set of functions and competencies on which to base a consistent and meaningful system of supports, this goal will be difficult to realize.

What MiBLSi has found itself to have, instead, is an extensive but inefficient and loosely structured conglomeration of support mechanisms that address a variety of facets of the MTSS coordinators' role. One Core Team member admitted that "We don't have right now a systematic way of beefing up the skills of MTSS coordinators." The problem lies not in a lack of guidance, but with the absence of focus, consistency, and direction across the supports that are offered.

**Building Knowledge.** According to the MTSS coordinator survey, MiBLSi's system of supports is thorough and beneficial; in fact, none of the supports MiBLSi offers was ranked "unhelpful" by the MTSS coordinators. Those rated in the survey as most helpful

were the MiBLSi website, special conference opportunities, and books and other printed resources; all of these fall under the domain of knowledge-building.

The priority the MTSS coordinators' place on using MiBLSi supports to develop their knowledge provides further evidence that they are entering their role with a lower level of competency than MiBLSi expected. It confronts the Planning Team's vision, which is embodied within the Three Domains Framework. This framework provides for only about 20% of the guidance for MTSS coordinator role on building knowledge and skills. One Core Team member explained that "We need to flip the classroom. We spend a lot of energy and time building background knowledge, but would prefer to have the MTSS coordinators do that on their own. Then we can problem-solve when we're together." The time and expertise of MiBLSi's staff is better utilized in untangling complications that arise in the implementation process than in delivering content knowledge. A Core Team member responded to this challenge, saying,

The question I always ask myself is, 'OK, we can't control that, we obviously can't stop time, but [can we] try to compensate for their lack of confidence or their lack of knowledge? And a part of that is why we've moved to online modules. Part of that is why we moved to recording trainer support sessions. We're going to start archiving actual trainings. So we're going to try to scaffold and give people access to the further understanding and modeling of these somewhat complex concepts.

**TAP Guidance.** According to this dissertation study and to feedback collected both formally and informally by MiBLSi, TAPs provide the majority of the support to MTSS coordinators by co-planning for and co-facilitating ISD and District Implementation Team meetings and training sessions. These are also the areas where, in their survey, the MTSS coordinators reported spending the largest percentage of their time. However, while the TAPs are, in general, highly valued by the MTSS coordinators, their support is individualized and its effectiveness varies. One Core Team member talked about the differential between strong and weak TAP support in preparing for DIT meetings:

From what I'm seeing, depending on who the Technical Assistance Partner is...some TAPs have a very, 'Okay, let's meet and plan and let's go through the content.' The conversations are very focused. Other TAPs have a "wing it" attitude, just like the coordinators, and so it's not uncommon for me to get a litany of text messages, like I did this morning, saying, 'Hey, this conversation is going on with the team. What do I do? How do I...?' The coordinator and the TAP are in the midst of a training right now, freaking out because they're not prepared... Now they're texting me for some coaching support. That's a huge issue.

One MTSS coordinator expressed having trouble with the conceptual slides in the DIT content, so they ask the TAP to run them through a "dummy filter" to boil the guidance down to a very practical, uncomplicated level.

**Actions MiBLSi has taken.** A number of changes have been made in 2014-2015 to the way in which MTSS coordinators are supported and guided in their work, and more reforms are in the works for the upcoming years. MiBLSi plans to continue to provide access to the full range of valuable resources currently available to MTSS coordinators, but intends to improve upon them by adding continuity and clarity to the collection.

***MTSS Coordinator Network meetings.*** The most notable modification in MiBLSi's support system for MTSS coordinators has been the format of the MTSS Coordinator Network meetings. The Core Team, the Planning Team, and the Pit Crew, which have overlapping membership, have conspired to initiate the move to fewer, more focused MTSS-Coordinator Network meetings. These meetings have been restructured to center on the two most highly privileged Critical Components: organize, coordinate, and co-facilitate the work of the District Implementation Team and effective communication, as found in this study and corroborated by the Planning Team's MTSS coordinator and TAP surveys. These groups have colluded to standardize the agendas and structures of these meetings, creating the predictability and efficiency of a routine. This routinization is intended to liberate cognitive space among the planners, presenters, and participants so they can concentrate their energies on the content-at-hand and the interactions about it.

The revised format for the Adobe Connect calls centers on a Problem of Practice protocol. MTSS coordinators are invited to submit suggestions for meeting topics based on challenging issues in their work. The Pit Crew gathers those suggestions and determines which topic would be most relevant to the Critical Components prioritized in the calls and most beneficial to the greatest number of coordinators. Once the problem of practice has been identified, the Pit Crew contacts the submitting coordinator and their TAP about presenting their particular question about it on the upcoming Adobe Connect call.

As the Pit Crew member designated to facilitate the Adobe Connect calls, after setting norms and orienting the group to the agenda and objectives for the meeting, I began each session with a half-hour overview of the day's problem of practice, placing the issue in the larger context, beyond MiBLSi. In some cases, the Pit Crew recruited MTSS coordinators and TAPs who were finding success in addressing the problem of practice to share their learning and experiences. This introductory session was followed by a review of the Problem of Practice protocol. The protocol includes a presenter (the MTSS coordinator with the problem), a facilitator (me), and the group (other participants on the call), who engage in the following steps:

1. Presenter describes problem in detail
2. Group asks clarifying questions; presenter responds
3. Group asks probing questions; presenter responds
4. Group offers suggestions and solutions to problems
5. Presenter reflects on group suggestions and outlines possible next steps
6. Group shares what they learned through the conversation
7. Group shares feedback about protocol

The Problem of Practice conversation typically lasted about one hour. We then wrapped up the meetings with a summary of what was covered and updates on upcoming events and meetings.

The newly designed MTSS Coordinator Network meeting format has been well-received by participants. In reference to the coordinators who shared their experiences during

the introduction to the Problem of Practice, a TAP participant commented, “I think hearing from [the two MTSS coordinators] prior to the problem of practice helped ‘prime’ us for richer problem of practice discussion.” A coordinator described a benefit of the network and the connection with others in the MTSS coordinator role by saying, “Your problems are not unique. Hearing you talk and hearing the responses helps to strengthen the depth and breadth of what we need to be thinking about and be able to use for responding to our own challenges.” Another coordinator shared the broader insight that “Any time a process is used for problem solving it seems to better frame the problem and lead participants to solutions rather than ongoing ‘problem admiration.’”

Nonetheless, the Adobe Connect format is a challenging venue in which to conduct this type of interactive dialogue. One participant represented the most glaring limitation with the format, stating at the end of a call,

I would have been more comfortable to have people engage in a verbal discussion. Sometimes, the written responses got cut off when moving to the next phase. It also seems to limit the expansion of thought a back and forth verbal exchange invites.

Another compared the call to the Problem of Practice format used at an in-person meeting: “I think it worked a little better when we were face to face last year in Lansing. I also liked having several topics to choose from.” On the call, offering multiple topics simultaneously would be logistically difficult, if not impossible. With a nod toward the plans for future regionalization of MTSS meetings, a TAP and member of the Planning Team shared, “I am wondering how TAPS might be able to utilize this protocol on a regional level and then bring it back to our larger MTSS-C network.”

***Improving Reach.*** Beginning in the fall of 2015, MiBLSi will no longer conduct MTSS coordinator Network meetings via Adobe Connect. While this format removed geographical restrictions from participation, the Core Team, Planning Team and Pit Crew all noticed low and declining attendance in these sessions, despite their revised format.

Although the feedback from those who attended was positive in relation to the usefulness of the content and the Problem of Practice protocol, the limitations of conducting interactive problem-solving sessions in a webinar-type venue proved challenging and frustrating for planners, presenters, and participants alike. Thus, MiBLSi is endeavoring to extend the reach of its supports in other ways.

Since MiBLSi is a statewide project, its participants are scattered across both the lower and upper peninsulas of Michigan. Historically, MiBLSi has asked participants to travel to Lansing for its semi-annual conferences, the MTSS Coordinator Network face-to-face meetings, and other statewide trainings. Because travel time and expense factored into attendance at these sessions, some MTSS coordinators missed out on valuable professional development experiences due to logistical issues. A Core Team member summed up the rationale for rethinking the use of a single, centralized location for meetings and trainings, saying,

We're going to be offering some trainer work supports throughout the state so we can increase the reach. Traditionally, we have everything in Lansing but we have people that live in Houghton and it's like a 12-hour drive. We've got to look at expanding our supports across the actual state and not just have things in a central spot.

A shift toward the geographical decentralization of supports has already begun to take place, in the hopes of bringing relevant, high-quality support to all coordinators on a more consistent basis. The online modules are designed for the MTSS coordinators to use to build their own knowledge and skills surrounding MTSS practices and implementation science, and can also assist them with building the capacity of the local districts in these areas. Trainer workdays have been recorded and posted to the MiBLSi website to enable access to everyone, and to ensure that the content being shared is applicable and currently relevant to the coordinator's current training needs.

In addition to these virtual measures, a new regionalized meeting format will be extended to the MTSS Coordinator Network in the fall of 2015. This format, used in 2014-

2015 for Planning Team, Pit Crew, and Unit meetings was piloted with the MTSS Coordinator Network at the June 2015 session, when a group of participants joined the Lansing-area meeting from a location in the Upper Peninsula via Life Size video technology. The plan moving forward is for several regional hubs to host groups of coordinators, all connected via Life Size, each with a TAP or other MiBLSi staff member on hand to facilitate local interactions.

The aim of the new meeting format is to encourage increased participation in these professional development experiences by creating a live, interactive learning environment without the hassle and expense of statewide travel. The anticipated benefits include the further development of professional connections among MTSS coordinators within each region and collaborative problem-solving in ways that were not possible via the Adobe Connect calls.

***Scope and Sequence.*** An aspiration of the Core Team and the Planning Team has been to better define a consistent and intentional scope and sequence for MTSS coordinator professional learning. The objective of this more carefully pre-planned system of supports would be to more efficiently and effectively strike a balance between developing a deep understanding of the structures that drive MTSS and implementation, and the professional practices that enable the MTSS coordinators to do their work well. While the scope and sequence work is still nascent, these teams have come to the realization that the current system of supports, while comprehensive, has a piecemeal, reactive, and sometimes rushed character that could be remedied with forethought. One member of both the Core Team and Planning Team said,

I think all of the supports that we've provided have been helpful. I do think that they have taken people from Point A to a different place. What I think has been lacking is a scope and sequence. Preparing [MTSS coordinators] to deliver a training is not really preparing them to really understand the why and the ramifications of, if these things aren't done, what will happen. We've never been able to get to that type of depth because of the lack of time.

The feeling expressed here is that carefully planning a trajectory of support founded on the realities of the MTSS coordinators' functions, competencies, and needs will improve the quality and efficiency of the guidance MiBLSi offers.

Another argument for a scope and sequence of guidance for coordinators is the ability to be proactive, anticipating needs rather than responding to them. This may prove particularly fruitful with incoming coordinators, who may not yet be able to identify their own challenges. A Core Team member articulated this point:

We have so many needs but it's something that I want to keep in my mind because as we better scope and sequence out of the work of the MTSS coordinators, could we already have in our mind, 'Okay. Let's just pull this out and put it in a folder of this could be critical for someone who's brand new'? Can we almost just anticipate that and start to identify some things that would be essential for someone out-of-the-blue brand new so then it's at least sort of structured and doesn't throw all of us?

The implementation of a planned arc for coordinator support, grounded in feedback about their needs at various stages of their tenure, would facilitate and routinize the initiation of new coordinators.

***MTSS coordinator certification.*** The idea of potential state certification for MTSS coordination has arisen in the conversations surrounding the creation of a scope and sequence of supports. Certification, according to several Core Team members, would provide legitimacy and permanency to the role and incentive to its incumbents to engage in focused professional development. One Core Team member commented on the potential benefits:

Ideas keep coming back to how do you make this almost like a MTSS coordinator certification at the state level, so it's something that's lasting? That people are working towards an end goal? That they're acknowledged that they have a unique skill set that they're building? They're doing a bunch of work to deepen their knowledge, to implement. It doesn't currently exist, but wouldn't it be pretty darn neat if we could say, by the time our grant cycle in 2017 goes away, MDE [Michigan Department of Education] has a MTSS coordination Certification... That would be pretty sweet.

However, if the state is to endorse the qualifications of MTSS coordinators, a clear definition of the role will have to be communicated, along with a standardized and rigorous professional development sequence.

The Planning Team fleshed out a draft of a MTSS Coordinator Certification course of study, structuring it like a graduate-level degree program. In its current iteration, the curriculum is built around three main focus areas: MTSS systems and practices, systems understanding, and leadership. In this proposed program, the lower-level courses for novice coordinators include introductions to the big ideas of these concepts; the intermediate-level courses add details and strategies to the big ideas; the advanced courses integrate the concepts, centering on systems thinking, decision-making, and leadership.

The process of creating this certification program curriculum edified the vast array of competencies expected for successful MTSS coordination; the Planning Team estimated the time needed to complete all of the courses at 160 hours, or approximately 22 full days, across the span of two years. That said, with some prioritizing and grounding in the Three Domains Framework, which was developed after this curriculum was drafted, this proposed course of study represents a solid beginning to a realistic scope and sequence for MTSS coordinator support.

**Recommendations for MiBLSi.** In view of the feedback that MiBLSi has gathered and analyzed and the data I have collected in this study, I suggest that MiBLSi continue the direction it has begun to take with revising its system of supports for MTSS coordinators. I encourage MiBLSi to continue to strengthen the MTSS Coordinator Network and to further develop a planned scope and sequence for guidance, based on the Three Domains Framework.

***MTSS Coordinator Network.*** Because there is not yet a research base for MTSS coordination, I take a page out of the teacher education literature to illustrate the importance

of developing the MTSS Coordinator Network. Teachers who work collaboratively through professional development activities co-construct a shared understanding, an essential component of organizational learning that impacts the culture of a school over time (Garet, Porter, Desimone, Birman, & Yoon, 2001; Collinson & Cook, 2006). In professional development models that are collaborative, connected to teachers' work, sustained, intensive, supportive, and connected to other aspects of school change, "teachers confront research and theory directly, are regularly engaged in evaluating their practice, and use their colleagues for mutual assistance," all in the process of improving their practice (Birman, Desimone, Porter, & Garet, 2000; Darling-Hammond & McLaughlin, 1995, p. 11; Garet, Porter, Desimone, Birman, & Yoon, 2001).

Just as there is great potential for reforming instructional practice through ongoing collaboration that is grounded in the realities of the work, aligned with district priorities, and focused on student learning, so is there promise in this model for MTSS coordinators. By regionalizing the MTSS Coordinator Network meetings, allowing for more consistent, face-to-face interaction between coordinators, and by affording the coordinators the opportunity to learn with and from each other as they share through the Problem of Practice protocol, MiBLSi is drawing on the principles of professional development that have shown to lead teachers to sustainable instructional improvements.

The feedback from the MTSS coordinators also calls for building the Network. Through their survey, they communicated to MiBLSi that they would like more frequent opportunities to meet face-to-face, specifically mentioning a regional forum, to problem-solve around their current professional challenges. During the Adobe Connect calls, they suggested via chat box that the Problem of Practice protocol, while it offers an opportunity to connect and think collaboratively on common issues, could be more productive in a verbal

exchange; they specified that the online format limits their ability to engage meaningfully with one another.

The MTSS Coordinator Network could be further strengthened by making visible the particular strengths of each coordinator, that is, the areas in which they could be useful resources to others. For example, a MTSS coordinator who is also a behavior consultant may be well-equipped to assist with PBIS training, whereas a school psychologist is likely to be well-versed in data based decision making. Sharing a database that includes the specializations of each coordinator, along with contact information, would encourage the Network to become more self-reliant and self-sustaining, with the coordinators turning to each other as a first line of support, rather than MiBLSi staff. This aligns with MiBLSi's objective to build capacity, not dependency, through its system of supports.

***Scope and Sequence.*** MiBLSi has recognized and acknowledged the benefits of moving to a predetermined, intentional scope and sequence for its extensive compendium of MTSS coordinator supports. Again, research on teacher learning can serve to fortify the Core Team's concerns that a reactive and disconnected collection of learning experiences is less productive than an ongoing, proactive, coherent system of professional development. In order to foster and sustain actual change in the technical practice of teachers in classrooms, districts and schools must commit to providing a coherent set of expectations, standards, and opportunities for professional improvement and organizational learning (Birman, Desimone, Porter, & Garet, 2000; Garet, Porter, Desimone, Birman, & Yoon, 2001); the same could be applied to MTSS coordinators' professional learning. In a three-year study of collaborative Critical Friends Groups as mechanisms for teacher professional development, Curry (2008) noted that, while these were long-term structures, the professional development trajectory felt disjointed, as the groups did not carry sustained themes from one meeting to the next.

To improve the odds that professional learning experiences will lead to lasting reform, teachers (or MTSS coordinators) need a relevant, sustained, and coherent system of organizational learning that represents a clear articulation of district priorities and consistency with state initiatives (Desimone, Porter, Garet, Yoon, & Birman, 2002; Kruse & Louis, 1997). If learning opportunities are situated among a compendium of unrelated improvement efforts and professional development initiatives, they become just another strain on educators' limited time and attention (Allen, Osthoff, White, & Swanson, 2005; Kruse & Louis, 1995; Saunders, Goldenberg, & Gallimore, 2009).

Some initial groundwork has been completed by the Planning Team to sketch out a potential scope and sequence for MTSS coordinator training and support. I recommend that, since the Planning Team is no longer an entity, and since the vision and direction have been set, a Pit Crew be formed to continue to refine this design by reconciling the balance of supports with the foundation of the Three Domains Framework. Additional steps to take with this plan might include determining the appropriate venues and audiences for each of the strands, designing an evaluation protocol to determine the successful mastery and application of the content, and identifying ways to differentiate the trajectory based on individual strengths and needs.

## **Discussion**

### **Alignment with Continuous Improvement Models**

Organizational theory is rife with models of continuous improvement. Many of the models intersect and overlap in concept, with the general cross-cutting premise of using input, feedback, and/or data to improve the practices, functions, and/or operations of an organization. Typically, these models are used to inform organizational growth in business settings; however, I have found that the work that MiBLSi is doing to improve its model aligns with several major models of continuous improvement, thus demonstrating their

potential for application in nonbusiness settings, as well. Although MiBLSi is not overtly inspired or informed by any of these theories, in this discussion I describe a few prominent continuous improvement models and demonstrate how they might map onto MiBLSi's trajectory and motivation for organizational change.

**Kaizen.** Kaizen is a continuous improvement model that originated in Japanese management practice. Literally translated, it is a combination of the words *change* (kai) and *better* (zen) (Mleczkowska, 2014). Broadly defined, it is “a long-term approach to work that systematically seeks to achieve small, incremental changes in processes in order to improve efficiency and quality” (Rouse, 2009). Kaizen lies in contrast to, and can work in conjunction with, *kaikaku*, which is radical innovation (Gåsvaer & von Axelson, 2012; Kotelnikov). According to Gåsvaer and von Axelson (2012), “The combination of both kaizen and *kaikaku* seems vital: with radical improvement quickly achieve results and jump-start critical initiatives, and with continuous improvement sustain results and gradually improve” (p.758).

MiBLSi's earlier move from a building implementation model to a district implementation model echoes *kaikaku*, in that it entailed a fundamental shift in the focus of the initiative, including the creation of the ISD MTSS coordinator function. Now that this radical innovation has been implemented, MiBLSi has moved to a phase that resembles kaizen, in which it seeks to refine the updated model through smaller, ongoing renovations (Al Smadi, 2009).

**Classical negative feedback.** MiBLSi's goals for continuous improvement process also aligns with what Sterman (1994) calls *classical negative feedback*, “whereby decision makers compare...information about the state of the real world to various goals, perceive discrepancies between desired and actual states, and take actions that (they believe will) cause the real world to move toward the desired state.” He specifies that multiple iterations of feedback and subsequent revisions may be required to achieve this optimal condition. As I

revealed in this chapter, MiBLSi regularly gathers feedback to identify divergences between the role design and the way it is carried out, in theory to move the enacted practice toward the ideal vision. Sterman recognizes that this feedback loop does not work in isolation, but rather within a context of organizational and cultural influences that impact our perception of systems, policies, practices, and objectives (Sterman, 1994).

**Creative tension.** Senge (2001) extends Sterman’s theory of classical negative feedback by describing *creative tension*, in which the energy for change is generated by juxtaposing an ideal vision against the current reality. In the case of MTSS coordination, this tension would exist between the ostensive role design and the performative practice of the MTSS coordinators. The tension produced by the gap between the vision and the reality – the ostensive and the performative - can be resolved either by moving the reality toward the vision or by adapting the vision to meet the reality. This model differs subtly from traditional problem solving models such as classical negative feedback in that, rather than attempting to move away from or alter the current reality, the aim is to reconcile it with an ideal vision. The analysis in this chapter revealed that MiBLSi follows this model, with its objective of gathering feedback to inform both the design for practice and the way in which it is enacted, more closely than Sterman’s model.

Gathering information about the state of the organization, as MiBLSi does, is a critical element in resolving creative tension. When informing positive organizational change through creative tension, “An accurate picture of current reality is just as important as a compelling picture of a desired future” (Senge, 2001, p. 77).

**Deuterolearning.** MiBLSi’s proactive continuous improvement process could be qualified as deuterolearning. Argyris and Schön (1978) identified three types of learning within organizations: single-loop, double-loop, and deuterolearning. Single-loop learning, as its name suggests, relies on one feedback cycle through which errors in practice are detected.

Single-loop learning, also called lower level learning (Fiol & Lyles, 1985) and adaptive learning (Senge, 2001), results in superficial changes in strategies, but there is no ensuing evolution of systemic norms or policies within the organization. Double-loop learning includes the single-loop cycle, but also incorporates the higher level (Fiol & Lyles, 1985), generative (Senge, 2001) learning that leads to fundamental organizational changes. Finally, deuterolearning signifies intentionality in the learning process. In deuterolearning, there is a metacognitive awareness that organizational growth needs to happen, and it can be applied to both single- and double-loop learning (Argyris & Schon, 1978).

### **MiBLSi's Approach to Continuous Improvement**

MTSS coordination is a complex function within MiBLSi. Although the role was crafted with an ideal vision in mind, the realities of this work have confronted that initial design. MiBLSi's Core Team has recognized the resulting creative tension and is thereby motivated to resolve the discord between the ostensive expectations for practice and the performative experiences of the MTSS coordinators.

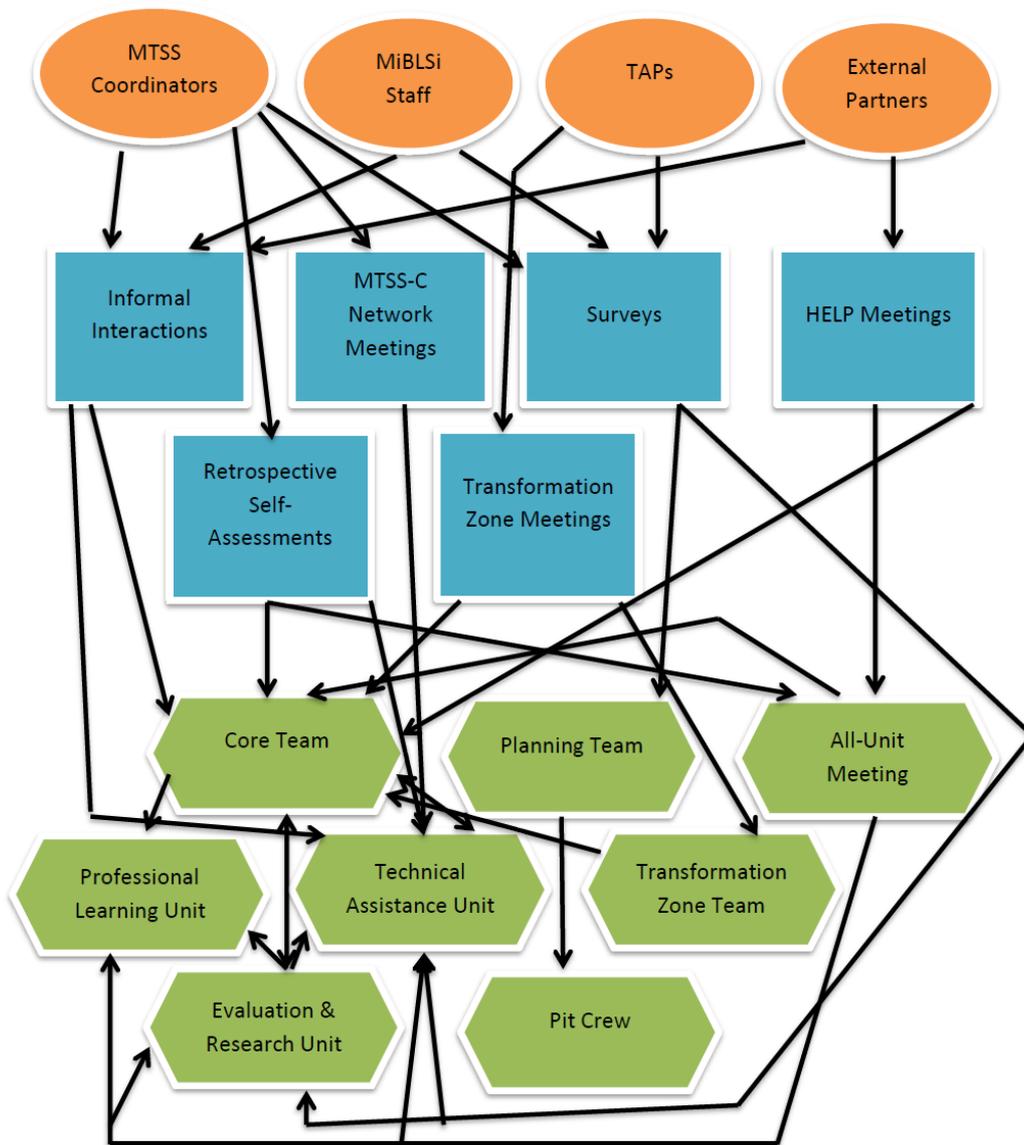
MiBLSi has sought feedback from numerous sources to inform continuous improvement of the MTSS coordinator role and the supports thereof. Although it was not a part of the research question I initially posed, through this investigation I have discovered that MiBLSi has a fragmented approach to gathering and analyzing feedback (See Figure 6.7: Pathways for Collecting and Processing Feedback). This barrier impedes an efficient route for translating feedback into organizational change. As illustrated in Figure 6.7: Pathways for Collecting and Processing Feedback, there are numerous potential routes a piece of input might take within MiBLSi, depending on a number of factors including where it originates, how it is collected, and who is available to process it. The unpredictable and sometimes convoluted path that feedback takes can result in lost or misinterpreted information as well as delays in using it to move the project forward.

Despite the challenges of using a disjointed collection of mechanisms to collect and process feedback, MiBLSi has been able to use this input to identify big-picture challenges for MTSS coordination. Two overarching themes emerged from the feedback MiBLSi gathered: the existence of a gap between the expectations for MTSS coordination and the capacity of those carrying it out, and the need for more focused and consistent guidance for effective practice. The project has already begun to address both of these issues in several ways.

At the heart of the organizational changes regarding MTSS coordination is the development of the Three Domains Framework. This framework clarifies the responsibilities and the priorities of the MTSS coordinator role. If MiBLSi leverages the principles of the Three Domains Framework as it reshapes the documented design for practice and the system of supports for MTSS coordination, it will bring clarity, coherence, and consistency to this function, and will increase the odds of professional success for the MTSS coordinators.

In addition to this important advancement in the role specifications for coordinators, MiBLSi has initiated modifications to its guidance plan by standardizing the format for MTSS Coordinator Network meetings, increasing the geographical reach of support, and collaborating around the development of a scope and sequence for MTSS coordinator guidance. I have suggested that MiBLSi continue its trajectory for improving the MTSS Coordinator Network, to build the capacity for MTSS coordinators to work independently and to assist each other. I also advise that MiBLSi persist in crafting a scope and sequence for guidance, drawing on the Three Domains Framework in the interest of creating clarity, coherence, and consistency across the project.

**Figure 6.7: Pathways for Collecting and Processing Feedback**



### Conclusion

In this chapter, I have introduced the mechanisms MiBLSi uses to collect and process feedback about MTSS coordination from a multitude of sources. I have described some of the key pieces of learning that MiBLSi has taken from this feedback and I have shown how the project has applied that information toward organizational growth. Finally, I have made recommendations as to how MiBLSi can continue to use its findings to further strengthen its structures and practices surrounding MTSS coordination.

In the next – and final – chapter of this dissertation, I will bring together all of my findings from this study and discuss the implications of my learning for MiBLSi and for the school improvement field on the whole. I will end by sharing my concluding thoughts regarding the study and outlining potentially rewarding directions for continuing this research agenda.

## **CHAPTER VII**

### **CONCLUDING THOUGHTS**

I conducted this study with two broad purposes in mind: (1) to learn about the coherence between a hub-based initiative's vision of the functions, competencies, and guidance for network-based support agents and the practice of those enacting the role; and (2) to observe how the organization collects, processes, and applies feedback from multiple sources toward the continuous improvement of the design, enactment, and support of this role within the initiative. I have reported at length about my achievement of these objectives in the preceding chapters of the dissertation. In addition to these outcomes, I have created a useful elaboration of an analytic framework for studying the privileging and subordination of components of practice. More specific to this study and its participants, I have contributed to the professional development of interviewees through guided reflection, and to MiBLSi's continuous improvement process by sharing my findings throughout the dissertation process.

#### **Summary of Findings**

Throughout the analysis of the research questions, I found both convergence and divergence among sources, particularly in terms of the privileging and subordination of the functions, competencies, and guidance associated with MTSS coordination. There are multiple potential explanations for differences in privileging between and among the documented and voiced representations of practice and the coordinators' interpretations and enactment of their role. The documented representation of practice was crafted as an ideal vision of MTSS coordination, before anyone had ever attempted the work. While it was not uninformed – the Critical Components within it were drawn from MiBLSi's prior work – the specific practices involved in ISD-level coordination were, to a degree, speculative. In

designing the Practice Profile, the Core Team was not able to predict the proficiencies or the professional capital of the coordinators, nor could they foresee the particular needs of district-level capacity building across contexts. Adding complexity to this issue is the fact that MiBLSi is not involved in the selection of MTSS coordinators; each ISD hires the coordinator that meets the criteria tailored to its own priorities, which may or may not align with other ISDs or with MiBLSi's vision.

With the range in hiring criteria, the MTSS coordinators come from a variety of professional and academic backgrounds, as represented in the participants' profiles in Chapter III, that prepare them each differently for the role. This variation, coupled with the unique features of the ISDs and districts with which they work, means that each coordinator brings a unique perspective on the role. They may favor particular functions and competencies because they trend toward their own strengths, or because they focus on the immediate needs of the local context. Add to this equation the communication challenges that MiBLSi faces with coordinators spread across the state, and the breaks in conformity are justifiable and even expected.

Despite all of these divergences, the multiple data sources converge to illuminate some overarching findings. Across sources, the most highly privileged functions of MTSS Coordination within MiBLSi are the organization, coordination, and co-facilitation of ISD and District Implementation Teams and effective communication. Extending this finding, communication and interpersonal skills, along with knowledge of MTSS and implementation science are the most highly favored competencies for those in this role. The most valued forms of guidance for MTSS coordinators are personal and interactive: the Technical Assistance Partners and the MTSS Coordinator Network meetings. I have also learned through the feedback collected by MiBLSi that there is some concern within the project about the alignment between the expectations for MTSS coordinators and their capacity to

carry it out, and about the focus and consistency of the system of supports. In response to these priorities and challenges, MiBLSi has started to make adaptations to the MTSS coordinator role design and the guidance and support thereof.

Informed by several continuous improvement models, including kaizen (Al Smadi, 2009; Gåsvaer & von Axelson, 2012; Kotelnikov; Rouse, 2009), classical negative feedback (Sterman, 1994), creative tension (Senge, 2001), and deuterolearning (Argyris & Schon, 1978), I have analyzed the ways in which MiBLSi collects, processes, and applies feedback about MTSS coordination. I have exposed some of the challenges the project faces with its lack of an organized, intentionally-designed system for continuous improvement and have made suggestions as to how MiBLSi can be more deliberate and efficient with its gathering and use of targeted feedback to improve the design and guidance for the MTSS coordinator function.

### **Contributions**

This case study contributes to the research literature by adding a dab or two of color to the impressionist tableau of large scale school improvement theory. While its findings may not be generalizable across cases or to a greater population, this small study adds depth and detail to the broader picture by calling attention to important questions and by adding a measure of specificity to the emergent theories about building local capacity for instructional improvement. As Tsoukas (2009) described it, “The specific is not subsumed into the general; it rather further specifies the general” (p.288). The concepts that have been brought to light in this dissertation will play a part in the accumulation of knowledge and the development of theory in the research literature.

Extending beyond MiBLSi, the findings from this study will inform large scale school improvement implementation being undertaken by similar enterprises. Regional MTSS Coordination as MiBLSi has incorporated it is a unique function; disseminating the

learning from this study will inform similar enterprises as to how the function is designed, enacted, and supported, as well as how those factors and the connections between them might be enhanced. This could be critical learning in the quest to scale up reform efforts through a district-based improvement model instead of working directly with schools.

This study has also taken up the question of continuous improvement in this type of complex, hub-based enterprise. Since, in educational initiatives, “It is not sufficient that *student learning* improves; organizations and their collective human capacity must also learn in order for improvements to be implemented effectively, sustained locally, and adopted (or adapted) at new sites” (Sabelli & Dede, 2015), this learning will be fruitful in the development of large-scale school improvement enterprises as efficient and effective learning organizations.

This research is also intended to contribute to the practice of building local capacity for improvement through regional consultants. It has already added to MiBLSi’s development of the design and guidance for the MTSS coordination function. The challenge is now to bring this learning to life across other similar initiatives. Having identified a gap between research and practice, Penuel et al. (2015) studied research-practice partnerships for two years, aiming to find explanations and solutions. They learned that close, collaborative work between researchers and practitioners is both more complicated and more transformative than the “one-way translation of research into practice” (Penuel, Allen, Coburn, & Farrell, 2015, p. 183). Although I was able to join forces with MiBLSi in this type of thorny-yet-productive relationship, other initiatives will need to take up the learning from this study independently.

### **Analytic Framework**

In this study I have expanded and enhanced the Feldman and Pentland (2003) model of the ostensive and performative aspects of routines by developing a framework that enables

the analysis and comparison of the privileging and subordination of the voiced and documented designs for practice. This framework is initially presented in Chapter 4 (Findings: Design for Practice) and extended in Chapter 5 (Findings: Interpretation and Enactment of Practice).

This revised framework, while specifically designed for use in this study, is readily adaptable to other initiatives. I demonstrated this flexibility by adding the “notable” designation for my analysis of the MTSS coordinators’ interpretations and enactment of their practice. I aspire to share this framework with the field of school improvement research, in the hopes that it will prove useful to other researchers whose analysis involves the comparative privileging of representations of practice.

### **Design for Practice**

In this study, I observed that MiBLSi’s leaders have made important progress toward clarifying and edifying the MTSS coordinator role through the development of the Three Domains Framework. This redesign for practice reflects the highly privileged functions and competencies and brings the documented design for practice closer to the realities of the role while providing a foundation for a more efficient and focused system of guidance for coordinators. It brings the project closer to achieving a cohesive relationship between documented, voiced, and enacted representations of practice that reflect consistent priorities expressed across the project.

Other initiatives will, of course, have their own designs for practice and their own visions for the functions, competencies, and guidance associated with enacting those designs. What this study contributes to other enterprises is a framework on which to identify the privileging and subordination of these components. Once recognized, the privileged components can be used to refine role definitions, narrowing the gap between the documented and voiced designs for practice and its enactment.

## **System of Supports**

MiBLSi has identified the development of MTSS coordinators' capacity to carry out their role independently as a priority in their system of supports. Across the project, Technical Assistant Partners (TAPs) are recognized as the most critical source of guidance for the MTSS coordinators. In recognition of the privileging of this mode of guidance and the impact the TAPs have on the success of the project, MiBLSi has begun to expand the TAP role, giving them more ownership over the supports for MTSS coordinators. The MTSS Coordinator Network meetings, now organized by TAPs, have been restructured away from knowledge building and toward building a community of practice. I expect that this will encourage the coordinators to seek out individual learning experiences to deepen their content expertise. Supporting this strategy, MiBLSi plans to continue expanding its library of online modules.

One direction that MiBLSi might take with the learning from this study is to recraft the documented design for practice - the Practice Profile - to more accurately reflect the current realities of the MTSS coordinator function and the priorities set forth in the Three Domains Framework. A revised design for practice could then inform the development of a detailed role description to share with ISDs to guide the selection of MTSS coordinators and the allotment of time to the role. This Practice Profile could also serve as a framework for professional reflection and evaluation tools.

## **Professional Development through Guided Reflection**

A final outcome of this study has been the professional development of the participants through guided reflection. While the definition and format of professional reflective practice is ambiguous in the literature (Collin, Karsenti, & Komis, 2013), multiple

scholars have found benefits in using reflection, in its various interpretations, as a professional development tool both in teaching and across a variety of career fields (Bruster & Peterson, 2013; Collin, Karsenti, & Komis, 2013; Harris, Bruster, Peterson, & Shutt, 2010; Tummons, 2011). The broad benefit of reflective practice is that it “facilitates the ability to learn from experience ... individuals’ actions are guided by what they have learned from previous experiences” (Harris, Bruster, Peterson, & Shutt, 2010, p. 3).

Hiller and DiLuzio’s (2004) study of the interviewee’s perspective on participating in research interviews found that participants often identified personal rewards when partaking in interviews. In line with this finding, several of the participants with whom I interacted during this study expressed appreciation for the time and opportunity to think and speak deeply about their work, particularly through the interviews. To illustrate, a Core Team member said to me,

The questions you ask force me to stop and reflect on what we’re doing and you’re removed enough to see the bigger picture and ask those questions when we’re stuck in this day-to-day wheel, which I think is hugely helpful.

A MTSS coordinator extended this thought, articulating the value in connecting with others in a dialogue about their work:

We have so little time in our field to just sit down with our colleagues and discuss what’s happening. One of the benefits [of participating in the study] has been processing everything that we’ve gone through throughout this year.

It brings me great satisfaction as a scholar to know that my work has brought benefits to its contributors, and that it has inspired learning beyond the research questions I have explicitly investigated.

### **Directions for Future Research**

I can think of no more appropriate summation of the dissertation process than the phrase, “The more I learn, the more I realize I don’t know,” credited to Albert Einstein.

Throughout this study I found myself pulled toward tangents, with the learning that came

through my analysis leading to further wonderings. Each finding raised multiple related questions, many of which could have been developed into its own study. In this section I share a sampling of some of the more provocative and potentially influential questions that came to mind during the course of the analysis and writing of this dissertation. I sincerely hope that some of these studies will be realized, either by me or by others who are inspired to read this as a call to action.

### **Using the Dissertation Data**

Because MiBLSi is a dynamic organization, continually adapting its model to meet the needs of its consumers, the structures and practices within the project are continuously changing and improving. While the data I gathered in this study are vast, rich and interesting, and while I have by no means tapped into all of the questions they might address, they are no longer reflective of the current state of the project. Nevertheless, there are still a few ways in which these data can be used productively before being laid to rest.

**MiBLSi's enactment of guidance.** In this dissertation, I examined at length and in depth how the MTSS coordinators leverage and enact the system of support and guidance offered by MiBLSi. There is another side, however, to the question of using guidance. An additional direction for analysis might be to investigate how MiBLSi designs and delivers the guidance they provide to the coordinators. This study would include detailed investigations of the decision-making and planning that go into selecting the topics, venue, frequency, and mode of guidance provided. It would look at the training that MiBLSi staff members receive before delivering formal or informal guidance to MTSS coordinators.

**MiBLSi's organizational evolution.** Another productive use for these now-historical data would be retrospective, in an investigation of MiBLSi's organizational evolution. To convert the current study into the launching pad for a longitudinal investigation could be interesting and informative and would contribute to a broader understanding of

organizational learning and continuous improvement within this type of enterprise. Such a study would enable the analysis of the innovations MiBLSi has undertaken, for example the Three Domains framework, the regionalization of MTSS Coordinator Network meetings, and the growing collection of online modules, and how they have influenced the interpretation and enactment of MTSS coordination in practice.

**Product of continuous improvement.** Much of the literature on continuous improvement is process-oriented (Al Smadi, 2009; Argyris & Schon, 1978; Fiol & Lyles, 1985; Gåsvaer & von Axelson, 2012; Rouse, 2009; Senge, 2001; Sterman, 1994), looking at how organizations engage in using feedback and input toward organizational learning. However, there has not been as much research conducted regarding the outcomes of these processes, comparing the organization before and after undertaking continuous improvement initiatives. It would contribute to the learning of MiBLSi, as well as the organizational learning literature on the whole, to reexamine the data I have collected regarding MiBLSi's continuous improvement through this lens.

**Role of the researcher.** I held a unique position in this research, in particular in the analysis of continuous improvement, in that I was both the investigator of and a contributor to MiBLSi's continuous improvement process. This dual role both complicated and enriched the study. I was learning about and contributing to MiBLSi's development simultaneously and recursively: my input to the project was based on my ongoing learning about it, while this learning – which included learning in real time about my own role – informed my contributions to the project. As a contribution to the theoretical literature on qualitative research methodology, I feel compelled to follow this study with a reflective piece about how I negotiated the concurrent roles of researcher and researched. In this article, I would share the benefits and challenges of engaging in the research case in this intimate way, exposing in detail the ways in which it simultaneously wrinkled and smoothed the dissertation.

## **Beyond the Dissertation Data**

**Developing local capacity in other initiatives.** One interesting way to follow the learning from this study would be to investigate other projects similar to MiBLSi to understand the mechanisms through which they develop local capacity for implementing comparable interventions and to observe how they take their initiatives to scale. Bringing these findings together with those from this dissertation might lead to a bigger and more generalizable picture of how to maximize the effectiveness, durability, and scalability of school improvement initiatives.

**Impact of systemic change on classroom implementation and student outcomes.** MiBLSi's grand objective is to improve student outcomes and equitable access to educational opportunity by helping to build local capacity to implement MTSS strategies in schools and classrooms. This student-centered aim can become lost while concentrating on what happens at the systemic level, such as I have in this study. However, it is important to bear in mind that the work that MiBLSi does at the ISD and district levels is designed to have a positive impact on teaching and learning in classrooms. It would be fruitful and fascinating to follow the changes in ISD-level MTSS coordination to the building and classroom levels to observe the effects they have as implementation trickles down the cascading structure of support.

**Impact of project teams.** The MiBLSi model specifies implementation teams as mechanisms for building local capacity at the ISD, district, and building levels. These teams, composed of administrators and educators, are supported by MiBLSi to lead the local MTSS implementation process. Tucker et al (2007) conducted a study about the role of project teams in the organizational learning of hospital units, posing the following research question: "How do improvement project teams promote implementation of new practices by the organization in which they work?" (Tucker, Nembhard, & Edmondson, 2007). They

observed the effects of organizational learning activities conducted by improvement project teams on the successful implementation of new practices across the entire unit. In a similar vein, conducting a study of MiBLSi's implementation teams would inform the practice of using ISD-, district-, and building-level teams to facilitate systemic instructional improvement.

### **Final Thoughts**

Time and again, research has demonstrated that the greatest barrier to the success of new programs in education is inconsistent implementation (Bertram, Blase, & Fixsen, 2015; Fixsen, Naoom, Blase, Friedman, & Wallace, 2005; Hoover, Baca, Wexler-Love, & Saenz, 2008; O'Connor & Freeman, 2012; VanDerHeyden & Tilly, 2010). Identifying an effective design for providing system-level support to schools and districts is likely to improve the odds of building local capacity to implement and sustain instructional improvement. Continuing to hone the system of supports for those in this role will contribute to the success and longevity of school improvement, bringing access to high quality educational opportunities to all students for years to come.

The case presented in this dissertation provides a substantive illustration of the complexity of this type of large-scale enterprise. To consider the level of complication that surrounds just one role in the mechanism of an instructional improvement initiative leads to an eye-opening realization of the enormity of undertaking reform at this level.

## **APPENDIX A**

### **INTERVIEW PROTOCOLS: MTSS COORDINATORS**

#### **Interview Protocol #1: MTSS Coordinator**

##### **Introduction and Informed Consent [15 minutes]**

Good morning/afternoon. Thank you for meeting with me today.

I am a doctoral candidate at the University of Michigan School of Education and I am conducting my dissertation research about the role of the MTSS coordinator in MiBLSi. Over a one-year period, I will be observing MTSS coordination across the state, focusing in particular on the experiences of three MTSS coordinators, including yourself.

There are three goals for this interview. The first is to learn more about your role and your work as an MTSS coordinator in MiBLSi. The second is to begin to understand your conceptualization of MTSS and the work that you do. The third is to start to learn about how you have been prepared to enact the role of MTSS coordinator.

Before beginning, I would like to review with you the procedures for informed consent and, then, give you an opportunity to ask any questions.

[Read through the consent procedures together. Give the interviewee the opportunity to review the form and to ask any questions. If the interviewee chooses to participate, have him/her sign the form and reiterate that they will receive a copy for their records.]

#### **Interview Guide**

[Start recording]

Today is (day/date). This is an interview about the role of the MTSS coordinator in Michigan's Integrated Behavior and Learning Support Initiative – which we'll refer to from here forward as MiBLSi. I am talking to (participant's name), an MTSS coordinator.

[Stop and review recording]

[Start recording]

This interview is structured in three parts. In the first part, we will discuss your role as an MTSS coordinator and your professional experiences before joining MiBLSi. In the second part, we will talk about your conceptualization of MTSS and how you came to that

understanding. In the third part, we will discuss your preparation for the work of the MTSS coordinator.

### **Part 1: Background [15 minutes]**

I'd like to begin by asking you about the roles or positions that you currently hold within MiBLSi and in your ISD, as well as about professional experiences you had prior to becoming an MTSS coordinator.

1. Tell me about your role as MTSS coordinator.
  - a. How long have you held this role?
  - b. How much of your professional time is dedicated to MTSS coordination?
  - c. How did you decide to become an MTSS coordinator?
  - d. What drew you to this type of work?
  - e. What drew you to this specific opportunity with MiBLSi?
2. What are your other current roles or positions in your ISD?
  - a. How long have you held these roles?
  - b. How much of your professional time is dedicated to each of these roles?
  - c. Would you please describe your responsibilities in each of these roles?
3. Could you describe your professional experiences before joining MiBLSi/ISD?
4. Please describe your professional preparation.
  - a. What degrees do you hold?
  - b. Outside of MiBLSi, what other significant professional development experiences have you had, if any, that helped you to prepare for your professional roles?
5. You're the MTSS coordinator in \_\_\_\_\_. Tell me about that ISD/RESA.
  - a. Where is it located?
    - i. What type of area is that?
    - ii. Can you paint a demographic picture of the area?
  - b. What about the ISD as an organization?
    - i. How many districts/schools does it serve?
    - ii. How many of those districts & schools are partnering with MiBLSi?
    - iii. How many people work at the ISD? In what types of roles?
    - iv. Other than MiBLSi support, what kinds of programming and support does the ISD offer to its districts?

### **Part 2: Understanding of MTSS [20-30 minutes]**

1. Prior to becoming an MTSS coordinator with MiBLSi, what experiences have you had with MTSS?
2. What training have you had in MTSS, both within and beyond MiBLSi?
  - a. What format has that training taken?
  - b. Have you done any additional self-directed study?
3. Imagine that I am an educator who is unfamiliar with the MTSS model. How would you describe MTSS to me?

4. Please also describe to me, the educator, your understanding of MiBLSi as an initiative.
5. Now explain to me your role and responsibilities as an MTSS coordinator within MiBLSi. What would you describe as your primary responsibilities in this role? Your secondary responsibilities?

**Part 3: Self-Assessment of Readiness for MTSS Coordinator Role [20-30 minutes]**

1. As I understand it, MTSS coordinators work in three directions: upward, laterally, and downward. The upward work is your interface with ISD leaders and other stakeholders in MiBLSi and in your ISD. The lateral work is the management of your ISD Implementation Team. The downward work is your interaction with district and school leaders. Is that an accurate characterization?
2. First, let's talk about your upward interactions, with the MiBLSi and ISD leadership.
  - a. What can you tell me about your work interfacing with the ISD leaders?
  - b. In what ways have your prior experiences prepared you to participate in these interactions or relationships?
  - c. In what ways or in what types of situations have you felt unprepared or underprepared for these interactions or relationships?
3. In working with your ISD Implementation Team:
  - a. What types of interactions do you have?
  - b. In what ways have your prior experiences prepared you to participate in these interactions or relationships?
  - c. In what ways or in what types of situations have you felt unprepared or underprepared for these interactions or relationships?
4. Talk a bit about your work with school and district leaders.
  - a. In what ways do you support the work of these leaders?
  - b. What types of interactions do you have with them?
  - c. In what ways have your prior experiences prepared you to participate in these interactions or relationships?
  - d. In what ways or in what types of situations have you felt unprepared or underprepared for these interactions or relationships?

**Part 4: Wrap-up [5 minutes]**

5. As you move forward in your role as MTSS coordinator, what do you anticipate as the most challenging aspects of this work?
  - a. What do you expect will be the hindrances to your success in these situations?
  - b. What do you expect will be beneficial to your success in these situations?
6. What additional training or support would have you feeling better prepared in general to enact your role as an MTSS coordinator?
7. And what, so far, are the most rewarding aspects of being an MTSS coordinator?

Thank you so much for taking time out of your busy schedule to talk with me today. The information you shared will be very valuable to my study and I look forward to learning more from you. I will see you next on (date of next observation/meeting/interview).

[Stop recording]

## **Interview Protocol #2: MTSS Coordinator**

### **Introduction and Informed Consent [5 minutes]**

Good morning/afternoon. Thank you for meeting with me today.

This is the second of three interviews I will be conducting with you for my doctoral dissertation research about the role of the ISD MTSS coordinator in MiBLSi. You signed an informed consent statement before our first interview. Do you have any questions about your consent, the interview process, or the study? [Pause for questions or to review signed informed consent form]

In the first interview, you described your professional background and preparation for the role of MTSS coordinator, your background with MTSS, and the ways in which you interact with the ISD and district personnel whom you support. In today's interview, I'm going to ask you to discuss more deeply some specific aspects of your practice as an MTSS coordinator.

### **Interview Guide**

[Start recording]

Today is (day/date). This is an interview about the role of the MTSS coordinator in Michigan's Integrated Behavior and Learning Support Initiative – which we'll refer to from here forward as MiBLSi. I am talking with (participant's name), an MTSS coordinator.

[Stop and review recording]

[Start recording]

This interview is structured in three parts. In the first part, we will discuss some specific components of your practice. In the second part, I will ask you to describe the day-to-day work that you do. In the third part, you will share some challenges and successes you've had in MTSS Coordination this year.

### **Part 1: Critical Components of MTSS Coordination [30-45 min]**

We'll use the 7 Critical Components of the MTSS coordinator role as outlined in the Practice Profile as a framework for this part of our conversation. As a reminder, the Critical Components are (in no particular order) [Hand table of these components to MTSS coordinator]:

- Develop and Support Local Training Capacity
- Organize, coordinate, and co-facilitate the work of the ISD and District Implementation Team
- Communicate Effectively
- Develop a Plan for Continuous Learning for Implementation Team Membership and Appropriate Staff
- Guide Problem-solving through data based decision making
- Develop and Support Local Coaching Capacity
- Deepen Personal Knowledge of MTSS data systems, practices, and the implementation research

**Companion Table to Part 1: Critical Components of MTSS Coordination**

<b>Critical Components (From MiBLSi MTSS Coordinator Practice Profile)</b>	<b>Importance</b> 1- not at all important 2- somewhat important 3- very important 4- critically important	<b>Preparation</b> 1- completely unprepared 2- somewhat prepared 3- well prepared 4- highly prepared
Develop and Support Local Training Capacity		
Organize, coordinate, and co-facilitate the work of the ISD and District Implementation Team		
Communicate Effectively		
Develop a Plan for Continuous Learning for Implementation Team Membership and Appropriate Staff		
Guide Problem-solving through data based decision making		
Develop and Support Local Coaching Capacity		
Deepen Personal Knowledge of MTSS data systems, practices, and the implementation research		

As you look at the list of components, please take a moment to indicate how important each one is to your role as MTSS coordinator by marking the first column next to each one with the numbers 1 (not at all important) to 4 (critically important). You can use the same number on more than one component.

Now, in the second column, please indicate how well prepared you feel to enact each component, again using the numbers 1 (completely unprepared) to 4 (very well prepared).

1. Which one or two of these components do you feel are among the most crucial aspects of your role?  
[For each component mentioned]:
  - a. Why is this component important to your work?
  - b. What percentage of your MTSS Coordination work is devoted to this component?
  - c. Please describe, as specifically as possible, the work that you do in this aspect of your role.
  - d. Tell me in detail about a specific situation in which you enacted this component of your role.
  - e. How well prepared do you feel to enact this component of your work, which you have described as critical to your role?
  - f. Tell me about the training and support that MiBLSi has given you that has helped you to enact this component of your work.
  - g. Can you think of anything in your professional background, outside of MiBLSi, that has helped you to prepare for doing this work?
  - h. What kind of additional preparation or support do you think would be helpful for you to better enact this aspect of your MTSS coordinator role?
  
2. For which one or two of these components do you feel you've had the least support or preparation?
  - a. What preparation or support, if any, have you had for this aspect of your work?
  - b. How has your lack of preparation affected your work in this part of your role?
  - c. What kind of preparation do you think would be helpful for you to better enact this component of your role?
  
3. For which one or two of these components do you feel you've been particularly well prepared?
  - a. What preparation have you had for this aspect of your work?
  - b. How has your preparation helped your work in this aspect of your role?
  
4. Are there any of these Critical Components, as they are identified in the Practice Profile, that really aren't part of your work?  
Please elaborate.

5. Are there any aspects of your work that are not on this list, but that you would consider to be Critical Components – something you do that the program designers may not have foreseen when conceptualizing this role?

Please elaborate and share some examples.

## **Part 2: Daily Work [15-20min]**

As we have discussed in the past, I am interested in learning not just about the “performance” aspects of your work – the DIT meetings, for example, that I have been able to observe – but also about the day-to-day lived experiences of an MTSS coordinator. That is, I’d like to know more about what you do on an average day.

1. If you think about a typical day for you, what kinds of MTSS-related tasks do you do?
2. [About each type of task/interaction]Talk a bit more specifically about the typical types of [emails/phone calls/meetings...] you engage in.
  - a. With whom do you interact?
  - b. Who initiates the interaction?
  - c. What is the typical content of the interactions?
  - d. What percentage of your time would you say you spend on this type of task/interaction?
  - e. What training or support have you had through MiBLSi to engage successfully in this type of task/interaction?
  - f. What else in your professional background has prepared you to engage in this type of task/interaction?
  - g. What resources do you draw on for support in this type of daily tasks and interactions?
    - i. How often do you use these resources?
    - ii. How do you access these resources?
    - iii. How did you learn about these resources?
3. Are there resources or supports that you wish were available for your daily work?
4. How do you determine the priorities of your tasks and interactions on a daily basis?

## **Part 3: Challenges and Successes [10 min]**

1. What have been the biggest challenges in your MTSS Coordination work so far?  
[For each situation mentioned]
  - a. What made this situation challenging?
  - b. If you had it to do over, how might that situation have been less challenging for you to deal with?
2. What have been some successful or rewarding aspects of your MTSS Coordination work this year?
3. Do you have anything else to add regarding the topics we’ve talked about today?

Thank you so much for taking time out of your busy schedule to talk with me today. Just as a reminder, we will have one more interview in the spring.

I will see you next on (date of next observation/meeting/interview).

[Stop recording]

### **Interview Protocol #3: MTSS Coordinator**

#### **Introduction and Informed Consent**

Good morning/afternoon. Thank you for meeting with me today.

This is the third and final interview I will be conducting with you for my doctoral dissertation research about the role of the ISD MTSS coordinator in MiBLSi. You signed an informed consent statement before our first interview. Do you have any questions about your consent, the interview process, or the study? [Pause for questions or to review signed informed consent form]

In the first interview, you described your professional background and preparation for the role of MTSS coordinator, your background with MTSS, and the ways in which you interact with the ISD and district personnel whom you support. In the second interview, I asked you to discuss more deeply some specific aspects of your practice as an MTSS coordinator. In this final interview, I will ask you to speak to some of the observations I have made about your work, to reflect on your experiences in this role over the past year, and to make some predictions about your role as you look ahead to next year.

#### **Interview Guide**

[Start recording]

Today is (day/date). This is an interview about the role of the MTSS coordinator in Michigan's Integrated Behavior and Learning Support Initiative – which we'll refer to from here forward as MiBLSi. I am talking with (participant's name), an MTSS coordinator.

[Stop and review recording]

[Start recording]

This interview is structured a bit differently than the previous two interviews. This time, I will share with you some of the observations I have made during my research, and then ask a few follow-up questions about each of them. You will have the opportunity to agree with or push back on my statement, and to provide further details from your experience that will either support or challenge my observation.

The workload for MTSS Coordination is challenging and time-consuming. On top of this work, you carry the responsibilities of (other ISD role).

1. Could you please share whether, and to what degree, you believe this statement to be accurate, based on your experiences?
2. What are some strategies you have used in order to complete the work required of both the ISD MTSS coordinator role and your role as (other ISD role)?
3. Do you feel that you've been able to find a balance or perhaps even a synergy between these two roles?
4. What challenges have you faced in carrying out these two roles simultaneously?
5. How has carrying this dual role impacted your work in either or both of these positions?
6. Do you anticipate this workload and/or time crunch will subside in the future?

MiBLSi has offered support for your work in a variety of ways, including providing a Technical Assistant Partner, monthly online meetings, several statewide trainings, online modules, meeting materials, Practice Profile and more.

1. Could you please share whether, and to what degree, you believe this statement to be accurate, based on your experiences?
2. In retrospect, which aspects of MiBLSi's support have been the most instrumental in developing your capacity as an MTSS coordinator?
3. Did that perspective evolve throughout the year? Were there supports that were helpful in the fall that are no longer as useful to you, or vice versa?

One of the biggest challenges I've observed across districts is the customization of support to local contexts. This has also been identified as a key aspect in increasing local capacity and sustainability of MTSS.

1. Could you please share whether, and to what degree, you believe this statement to be accurate, based on your experiences?
2. What are some of the adaptations you have made to MiBLSi's materials and/or processes for the districts with which you work?
3. How have the decisions as to whether and how to make these adaptations been made? Who weighed in on the customization of the content or process?
4. How will you know whether these adaptations are effective?
5. How have you addressed or considered the tension between meeting a district's specific needs and implementing MTSS with fidelity to the MiBLSi model?

As the project moves forward, responsibility is shifting down the cascading model, so for you, this means having more independent leadership over the ISD and district level support.

1. Could you please share whether, and to what degree, you believe this statement to be accurate, based on your experiences?
2. How do you see your role changing? What will you do differently?
3. How prepared do you feel to continue this work without the continual support of the TAP?
4. What, if anything, are you feeling uneasy about with this shift? In what areas will you continue to seek support?

5. What learning from this year will you take into next year, to improve your practice?

To end, I would like to ask a few more general questions:

1. Have you noticed that participating in this study has provided any benefits or created any challenges for your work?
2. What have been the most challenging aspects of being an MTSS coordinator?
3. What have been the most rewarding or enjoyable aspects of being an MTSS coordinator?
4. What do you look forward to in this work next year?

I cannot thank you enough for your having shared your time and opened your practice to me during this study. What we have been able to learn through you will benefit all ISD MTSS coordinators and the direction of the District Implementation Model in future years. Please contact me if you have any questions, comments, or concerns regarding the study or your participation.

## **APPENDIX B**

### **INTERVIEW PROTOCOL: TAPs**

#### **Interview Protocol #1: Technical Assistance Partner**

##### **Introduction and Informed Consent [15 minutes]**

Good morning/afternoon. Thank you for meeting with me today.

I am a doctoral candidate at the University of Michigan School of Education and I am conducting my dissertation research about the role of the MTSS coordinator in MiBLSi. Over a one-year period, I will be observing MTSS coordination across the state, focusing in particular on the experiences of three MTSS coordinators, including (name of MTSS coordinator), with whom you are working.

There are two primary goals for this interview. The first is to learn about your work as a Technical Assistance Partner in MiBLSi and your preparation for this role. The second is to understand more specifically how you support the work of the ISD MTSS coordinators.

Before beginning, I would like to review with you the procedures for informed consent and, then, give you an opportunity to ask any questions.

[Read through the consent procedures together. Give the interviewee the opportunity to review the form and to ask any questions. If the interviewee chooses to participate, have him/her sign the form and reiterate that they will receive a copy for their records.]

##### **Interview Guide**

[Start recording]

Today is (day/date). This is an interview about the role of the Technical Assistance Partner in supporting MTSS Coordination in Michigan's Integrated Behavior and Learning Support Initiative – which we'll refer to from here forward as MiBLSi. I am talking to (participant's name), a Technical Assistance Partner.

[Stop and review recording]

[Start recording]

This interview is structured in three parts. In the first part, we will discuss your role as Technical Assistance Partner and your professional experiences before joining MiBLSi. In the second part, I'll ask you to talk in some detail about the support you provide to the MTSS

coordinators with whom you work. In the third part, we'll wrap up with some of the challenges and rewards of your TAP work.

### **Part 1: Background/Current Position [15 minutes]**

I'd like to begin by asking you about the roles or positions that you currently hold within MiBLSi and in your ISD, as well as about professional experiences you had prior to becoming a Technical Assistance Partner, or TAP.

1. Tell me about your role as TAP.
  - a. How long have you held this role?
  - b. How did you decide to become a TAP?
  - c. What drew you to this type of work?
  - d. What drew you to this specific opportunity with MiBLSi?
  - e. For which ISDs do you serve as TAP?
2. Now explain to me your role and responsibilities as a TAP within MiBLSi.
  - a. What would you describe as your primary responsibilities in this role?
  - b. Your secondary responsibilities?
  - c. How long have you held these roles?
  - d. Would you please describe your responsibilities in each of these roles?
  - e. How much of your professional time is dedicated to each of these roles?
3. Could you describe your professional experiences before becoming a MiBLSi TAP?
4. Please describe your professional preparation.
  - a. What degrees do you hold?
  - b. Outside of MiBLSi, what other significant professional development experiences have you had, if any, that helped you to prepare for your current roles?

### **Part 2: Supporting the MTSS Coordinators [20-30 minutes]**

8. How would you characterize the professional relationship you have with the MTSS coordinators you are supporting?
9. As I understand it, MTSS coordinators work in three directions: upward, laterally, and downward. The upward work is your interface with ISD leaders and other stakeholders in MiBLSi and in your ISD. The lateral work is the management of your ISD Implementation Team. The downward work is your interaction with district and school leaders. Is that an accurate characterization?
10. First, let's talk about the upward interactions, with the MiBLSi and ISD stakeholders. In what ways do you support the MTSS coordinators' interactions at this level?
11. And how do you support the MTSS coordinators' work with their ISD Implementation Teams?
12. Please talk a bit about your support of their work with school and district leaders.
13. In which of these directions – upward, lateral, or downward – do you perceive the MTSS coordinators as needing the most intensive support?
  - a. Why do you think this is the most challenging type of interaction for them?

- b. How have you supported them in these interactions?
  - c. What are some ways in which MiBLSi might improve the MTSS coordinators' preparation for these interactions?
14. One of the goals of MiBLSi is not only to directly support the current work of the ISD MTSS coordinators but also to build their capacity to continue this work more independently.
- a. What do you do to move your MTSS coordinators toward this goal?
  - b. In your opinion, what is the readiness level of the MTSS coordinators to continue this work independently?
  - c. In what ways do you think this scaffolding could be better designed or enacted?

**Part 3: Wrap-up [5 minutes]**

1. What have been the most challenging aspects of supporting the MTSS coordinators?
2. What are some ways in which the MTSS coordinators could be better prepared for and/or supported in their role?
3. What have been the most rewarding aspects of supporting the MTSS coordinators?
4. Is there anything you'd like to add to our conversation today?

Thank you so much for taking time out of your busy schedule to talk with me today. The information you shared will be very valuable to my study and I look forward to learning more from you. I will see you next on (date of next observation/meeting/interview).

[Stop recording]

## **APPENDIX C**

### **INTERVIEW PROTOCOLS: MiBLSi CORE TEAM**

#### **Interview Protocol #1: MiBLSi Leadership Team**

Good morning. Thank you for meeting with me today.

I am a doctoral candidate at the University of Michigan School of Education and I am conducting my dissertation research about the role of the MTSS coordinator in MiBLSi. Over a one-year period, I will be observing MTSS coordination across the state, focusing in particular on the experiences of three MTSS coordinators.

There are three goals for this interview. The first is to learn a little bit about your role and your work as [title] in MiBLSi. The second is to begin to understand your conceptualization of MTSS and the work that you expect the MTSS coordinators to do. The third is to start to gain a sense of the readiness of the MTSS coordinators to enact this role.

Before beginning, I would like to review with you the procedures for informed consent and, then, give you an opportunity to ask any questions.

[Read through the consent procedures together. Give the interviewee the opportunity to review the form and to ask any questions. If the interviewee chooses to participate, have him/her sign the form and reiterate that they will receive a copy for their records.]

#### **Interview Guide**

[Start recording]

Today is [date]. This is an interview about the role of the MTSS coordinator in Michigan's Integrated Behavior and Learning Support Initiative – which we'll refer to from here forward as MiBLSi. I am talking to [name & title].

[Stop and review recording]

[Start recording]

This interview is structured in three parts. In the first part, we will discuss your role as [title] and your professional experiences before joining MiBLSi. In the second part, we will talk about how you expect MTSS coordinators to conceptualize MTSS. In the third part, we will discuss the preparation of MTSS coordinators to carry out their role.

### **Part 1: Background [10 minutes]**

I'd like to begin by asking you about the roles or positions that you currently hold within MiBLSi and in your ISD, as well as about professional experiences you had prior to becoming [title].

6. Tell me about your role as MiBLSi's [title].
  - a. How long have you held this role?
  - b. How much of your professional time is dedicated to your MiBLSi [title] role?
  - c. How did you decide to become MiBLSi's [title]?
  - d. What drew you to this type of work?
  - e. What drew you to this specific opportunity with MiBLSi?
7. What are your other current roles or positions in your ISD, if any?
  - a. How long have you held these roles?
  - b. How much of your professional time is dedicated to each of these roles?
  - c. Would you please briefly describe your responsibilities in each of these roles?
8. Could you describe your professional experiences before joining MiBLSi?
9. Please describe your professional preparation.
  - a. What degrees do you hold?
  - b. Outside of MiBLSi, what other significant professional development experiences have you had, if any, that helped you to prepare for your professional roles?

### **Part 2: Understanding of MTSS [20-30 minutes]**

I'd like to spend some time talking about what you envision for MTSS coordinators.

6. What types of prior experience with MTSS do you expect or prefer MTSS coordinators to have had prior to entering this role?
7. What type of training do the MTSS coordinators ideally receive in MTSS, both within and beyond MiBLSi?
8. Imagine that I am an educator who is unfamiliar with the MTSS model. How would you expect an MTSS coordinator to describe MTSS to me?
9. How would you hope that the MTSS coordinators would describe their understanding of MiBLSi as an initiative to this educator?
10. And how do you imagine they would explain to this educator their role and responsibilities as an MTSS coordinator within MiBLSi?

### **Part 3: Readiness for MTSS Coordinator Role [20-30 minutes]**

15. As I understand it, MTSS coordinators work in three directions: upward, laterally, and downward. The upward work is their interface with supervisors and other stakeholders in MiBLSi and in their ISD. The lateral work is the management of their ISD Implementation Team. The downward work is their interaction with district and school leaders. Is that an accurate characterization?
16. First, let's talk about their upward interactions, with the MiBLSi and ISD leadership.

- a. What types of interactions do MTSS coordinators have in these relationships?
  - b. In what ways do you expect the MTSS coordinators' prior experiences to have prepared them to participate in these interactions or relationships?
  - c. In what ways or in what types of situations do you envision that the MTSS coordinators might be unprepared or underprepared for these interactions or relationships?
17. In working with their ISD Implementation Teams:
- a. What types of interactions do you expect MTSS coordinators to have at this level?
  - b. In what ways do you expect the MTSS coordinators' prior experiences to have prepared them to participate in these interactions or relationships?
  - c. In what ways or in what types of situations can you envision that the MTSS coordinators might be unprepared or underprepared for these interactions or relationships?
18. Talk a bit about the MTSS coordinators' work with school and district leaders.
- a. In what ways do you expect the MTSS coordinators to support the work of these leaders?
  - b. What types of interactions do you expect MTSS coordinators to have at this level?
  - c. In what ways do you expect the MTSS coordinators' prior experiences to have prepared them to participate in these interactions or relationships?
  - d. In what ways or in what types of situations can you envision that the MTSS coordinators might be unprepared or underprepared for these interactions or relationships?

**Part 4: Wrap-up [5 minutes]**

1. As the MTSS coordinators move forward in their role, what do you anticipate as the most challenging aspects of supporting them in this work?
  - a. What do you expect will be the hindrances to success in these situations?
  - b. What do you expect will be beneficial to success in these situations?
2. What plans, if any, are in place for improving MiBLSi's support of MTSS coordinators?
3. And what, so far, have been the most rewarding aspects of supporting MTSS coordinators in their work?

Thank you so much for taking time out of your busy schedule to talk with me today. The information you shared will be very valuable to my study and I look forward to learning more from you.

[Stop recording]

## **Interview Protocol #2: MiBLSi Leadership Team**

[Start recording]

Good morning/afternoon. Thank you for meeting with me today.

[Stop and review recording]

This is the second and final interview I will be conducting with you for my doctoral dissertation research about the role of the ISD MTSS coordinator in MiBLSi. You signed an informed consent statement before our first interview. Do you have any questions about your consent, the interview process, or the study? [Pause for questions or to review signed informed consent form]

In the first interview, you described your professional background and preparation for the role of (MiBLSi role), you shared your conceptualization of MTSS and the MiBLSi model, and you talked about MiBLSi's expectations from and support for ISD MTSS coordinators. In the second interview, I will ask you to reflect on your experiences in this role over the past year, to speak to some of the observations I have made about your work, and to make some predictions about your role as you look ahead to next year.

### **Interview Guide**

[Start recording]

Today is (day/date). This is an interview about the role of the MTSS coordinator in Michigan's Integrated Behavior and Learning Support Initiative – which we'll refer to from here forward as MiBLSi. I am talking with (participant & role).

This interview is structured a bit differently than the previous interview. This time, I will share with you some of the observations I have made during my research, and then ask a few follow-up questions about each of them. You will have the opportunity to agree with or push back on my statement, and to provide further details from your experience that will either support or challenge my observation.

One thing I've observed over the past year is that using feedback to continually improve the design and enactment of the MTSS model is an important element of the MiBLSi project.

1. What are some of your thoughts on this observation?
2. In what ways have you, as a project, gathered feedback from partners?
3. What type of feedback do you seek to collect?
4. Once you have the feedback, what do you, as a project team, do with it? How do you process it and in what ways do you act or have you acted upon it?

I am aware that there are a number of important changes in store for implementing the MiBLSi model at the ISD and district level for the upcoming year.

1. Could you please describe these changes?
2. Can you elaborate on some of the most important or impactful changes?
3. What motivated these developments?
4. How did the project team go about developing these redesign plans?
5. What do you anticipate will be different in terms of outcomes, based on these changes, and how will you monitor that?
6. How will MiBLSi partners, such as ISD MTSS coordinators, be supported in implementing these changes?

Speaking of ISD MTSS coordinators, their role will be shifting next year, as those in DC2 take on more independent leadership while their districts move into the next phases of implementation, and as those in DC3 step into on-the-ground installation work with districts.

1. In what specific ways do you see the DC2 Coordinators' role evolving from this year to next year?
2. In what areas do you anticipate the MTSS coordinators in DC2 will need support as they move forward? How does MiBLSi plan to offer that support?
3. In what specific ways, if any, do you expect the district level installation work and the role of the MTSS coordinator to evolve from DC2 to DC3? What will have informed that development?

One of the biggest challenges I've observed across districts is the customization of support to local contexts. This has also been identified as a key aspect in increasing local capacity and sustainability of MTSS.

6. What have been your observations or experiences with the customization of the model?
7. How have you, as a project, supported the adaptation of MiBLSi's materials and/or processes by ISD MTSS coordinators, for the districts with which they work?
8. How do you know when adaptations have been made?
9. How do you monitor the effectiveness of these adaptations?
10. How have you addressed or considered the tension between meeting a district's specific needs and implementing MTSS with fidelity to the MiBLSi model?

MiBLSi has offered support for MTSS coordinators in a variety of ways, including providing a Technical Assistant Partner, monthly online meetings, several statewide trainings, online modules, meeting materials, Practice Profile and more.

4. Could you please share your thoughts on this system of supports?
5. From your perspective, which aspects of MiBLSi's support have been the most instrumental in developing the capacity of the ISD level MTSS coordinators?
6. Did that perspective evolve throughout the year? Were there supports that were helpful in the fall that are no longer as relevant, or vice versa?
7. What will support for MTSS coordinators look like next year? How did you decide to make those adaptations?

8. What do you expect to be the outcome of any adaptations you've made to the training and support model? How will you monitor their effectiveness?

It is apparent that the ISD level MTSS coordinator role is pivotal in the successful implementation of the MiBLSi model.

1. What are your thoughts on the importance of this role?
2. Can you describe why this role is so critical to the model?
3. How was this role first conceptualized by the MiBLSi team?
4. How does the role in practice compare to the team's vision for its enactment?

To end, I would like to ask a few more general questions:

Have you noticed that participating in this study has provided any benefits or created any challenges for your work?

1. What have been the most challenging aspects of supporting the work of MTSS coordinators?
2. What have been the most rewarding or enjoyable aspects of supporting the work of MTSS coordinators?
3. What do you look forward to in this work next year?

I cannot thank you enough for your having shared your time and opened your practice to me during this study. What we have been able to learn through you will benefit the ISD MTSS coordinators and the direction of the District Implementation Model in future years. Please contact me if you have any questions, comments, or concerns regarding the study or your participation.

**Interview Protocol: MiBLSi Leadership Team**  
**Dr. Steve Goodman – Director**

[Start recording]

Good morning. Thank you for speaking with me today.

[Stop and review recording]

As you know, I am a doctoral candidate at the University of Michigan School of Education and I am conducting my dissertation research about the role of the MTSS coordinator in MiBLSi. Over a one-year period, I have been observing MTSS coordination at the ISD level across the state, focusing in particular on the experiences of three MTSS coordinators.

There are three goals for this interview. The first is to learn a little bit about your background, as well as your work as Director in MiBLSi. The second is to begin to understand your conceptualization of MTSS and the work that you expect the MTSS coordinators to do. The third is to start to gain a sense of the readiness of the MTSS coordinators to enact this role.

Before beginning, I would like to review with you the procedures for informed consent and, then, give you an opportunity to ask any questions.

[Read through the consent procedures together. Give the interviewee the opportunity to review the form and to ask any questions. If the interviewee chooses to participate, have him/her sign the form and reiterate that they will receive a copy for their records.]

### **Interview Guide**

[Start recording]

Today is Monday, June 30, 2014. This is an interview about the role of the MTSS coordinator in Michigan's Integrated Behavior and Learning Support Initiative – which we'll refer to from here forward as MiBLSi. I am talking to Dr. Steve Goodman, MiBLSi's Director.

This interview is structured in three parts. In the first part, we will discuss your role as MiBLSi Director and your professional experiences before joining MiBLSi. Next, we will talk about your conceptualization of MiBLSi and its development as a project so far. To wrap up, we will discuss the direction that MiBLSi is headed.

I'd like to begin by asking you about your current role as MiBLSi Director, as well as about professional experiences you had prior to this role.

1. Tell me about your role as MiBLSi's Director.
  - a. How long have you held this role?
  - b. What are your responsibilities as MiBLSi's Director?
2. Could you describe your professional experiences before joining MiBLSi?
3. Please describe your professional preparation.
  - a. What degrees do you hold?
  - b. Outside of MiBLSi, what other significant professional development experiences have you had, if any, that helped you to prepare for your professional roles?

Let's continue by diving a bit into the foundations of MiBLSi and your interest in MTSS.

1. What drew you into this type of work?
  - a. Why did you decide to enter the School Improvement field?
  - b. What is it that attracted you to MTSS (or RtI) in particular?
  - c. How did you come up with the concept of MiBLSi? What planted that seed?
2. Logistically, how did you get the MiBLSi grant going? What was the process for getting started?
3. What did the original design for MiBLSi look like? What was the planned trajectory at that point?
4. Please describe how the project has evolved over the years.
  - a. How did MiBLSi land on its current iteration?

- i. What about the current model is strong?
- ii. What about the current model still needs work?
  1. What are you, as a project, doing to improve it?

My study focuses specifically on ISD MTSS coordinators – a role that has been identified as pivotal in the successful implementation of the MiBLSi model.

1. Can you describe why this is such an important role?
2. How do you see the role of the MTSS coordinator evolving within DC2, from this year to next year?
3. How do you envision this role evolving from DC2 to DC3?
  - a. What has led to these role revisions?

I'm aware of a number of important changes in store for implementing the MiBLSi model at the ISD and district level for the upcoming year.

1. Could you please share whether, and to what degree, you believe this statement to be accurate, based on your experiences?
2. Can you describe some of the most important or impactful changes?
3. What motivated these developments?
4. How did the project team go about developing these redesign plans?
5. What do you anticipate will be different in terms of outcomes, based on these changes, and how will you monitor that?
6. How will MiBLSi partners, such as ISD MTSS coordinators, be supported in implementing these changes?

Now, thinking bigger picture and longer term...

1. What's down the pike for MiBLSi over the next 3 years or so?
2. What concerns do you have or challenges do you foresee as the project moves forward?
3. What is your ultimate vision for MiBLSi and for MTSS in Michigan? What will it look like when your work is "done"?

I cannot thank you enough for your having shared your time and opened MiBLSi's practice to me during this study. I expect that what we have been able to learn through this study will benefit the ISD MTSS coordinators and the direction of the District Implementation Model in future years. Please contact me if you have any questions, comments, or concerns regarding the study or your participation.

## APPENDIX D

### MTSS COORDINATOR PRACTICE PROFILE

#### What is a Practice Profile?

Practice Profiles provide a detailed description of the necessary features for a given role. They are based off of the work of the Hall and Hord (2010) and the National Implementation Research Network (NIRN).

Benefits of using Practice Profiles include (NIRN, 2011):

- Clearly and consistently define a job role
- Allows for deeper knowledge and understanding of the role
- De-Personalizes Feedback: the conversation can be focused on the critical components of the job role
- Allows acknowledgement of components that need support
- Provides ground work for functional “reflective” supervision

#### What are the Essential Components of a Practice Profile?

Critical Component (non-negotiable)	Ideal “Gold Standard”	Acceptable Variation	Unacceptable Variation	Harmful Variation
A critical component is a broad category of work. Related to a specific job/role, critical components include the big ideas you would cover if someone asked you to briefly describe your job. Many of the critical components	The Ideal “Gold Standard” column includes a detailed description of the work or performance. The Ideal “Gold Standard” can be accomplished under ideal conditions and establishes a mark for which to strive.	The Acceptable Variation column includes a detailed description of the work or performance that is still appropriate and acceptable, but does not quite meet the Gold Standard. There are many reasons why performance may fall into the Acceptable Variation column, many of which could be outside of an individual’s control.	The Unacceptable Variation column includes a detailed description of the work or performance that is outside of the Acceptable Variation range. The Unacceptable Variation will likely impede implementation efforts.	The Harmful Variation column includes a detailed description of the work or performance that is detrimental to implementation efforts.

are standard across multiple roles.				
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**MTSS/RtI Coordinator Practice Profile**

**Project (MTSS/RtI) Vision:** MiBLSi creates capacity for an integrated Behavior and Reading MTSS system that can be implemented with fidelity, is sustainable over time and utilizes data-based decision making at all levels of implementation support.

**MTSS Coordinators Contribute to the MTSS Vision by:**

- Developing effective practices through a continuum of supports: training, coaching, leadership, evaluation, and organizational system that are supported by evidence. Practices and supports integrate the implementation research and address all levels within the cascading model of support.
- Evaluating the effectiveness and efficiencies of the above continuum of supports through a continuous improvement cycle at all levels.

<b>Critical Component (non-negotiable)</b>	<b>Ideal “Gold Standard”</b> <i>All items within the category are in place</i>	<b>Acceptable Variation</b> <i>A description of work here takes the place of the related Gold Standard</i>	<b>Unacceptable Variation</b> <i>One or more item(s) is occurring</i>	<b>Harmful Variation</b> <i>One or more item(s) is occurring</i>
<p><b>Organize, coordinate and co-facilitate, and the work of the ISD and District Implementation Team</b></p> <p><b>Description of the Critical Component</b>  <i>(communicated and used in job description)</i></p> <ul style="list-style-type: none"> <li>• Provides assistance in developing the infrastructures necessary for district-wide MTSS implementation (Implementation Team composition, work)</li> <li>• Provides leadership around the development of a MTSS implementation work plan to support local districts and buildings within those districts</li> </ul>	<p>Collaborates with the Liaison to identify Implementation Team membership (See the Implementation Team Practice Profile for additional information.)</p> <p>Once team membership is solidified, the MTSS coordinator develops in collaboration with key team members (as appropriate) a meeting schedule for future team meeting dates. The schedule is disseminated to the group in a timely basis. The Implementation Team is aware that additional Implementation Team</p>	<p>The Liaison, in conjunction with the cabinet, pre-identifies Implementation Team membership based on the information they had readily available. As the scope of the Implementation Team’s work becomes clearer team membership may need to be altered to support the implementation plan. The MTSS coordinator works collaboratively with the Liaison to discuss team member selection criteria and whether membership needs to be altered. Changes to team membership are facilitated by the Liaison.</p> <p>A meeting schedule is developed incrementally that includes the first few meetings (3-4). The schedule is disseminated to the group. Additional Implementation Team meetings are added as needed early enough so team members have adequate prior notice.</p>	<p>The MTSS coordinator attempts to identify the appropriate people to participate on the Implementation Team. Consequently, team membership appears to fluctuate on a regular basis because existing members are not meeting the necessary functions of the Implementation . Individuals are prematurely asked to attend (or not attend) meetings before subsequent meetings. This pattern occurs until the MTSS coordinator feels the composition of the team feels right.</p> <p>Meeting schedules are created but not adequately communicated to all team members resulting in variations in dates and times for Implementation Team meetings across team membership.</p>	<p>The MTSS coordinator notices the Implementation Team membership appears to be too large and/or generally unsupportive of the work. Consequently, the collective team is not focused on the development and implementation of a MTSS implementation support plan. Due to a variety of circumstances (e.g. a desire to consolidate existing meeting structures) the team composition remains the same primarily to benefit the MTSS coordinator’s existing responsibilities/schedule.</p> <p>Meeting schedules are established however, dates are cancelled due to other commitments and/or team members are frequently absent due to scheduling conflicts. The MTSS coordinator is not engaging in formal problem solving with the Liaison to solidify meeting dates and team attendance.</p>

<b>Critical Component (non-negotiable)</b>	<b>Ideal “Gold Standard”</b> <i>All items within the category are in place</i>	<b>Acceptable Variation</b> <i>A description of work here takes the place of the related Gold Standard</i>	<b>Unacceptable Variation</b> <i>One or more item(s) is occurring</i>	<b>Harmful Variation</b> <i>One or more item(s) is occurring</i>
	<p>meetings may occur, with enough prior notice, in between designated dates depending on the level of work needed that is identified in the MTSS implementation work plan.</p>		<p>Communication of meetings may occur by having people access calendars prior to the start of a meeting causing team members who are not present or did not have access to their calendar the opportunity to solidify dates. There is not additional, formal communication about dates until a conflict in dates occurs.</p>	
	<p>One week before scheduled Implementation Team meetings, the MTSS coordinator meets with the Liaison to identify relevant agenda items for the upcoming meetings. Activities associated with those agenda items are assigned to appropriate Implementation Team members (which could also include the MTSS coordinator and Liaison) well in advance of the meeting.</p> <p>Two days prior to the scheduled meeting, the MTSS coordinator communicates with Implementation Team members who have assigned tasks separately to review</p>			<p>Individual meetings are scheduled with little advanced notice (one week) causing team membership to be inconsistent due to scheduling conflicts.</p>

<b>Critical Component (non-negotiable)</b>	<b>Ideal “Gold Standard”</b> <i>All items within the category are in place</i>	<b>Acceptable Variation</b> <i>A description of work here takes the place of the related Gold Standard</i>	<b>Unacceptable Variation</b> <i>One or more item(s) is occurring</i>	<b>Harmful Variation</b> <i>One or more item(s) is occurring</i>
	<p>progress and to gather the necessary information that has been completed for the meeting.</p>			
	<p>The Implementation Team institutes effective meeting structures and the MTSS coordinator develops consensus amongst team members for agreeing on norms for collaboration, assigning necessary roles and responsibilities (e.g. meeting facilitator, recorder, time keeper, data keeper). The agreed upon processes, roles and responsibilities are utilized consistently and effectively.</p> <p>The MTSS coordinator facilitates a process where team members have opportunities to reflect on the adherence of meeting structures, roles, responsibilities, and norms in an effort to progress monitor the effectiveness of the Implementation Team’s time in accomplishing the necessary tasks/activities to support implementation efforts.</p>	<p>Some essential meeting structures are immediately implemented (assigning roles and responsibilities for the facilitator and recorder) but not all roles and responsibilities are assigned until the work of the Implementation Team becomes clearer (e.g. what data needs to be brought to the meeting for a data keeper role; time keeper).</p>	<p>Effective meeting structures are established but not adhered to during the course of the meetings causing the following ramifications:</p> <ul style="list-style-type: none"> <li>• Agenda items to be tabled because the allotted time did not accommodate the agenda items</li> <li>• Lack of clarity around decisions that were made during previous meetings until the MTSS coordinator recalls the discussion and reminds the group of the decisions that were made</li> <li>• Data reports necessary for the</li> </ul>	<p>Effective meeting structures are in place however; the roles and responsibilities reside with the MTSS coordinator (e.g. facilitator, recorder, time keeper) sending the appearance that the MTSS coordinator is the sole leader of the Implementation Team.</p> <p>Lack of role distribution lead to the team deferring to the MTSS coordinator for decision making and direction rather than collectively demonstrating shared ownership for supporting MTSS implementation efforts.</p> <p>Effective meeting structures are not in place (norms, facilitator, time keeper, recorder, data provider) causing the meetings to feel unproductive and are potentially a waste of time. These feelings cause the level of enthusiasm for supporting implementation efforts to quickly diminish.</p>

<b>Critical Component (non-negotiable)</b>	<b>Ideal “Gold Standard”</b> <i>All items within the category are in place</i>	<b>Acceptable Variation</b> <i>A description of work here takes the place of the related Gold Standard</i>	<b>Unacceptable Variation</b> <i>One or more item(s) is occurring</i>	<b>Harmful Variation</b> <i>One or more item(s) is occurring</i>
			<p>meeting have to be generated during the meeting</p> <p>To accommodate these issues, the MTSS coordinator schedules additional meetings so the necessary work can be accomplished.</p>	
	<p>Following the Implementation Team meetings, the MTSS coordinator works with team members who have been assigned action items to ensure:</p> <ul style="list-style-type: none"> <li>• Necessary supports are provided</li> <li>• Activities are progressing towards completion</li> <li>• Activities are completed within the teams agreed upon timelines.</li> </ul> <p>When it is anticipated that action items may not be completed on time, the Liaison and MTSS coordinator to discuss whether the timelines and activities are realistic given the other responsibilities of Implementation Team members. Possible solutions for removing existing responsibilities will need to be discussed and</p>	<p>The MTSS coordinator requests action items and other assignments for team members at least 2-3 days prior to the next meeting. Action items that are unable to be completed will require the Liaison and MTSS coordinator to identify whether timelines are appropriate given the other responsibilities of the Implementation Team members. Possible solutions for removing existing responsibilities will be discussed and ultimately left to the Liaison for consideration.</p>	<p>Action items are followed-up on during the Implementation Team meeting. Action items that are not completed are tabled for the next agenda for a status report.</p>	<p>Action items are unclear to team members causing follow-up to be challenging. Time for follow-up regarding action items is done during the allotted meeting time.</p> <p>Follow-up occurs either shortly before the meeting or during the meeting.</p>

<b>Critical Component (non-negotiable)</b>	<b>Ideal “Gold Standard”</b> <i>All items within the category are in place</i>	<b>Acceptable Variation</b> <i>A description of work here takes the place of the related Gold Standard</i>	<b>Unacceptable Variation</b> <i>One or more item(s) is occurring</i>	<b>Harmful Variation</b> <i>One or more item(s) is occurring</i>
	<p>ultimately left to the Liaison for consideration.</p> <p>A system for managing the complexity of tasks and proactively determining indicators of risk that might prevent work to be completed is established and implemented in a consistent way.</p>			
	<p>The MTSS coordinator gathers the necessary building level data, tools and resources and prior to the Implementation Team meeting.</p> <p>The MTSS coordinator has a preliminary idea of the necessary building level supports within the local school districts (“Should we do it/Why are we doing it”; “Work to do it right”; “Work to do it better). The preliminary work is shared with the Liaison prior to the Implementation Team meeting and during that time adjustments are made where needed.</p> <p>The Liaison and MTSS coordinator discuss the possible benefits and risks for supporting the buildings from districts that are included in each of the categories. The benefits and risks discussed are documented and prepared to share with the rest of the Implementation Team</p>	<p>The MTSS coordinator gathers the tools, resources, and preliminary data needed to begin determining the necessary building level supports needed across districts.</p> <p>Prior to the meeting, the MTSS coordinator has a general sense of which focus areas buildings across districts will be placed. During the meeting, implementation Team members work in groups and divide amongst themselves the school data to review. They agree to identify which focus category the schools will be placed. Once groups have an opportunity to complete their tasks, the collective group reconvenes and shares their findings with the team.</p>	<p>The MTSS coordinator identifies the level of supports school buildings across districts need using informal data (perception, observational, anecdotal data from coaches or principals) rather than using program quality and outcome data sources.</p> <p>The plan is presented to the Implementation Team and the group identifies potential inconsistencies with the supports that have been drafted. Consequently, the team determines to work on the plan in between meetings so a draft of a plan can be finalized</p>	<p>Thoughtful time and consideration in identifying the level of supports for buildings across districts has not been provided. Consequently, assumptions are made about the level of implementation and fidelity of that implementation across buildings for partnering districts. Information about previous work the buildings have engaged in (e.g. building has a RtI/MTSS manual for K-2; building has been a previous MiBLSi cohort) is used to determine the level of supports rather than additional data sources like program quality or outcome data. Team members may not have adequate time to review the focus area where schools have placed. Consequently, the MTSS coordinator assumes primary responsibility for finalizing the draft of the plan and presenting it to the Liaison. The system of checks and balances for ensuring</p>

<b>Critical Component (non-negotiable)</b>	<b>Ideal “Gold Standard”</b> <i>All items within the category are in place</i>	<b>Acceptable Variation</b> <i>A description of work here takes the place of the related Gold Standard</i>	<b>Unacceptable Variation</b> <i>One or more item(s) is occurring</i>	<b>Harmful Variation</b> <i>One or more item(s) is occurring</i>
	<p>along with the draft of the schools that fall within each of those categories. During the meeting, the MTSS coordinator shares the information with the team and gathers input from the group about the accuracy of the buildings who are categorized within the focus areas, benefits, and risks for supporting the schools.</p> <p>Suggestions are taken into consideration and adjustments are made in a timely way and presented to the group for a final review. When ready, the Liaison takes the plan to the cabinet for review and approval. Once approval is provided, the Liaison communicates approval to the MTSS coordinator who in turn, communicates the information to Implementation team membership.</p>	<p>Members of the team provide input and necessary changes that need to be made are done so during that time. By the conclusion of the meeting, the Implementation Team has finalized a draft of the Implementation Support Plan for the Liaison to take to the cabinet for review and approval. Once approval is granted, the Liaison notifies the MTSS coordinator who in turn, notifies the Implementation Team.</p>	<p>at the next Implementation Team meeting. The delay causes the overall timeline to be elongated (presentation to cabinet, communication to districts, formal planning for implementing the plan by team members, etc.).</p>	<p>the information is accurate and timely is absent from this process.</p>
<p><b>Develop and Support Local Training Capacity</b></p> <p><i>Description of the Critical Component (communicated and used in job description)</i></p> <ul style="list-style-type: none"> <li>Develops a plan for recruitment, selection, and development for local training capacity</li> </ul>	<p>The MTSS coordinator provides a draft of the recruitment and selection criteria for developing local training capacity to the Implementation Team for input and review. Some examples for recruitment and selection criteria are as follows:</p> <ul style="list-style-type: none"> <li>Allocated FTE to participate in trainer skill development opportunities, to</li> </ul>	<p>Collaborates with the Implementation Team to determine recruitment and selection criteria for local trainers. Some examples for recruitment and selection criteria are as follows:</p> <ul style="list-style-type: none"> <li>Allocated FTE to participate in trainer skill development opportunities, to adequately prepare prior to</li> </ul>		<p>The MTSS coordinator identifies local trainers without taking into consideration the recruitment or selection criteria and as a result, local trainers who do not meet all of the criteria are identified as trainers.</p> <p>The MTSS coordinator presents the list of trainers to the Implementation Team in the absence of a discussion around</p>

<b>Critical Component (non-negotiable)</b>	<b>Ideal “Gold Standard”</b> <i>All items within the category are in place</i>	<b>Acceptable Variation</b> <i>A description of work here takes the place of the related Gold Standard</i>	<b>Unacceptable Variation</b> <i>One or more item(s) is occurring</i>	<b>Harmful Variation</b> <i>One or more item(s) is occurring</i>
<ul style="list-style-type: none"> <li>Develops local trainer competency in an on-going way through supports provided before, during, and after training events</li> </ul>	<p>adequately prepare prior to the training, and to deliver training on scheduled dates</p> <ul style="list-style-type: none"> <li>Philosophically aligned with the research base</li> <li>Capacity to provide professional development to adult learners</li> <li>Necessary skill set to understand the theory and research behind the training content as well as ability to provide examples of research applied to practice</li> </ul>	<p>the training, and to deliver training on scheduled dates</p> <ul style="list-style-type: none"> <li>Philosophically aligned with the research base</li> <li>Capacity to provide professional development to adult learners</li> <li>Necessary skill set to understand the theory and research behind the training content as well as ability to provide examples of research applied to practice</li> </ul>		<p>benefits and risks causing Implementation Team members to feel as though their input and concerns about the identified trainers are irrelevant.</p>
	<p>The MTSS coordinator <i>gathers information</i> about local training capacity and a preliminary audit is completed to ensure sufficient capacity exists to train across topics (e.g., reading, behavior, across Tiers I to III). The results are compiled and presented to the Implementation Team for review, confirmation, alternate suggestions, etc. Where local training capacity does not currently exist, specific action planning takes place with the Implementation Team to ensure the development of local capacity is embedded in the implementation plan.</p>	<p><i>Collaborates with</i> the Implementation Team to complete an audit that would determine the needs for local training capacity to ensure sufficient capacity exists to train across topics (e.g., reading, behavior, across Tiers I to III). Where local training capacity does not currently exist, specific action planning takes place with the Implementation Team to ensure the development of local capacity and is embedded in the implementation support plan.</p>	<p>The MTSS coordinator completes an audit and independently determines the needs for local training capacity to ensure sufficient capacity exists to train across topics (e.g., reading, behavior, across Tiers I to III) without input and consideration from the Implementation Team.</p>	<p>When local district employees are identified as potential trainers, the MTSS coordinator approaches the individuals directly without obtaining prior approval from the district Liaison.</p>

<b>Critical Component (non-negotiable)</b>	<b>Ideal “Gold Standard”</b> <i>All items within the category are in place</i>	<b>Acceptable Variation</b> <i>A description of work here takes the place of the related Gold Standard</i>	<b>Unacceptable Variation</b> <i>One or more item(s) is occurring</i>	<b>Harmful Variation</b> <i>One or more item(s) is occurring</i>
	<p>Using developed recruitment and selection criteria, the MTSS coordinator identifies potential trainers. If local district employees are identified as potential trainers, the Liaison and MTSS coordinator meet with the District Liaison to obtain prior approval before approaching the potential local trainer(s). Once the list of potential trainers has been identified, the list should become part of the implementation support plan that will ultimately require cabinet approval via the Liaison.</p>		<p>Action planning to develop local training capacity is not addressed in the implementation support plan.</p>	<p>A training schedule is created however, a decision regarding which topics and which stakeholders should attend the trainings is left to the discretion of the MTSS coordinator and is inconsistent with the MTSS support model and implementation research. Team based training tends to be the main focus leaving other essential stakeholder supports out (e.g. trainers, coaches, leaders, etc.).</p>
	<p>A local training schedule that aligns with the training windows and topics identified in the Implementation Support Plan is developed well in advance (preferably the spring prior to the next academic school year but if not possible, then 3-4 months in advance) that includes dates and topics for the following stakeholders:</p> <ul style="list-style-type: none"> <li>• Building leadership team trainings specific to the MTSS area of focus (e.g. reading, behavior, Tiers I, II, or III)</li> <li>• Local content expertise (e.g. specific staff</li> </ul>		<p>A local training schedule is developed that includes dates and topics outlined in the “Ideal ‘Gold Standard’” column. The schedule is disseminated too close to the scheduled training dates (1-2 months) and consequently, frustration from building teams occurs causing schedules to be adjusted in a short amount of time. This may result in low attendance at the various events (team</p>	<p>Action planning for trainers relies on “purchasing” training support (e.g., trainers) without any consideration for developing local capacity.</p>

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	<p>training that provides competency development around the MTSS practices (e.g. FBA training, grade level specific reading training)</p> <ul style="list-style-type: none"> <li>Principals who are leading the implementation of MTSS data, systems, and practices</li> <li>District Implementation Teams who are coordinating and supporting the implementation of the MTSS data, systems and practices</li> </ul>		<p>based trainings, coaching trainings, etc.).</p>	
	<p>Trainer support days are scheduled with sufficient time (e.g., at least 3-4 weeks before the scheduled training day) based on the training schedule and are also included in the implementation support plan. To ensure deepening of the content knowledge, one day of trainer support per one day of training is necessary. If needed, additional days and supports may be provided.</p>	<p>Trainer support days are scheduled with minimal time (e.g. less than 3 weeks) prior to the training schedule and are also included in the implementation support plan. To ensure deepening of the content knowledge, one day of trainer support per one day of training is necessary. If needed, additional days and supports may be provided.</p>	<p>Trainer support days are scheduled a week or less prior to the scheduled training and are also included in the implementation support plan.</p> <p>Less than 1 day of trainer support per training topic is provided.</p>	<p>Trainer support days are not scheduled prior to the scheduled training and as a result, trainers are left on their own to prepare for training.</p> <p>Trainer support days are not included in the implementation support plan.</p>
	<p>Trainer support days are facilitated by the MTSS coordinator when the MTSS coordinator has thorough background</p>	<p>Trainer support days are co-facilitated by the MTSS coordinator and an additional trainer who has deep</p>	<p>The MTSS coordinator relies on others to facilitate trainer support days and does</p>	<p>Trainer support days are not scheduled prior to the scheduled training and as a result, trainers are left on their own to prepare for</p>

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	<p>knowledge around the data, systems, and practices related to each of the training days. The trainer support days include the following activities:</p> <ul style="list-style-type: none"> <li>• Ensuring that trainers have access to the training materials prior to the trainer support day</li> <li>• Previewing content for the training day including any updates from previous versions of the content</li> <li>• Modeling delivery of content especially for difficult or challenging sections</li> <li>• Providing positive and constructive feedback to trainers to assist in development and refining of training skills</li> <li>• Providing articles and additional information to deepen trainers’ background knowledge</li> <li>• Inquire about local context and background knowledge related to the</li> </ul>	<p>knowledge of the research-base as well as knowledge of the practices and data systems related to the content for the training day until the MTSS coordinator has developed a level fluency and can independently facilitate the trainer support days. The trainers support days include the activities listed in the “Ideal ‘Gold Standard’” column.</p>	<p>not take an active role in facilitating the support days despite thorough background knowledge around the data, systems, and practices related to the training day.</p> <p>The trainer support days do not include all of the activities listed in the “Ideal ‘Gold Standard’” column.</p>	<p>training.</p>

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	<p>content</p> <ul style="list-style-type: none"> <li>• Provide examples of active engagement strategies that can be utilized during training</li> <li>• Provide opportunities for trainers to select which portions of the training content each trainer will be responsible for presenting – the MTSS coordinator is available to take on the most difficult portions of training content as necessary</li> </ul>			
	<p>Ensures that adequate secretarial support has been allocated to support the logistics of coordinating local training (e.g., SB-CEU applications, Social Work CE’s, sign-in and sign-out sheets, registration, room reservation, ordering materials, ordering food, etc.).</p>		<p>The MTSS coordinator does not address adequate allocation of secretarial support to address the logistics of coordinating local training (e.g., SB-CEU applications, Social Work CE’s, sign-in and sign-out sheets, registration, room reservation, ordering materials, ordering food, etc.) and takes on these</p>	<p>The MTSS coordinator does not take into consideration the secretarial time and support needed to ensure the logistics of coordinating local training takes place.</p>

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	<p>Training is a vital component of the MTSS coordinator’s role and occurs across multiple levels. In this instance, the MTSS coordinator co-presents with local trainers until sufficient local capacity for the foundational core leadership team modules and the customized district implementation support modules are developed.</p>		<p>responsibilities him/herself.</p>	<p>The MTSS coordinator does not co-present with local trainers even when sufficient local capacity does not exist, requiring individuals who are not yet ready to train the content to be training.</p>
	<p>When sufficient training capacity exists, the MTSS coordinator continues to participate in all trainings to provide a feedback loop to the Implementation Teams (ISD and district), provide on-site problem solving as needed, and provide feedback to local trainers.</p>	<p>When sufficient training capacity exists, the MTSS coordinator prioritizes which trainings to attend based on the needs of the buildings, needs of the trainers, needs of the coaches. When present at the prioritized trainings, the MTSS coordinator will provide a feedback loop to the Implementation Teams (ISD and district), provide on-site problem solving as needed, and provide feedback to local trainers.</p>	<p>When sufficient training capacity exists, the MTSS coordinator is present at trainings but is actively involved in other work rather than focused on the training that is occurring.</p>	<p>When sufficient training capacity exists, the MTSS coordinator stops attending trainings.</p>
	<p>The MTSS coordinator uses training opportunities to build positive and collaborative working relationships with the building principals and building leadership teams by greeting teams as they arrive for training and interacting with teams during</p>		<p>MTSS coordinator does not engage with principals or building leadership teams while in attendance at professional development events.</p>	<p>Interactions with a principal and/or team are generally confrontational in nature. Discussions and suggestions are negative rather than using data to inform and shape practices.</p>

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	activities embedded into the training content.			
	Immediately after the training, the MTSS coordinator provides specific positive and constructive feedback to the trainers, reviews the training evaluation outcome data, ensures that the training evaluation data is summarized in a meaningful way and presented to the Implementation Team. The MTSS coordinator should document the success, needs, and obstacles that individual building teams encountered during training and shares this information with the district Implementation Teams.	Shortly after training (within a week), the MTSS coordinator provides specific positive and constructive feedback to the trainers, reviews the training evaluation outcome data, ensures that the training evaluation data is summarized in a meaningful way and presented to the Implementation Team. The MTSS coordinator should document the success, needs, and obstacles that individual building teams encountered during training and shares this information with the district Implementation Teams.	Feedback is provided through written format only or does not address all of the critical aspects of constructive feedback.  MTSS coordinator does not share needs, obstacles, or barriers that were encountered during the training with the ISD and district Implementation Team.	
<b>Develop and Support Local Coaching Capacity</b>  <b>Description of the Critical Component</b> <i>(communicated and used in job description)</i>  <ul style="list-style-type: none"> <li>• <b>Develops a plan for recruitment, selection, and development for local coaching capacity</b></li> <li>• <b>Develops local (ISD</b></li> </ul>	The MTSS coordinator provides a draft of the recruitment and selection criteria for developing local coaching capacity to the Implementation Team for input and review. Some examples for recruitment and selection criteria are as follows: <ul style="list-style-type: none"> <li>• Allocated FTE to participate in coaching skill development opportunities, to adequately prepare prior to the training,</li> </ul>	<i>Collaborates with</i> the Implementation Team to determine recruitment and selection criteria for local coaches. Examples for recruitment and selection criteria are listed in the “Ideal ‘Gold Standard’” column		The MTSS coordinator identifies local coaches without taking into consideration the recruitment or selection criteria and as a result, local coaches who do not meet all of the criteria are identified.  The MTSS coordinator presents the list of coaches to the Implementation Team in the absence of a discussion around input, benefits, and risks, causing Implementation Team members to feel as

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<p>and district level) coaching competency in an on-going way through supports provided before, during, and after training events</p>	<p>participate in team based trainings, and time to engaging in coaching functions outside of designated trainings</p> <ul style="list-style-type: none"> <li>• Strong inter-personal skills including good communication, consensus building, etc.</li> <li>• Philosophically aligned with the research base</li> <li>• Necessary skill set to understand the theory and research behind the training content as well as ability to provide examples of research applied to practice</li> </ul>			<p>through their input and concerns are irrelevant.</p>
	<p>The MTSS coordinator gathers information about local coaching capacity and a preliminary audit is completed and results are compiled and presented to the Implementation Team for review, confirmation, alternate suggestions, etc. Where local coaching capacity does not currently exist, specific action planning takes place with the Implementation Team to ensure the development of local capacity and is embedded in the implementation plan.</p>	<p><i>Collaborates with the Implementation Team to complete an audit that would determine the needs for local coaching capacity. Where local coaching capacity does not currently exist, specific action planning takes place with the Implementation Team to ensure the development of local capacity and is embedded in the implementation plan. Using developed recruitment and selection criteria, the MTSS coordinator identifies potential coaches. The</i></p>		<p>MTSS coordinator does not collaborate with the Implementation Team to complete an audit for determining the needs for local coaching capacity.</p>

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		Liaison and MTSS coordinator meet with the district Liaison to obtain prior approval before approaching the potential coaches.		
	Using the developed recruitment and selection criteria, the MTSS coordinator identifies potential coaches. The Liaison and MTSS coordinator meet with the district Liaison to obtain prior approval before approaching the potential coaches. Once the list of potential coaches has been identified, the list should become a part of the implementation support plan that will ultimately require cabinet approval via the Liaison.		Poorly defined plans are developed for increasing local coaching capacity.	Action planning for increasing local coaching capacity does not occur. There is not a plan for providing coaching support is included in the implementation support plan.
	Coaching support is scheduled on at least a monthly basis and is built around the training schedule that is a part of the implementation support plan. The frequency and length of coaching support meetings is determined based on the experience and skills of the coaches and the complexity of the training content. The schedule for coaching support dates is developed well in advance (preferably the spring prior to the next academic school year but if not possible then 3-4 months in advance).		Support to coaches is scheduled less than once a month and does not coordinate with the training schedule that is a part of the implementation support plan.	Support to coaches is provided on an occasional basis (i.e., based on availability of MTSS coordinator) and does not coordinate with the training schedule that is a part of the implementation support plan.

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	<p>In order to ensure the deepening of the content knowledge and coaching skills with coaches who have limited experience, one day of coaching support per one day of training is recommended. For all coaches, monthly coaching support meetings should be provided to ensure there is ongoing skill development and refinement as well as providing opportunities to disseminate new information as it becomes available. The plan for providing coaching support should be a part of the implementation support plan that is developed by the Implementation Team and approved by the cabinet.</p>		<p>The frequency and length of coaching support meetings is scheduled for specified days and hours versus matching the frequency and length of each meeting to the experience and skills of the coaches and complexity of the training content. The plan for providing coaching support as part of the implementation support plan is poorly defined.</p>	<p>The MTSS coordinator establishes coaching support meetings that are not linked to training content, but only as an opportunity for coaches to network with one another, socialize, and loosely share strategies. A formal agenda and/or meeting structure is not in place for coaching support meetings and the MTSS coordinator does not utilize the support meetings as an opportunity to enhance coaching skills or deepen the coaches’ knowledge around training content.</p>
	<p>The MTSS coordinator facilitates coaching support days when the MTSS coordinator has thorough background knowledge around the data, systems, and practices related to the coaching content. The coaching activities will include the following:</p> <ul style="list-style-type: none"> <li>• Practice of activities from team trainings</li> <li>• Role playing scenarios related to the training content and/or supporting teams (e.g., working through barriers or obstacles in meetings; engaging resistant</li> </ul>	<p>The MTSS coordinator co-facilitates coaching support days and an additional trainer who has deep knowledge of the underlying research-base, practices, and data systems related to the content until the MTSS coordinator has developed a level of fluency with the content and research-base and can independently facilitate the coaching support days. The coaching activities that will need to be included are listed in the</p>	<p>The MTSS coordinator does very little to no facilitation of coaching support days, relying on additional trainers who have deep knowledge of the underlying research-base, practices and data systems to facilitate coaching support days. The MTSS coordinator makes little attempt to develop</p>	<p>The MTSS coordinator does not co-facilitate coaching support days and makes no attempt to deepen knowledge of the underlying research-base, practices and data systems as a means of developing the skills to facilitate coaching support days.</p>

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	administrators or other team members; working on consensus building activities) <ul style="list-style-type: none"> <li>• Providing articles and additional information to deepen coaches’ background knowledge</li> <li>• Providing in depth review of the measurement tools prior to use with teams</li> <li>• Trouble shooting data collection, data analysis, and crucial conversations related to the data</li> <li>• Identification of local successes, needs, and obstacles</li> </ul>	“Ideal ‘Gold’ Standard” column.	fluency with the content (not reviewing or becoming familiar with content and research-base ahead of time) and as a result, is reluctant in facilitating coaching support days independently. Coaching meetings are scheduled but are not scheduled far enough in advance causing schedules to be altered and frustration by coaches to build.	
	The MTSS coordinator establishes formal and informal feedback loops with coaches.		The MTSS coordinator establishes feedback loops but feedback loops are not utilized.	The MTSS coordinator does not establish feedback loops with coaches.
	An infrastructure for providing feedback to coaches to help in the development and refinement of coaching skill sets is established and utilized. The format of the infrastructure will vary depending on the size of the districts involved and the existing resources (e.g., peer to peer feedback; MTSS coordinator to coach feedback). This plan could include feedback on-site and in real time	An infrastructure for providing feedback to coaches to help in the development and refinement of coaching skill sets is established and utilized. <i>Coaching support needs are identified and prioritized targeting supports only to coaches with the prioritized needs.</i> The format of the infrastructure will vary depending on the size of the	An infrastructure for providing feedback to coaches to help in the development and refinement of coaching skill sets is established but is not utilized on a regular basis and/or in a meaningful way.	No infrastructure for providing feedback to coaches to help in the development and refinement of coaching skill sets is established.

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	<p>with teams immediately after team meetings as well as team-based trainings. The infrastructure for coaching feedback should be a part of the implementation support plan developed by the Implementation Team and approved by the cabinet.</p>	<p>districts involved and the existing resources (e.g., peer to peer feedback; MTSS coordinator to coach feedback). This plan could include feedback on-site and in real time with teams immediately after team meetings as well as team-based trainings. The infrastructure for coaching feedback should be a part of the implementation support plan developed by the Implementation Team and approved by the cabinet.</p>		
<p><b>Guides problem-solving through data based decision making</b></p> <p><b>Description of the Critical Component</b>  <i>(communicated and used in job description)</i></p> <p><b>Appropriately uses and facilitates the use of program quality/fidelity data and outcome data at all levels of the system</b></p> <ul style="list-style-type: none"> <li>• <b>ISD/RESA Coordinators:</b> ISD, district, building level data analysis</li> <li>• <b>District Coordinators:</b> District and building level data analysis</li> </ul>	<p>Ensures both outcome and program quality/fidelity data are utilized in the development and review of the implementation plans.</p> <p>Develops systems to be used at the local district level to ensure data are accurate, collected in the designated time frame, and accurately entered into the data system for timely analysis and use.</p>	<p>Works towards developing a process to be used at the district level to ensure data are accurate, collected in the designated time frame, and accurately entered into the data system for timely analysis and use (e.g., established time frame for data collection and entry is in place and the team is developing a plan to address the</p>	<p>It is evident there is an overemphasis on the use of outcome data when developing and reviewing implementation plans.</p> <p>There is not a formal process to be used at the local district level for district to ensure the accuracy of data. Data collection and opportunities to check to see that data are collected only occur when a suspected accuracy issue arises or if the</p>	<p>Outcome and program quality data are not utilized in developing and reviewing implementation plans.</p> <p>Data that are unreliable, invalid, or inaccurate are utilized when developing and reviewing implementation plans.</p> <p>Fails to establish a system where the district ensures data are accurate, collected in the designated time frame, and accurately entered into the data system for timely analysis and use. Instead, there is overreliance on the district level coaching structure to take the initiative to remember the data that need to be gathered and reported on throughout the school year.</p>

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		accuracy of data collection).	MTSS coordinator and/or data support member attempt to generate data reports and notice data is missing. The identified contact at the district level (e.g. district MTSS coordinator or district Assessment Coordinator) is notified and works to gather the necessary data to enter into the data management system so reports can be generated.	Consequently, data are missing and it isn’t realized until long after the assessment data should have been entered into the data management system.  The MTSS coordinator is made aware of accuracy issues with the program quality and outcome data and fails to address known issues and/or communicate the issues to the Liaison.
	Establishes a system to develop local capacity for data management (e.g. PBIS Assessment Coordinators, SWIS facilitators, DIBELS Mentors, AIMSweb Local Area Mentors (LAMs), Early Warning Signs (EWS) data retrieval, etc.).	Utilizes a small group of individuals for data management until full capacity can be developed. A plan is in place to develop capacity and the MTSS coordinator in conjunction with the Implementation Team are working towards implementing the plan.	Utilizes a small group of individuals for data management without a plan for developing full capacity.	MTSS coordinator supports the use of data managers who currently have a large number of existing job responsibilities causing adequate support to be diminished, or has developed an implementation plan that does not include developing local capacity for data management.
	Applies the steps of the problem-solving process at multiple levels of the system (e.g. district, building and if ISD Coordinator: ISD, district, and building). <ul style="list-style-type: none"> <li>• <b>Gather</b> data</li> </ul>	Works towards developing fluency by applying the steps of the problem solving process at multiple levels of the system (e.g. district, building and if ISD Coordinator:	Applies the steps of the problem-solving process only at certain levels of the system (e.g. building but not district).	Engages in the problem solving process in the absence of data  Fails to engage in the problem solving process at any level of the system.

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	<p>and identify the gap between present performance and expected performance</p> <ul style="list-style-type: none"> <li>• <b>Study</b> the data to determine why there is a gap in performance</li> <li>• <b>Plan</b> to address closing the gap</li> <li>• <b>Do</b> the plan with fidelity and progress monitor the impact of the plan put in place. Adjust as data suggests and then go through the steps of the problem-solving process again</li> </ul>	<p>ISD, district, and building). The steps are listed in the “Ideal ‘Gold Standard’”.</p>		
<p><b>Deepen Personal Knowledge of MTSS data systems, practices, and the implementation research</b></p> <p><b>Description of the Critical Component</b> <i>(communicated and used in job description)</i></p> <p><b>Activity pursues opportunities to develop and deepen knowledge in MTSS data, systems, and</b></p>	<p>Resources selected to deepen knowledge align with the key features of MTSS and the implementation research.</p> <p>Areas of strength and need are accurately identified in advance and the appropriate resources, professional</p>	<p>Resources selected to initially deepen knowledge align with the key features of MTSS with a long range plan to deepen knowledge around the implementation research.</p> <p>Areas of strength and need are identified as situations warrant (e.g. MTSS</p>	<p>Failure to deepen knowledge around the key features of MTSS (data, systems, practices, implementation research) outside of the information obtained during training.</p> <p>Over reliance on local (e.g. coaches) or external MTSS consultants to</p>	<p>Resources selected to deepen knowledge do not align with the key features of MTSS (data, systems, practices) or the implementation science.</p> <p>Failure or refusal to deepen knowledge around the key features of MTSS.</p>

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<b>practices, and the implementation science</b>	development opportunities, and implementation supports are utilized in a timely manner to address identified areas of need.	coordinator attends a trainer development day and determines there are tools/resources that (s)he is unfamiliar with).	articulate to stakeholders how outcome and program quality/fidelity data used within an integrated MTSS model complement one another and provide a clearer picture of areas of strength and need.	
	Issues, questions, or concerns that might raise about the key features and corresponding data, systems, and practices of MTSS and how those things are implemented in a way that is consistent with the implementation research are anticipated.		Over reliance on internal (e.g. local coaches) or external MTSS consultants to present data to stakeholders on a regular basis rather than developing personal skill sets to take on this leadership responsibility.	
	Learning (books, conversations with knowledgeable colleagues) proactively include topics and/or issues that are raised by resistant staff in order to respond fluently to the questions and concerns in an appropriate and timely manner.	Learning (books, conversations with knowledgeable colleagues) includes topics and/or issues as they are raised by resistant staff in order to respond to the questions and concerns in an appropriate but reactive manner.		
	Further learning around the key features of MTSS, outside of information obtained during trainings, should occur on a regular basis. Examples may include but are not limited to:	Further learning around key features of MTSS occurs periodically as the needs arise		

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	<ul style="list-style-type: none"> <li>• “Keeping RtI on Track...”</li> <li>• “National Reading Panel Report”</li> <li>• IES Practice Guides for dropout prevention and instructional recommendations for adolescent learners</li> <li>• “Whole Language High Jinx”</li> <li>• “Reading in the Brain”</li> <li>• Chapter 1: “Comprehensive Behavior Management ...”</li> <li>• Review opposing viewpoints from various authors to be able to understand opposing viewpoints and articulate why the research does not support those viewpoints</li> </ul>			
	<i>Demonstrates deep knowledge in the various program quality and outcome data that are applied to the problem-solving process in an integrated MTSS model (e.g. Student Risk Screening Scale; SWIS, BoQ, SAS, PET-R, AIMSweb, DIBELS, SWIS) well in advance</i>	<i>Works towards developing fluency in the various program quality and outcome data that are applied to the problem-solving process in an integrated MTSS model (e.g. Student Risk Screening Scale; SWIS, BoQ, SAS, PET-R,</i>		

<b>Critical Component (non-negotiable)</b>	<b>Ideal “Gold Standard”</b> <i>All items within the category are in place</i>	<b>Acceptable Variation</b> <i>A description of work here takes the place of the related Gold Standard</i>	<b>Unacceptable Variation</b> <i>One or more item(s) is occurring</i>	<b>Harmful Variation</b> <i>One or more item(s) is occurring</i>
	to when the data tool is introduced to stakeholders.	AIMSweb, DIBELS, SWIS). Although fluency is not fully developed, the MTSS coordinator utilizes and relies on the external expertise (e.g. MiBLSi project staff) to inform the selection and use of various program quality and outcome data.		
	Understands the differences between and added value of utilizing both outcome and process/fidelity data to inform areas of strength, need, and resources allocated for addressing needs.			
	Understands and is able to accurately articulate to stakeholders how outcome and program quality/fidelity data used within an integrated MTSS model complement one another and provide a clearer picture of areas of strength and need.			
	<i>Develops fluency</i> in communicating data on a regular basis (e.g., monthly) with stakeholder groups (e.g. Implementation Team) with the goal of developing competency in data analysis and use.	<i>Works towards</i> developing accuracy and fluency in communicating data to stakeholders on a regular basis (e.g. monthly) with the intended goal of developing staff competency in data analysis and use.		
	Utilizes supports for internal or external expertise (e.g. local staff, MiBLSi project staff) to scaffold personal learning	Utilizes supports for internal or external expertise (e.g. local staff, MiBLSi project staff) to scaffold personal		

<b>Critical Component (non-negotiable)</b>	<b>Ideal “Gold Standard”</b> <i>All items within the category are in place</i>	<b>Acceptable Variation</b> <i>A description of work here takes the place of the related Gold Standard</i>	<b>Unacceptable Variation</b> <i>One or more item(s) is occurring</i>	<b>Harmful Variation</b> <i>One or more item(s) is occurring</i>
	around data tools, analysis and <i>use those supports prior to communicating</i> to the Implementation Team or other stakeholder groups so there is a level of independence.	learning around data tools, analysis and <i>uses those supports prior to and if the situation warrants,</i> while communicating to the Implementation Team or other stakeholder groups so there is a level of independence.		
<b>Develop a Plan for Continuous Learning for Implementation Team Membership and Appropriate Staff</b>  <b>Description of the Critical Component (communicated and used in job description)</b>  <b>Establishes and implements a plan for developing and deepening the knowledge for continuous learning for Implementation Team members and the appropriate staff</b>	Ensures the information presented at various MTSS skill development opportunities (e.g. MiBLSi statewide events, national conferences, webinars from MTSS experts in the field) are disseminated to Implementation Team members and other appropriate staff (e.g. local trainers, coaches, content experts) within one week of the trainings via structured learning opportunities as opposed to telling team members and identified staff what was learned.		Informs staff what was learned during MTSS skill development opportunities rather than utilizing the structured learning opportunities.	Professional development is provided that does not align with or is in contrast to the key features of MTSS.
	Works with the Liaison to align professional development opportunities for Implementation Team members and appropriate staff (e.g. local trainers, coaches, content experts) with the key features of MTSS data, systems, and practices and the implementation research.	Working towards alignment of professional development opportunities with the key features of MTSS data, systems, practices, and implementation research to the goals for implementation of MTSS.	Over reliance on coaches, trainers and/or external MTSS consultants to deepen staff knowledge of MTSS when personal knowledge has been established.	Failure to provide professional development to the appropriate staff (Implementation Team membership, administrative teams, etc.) related to the key features of MTSS implementation.
	Demonstrates deep knowledge of the data, systems, practices, and	Until personal learning has been sufficiently	Due to a lack of personal knowledge of the research	Does not develop sufficient personal knowledge of the research base, or does

<b>Critical Component (non-negotiable)</b>	<b>Ideal “Gold Standard”</b> <i>All items within the category are in place</i>	<b>Acceptable Variation</b> <i>A description of work here takes the place of the related Gold Standard</i>	<b>Unacceptable Variation</b> <i>One or more item(s) is occurring</i>	<b>Harmful Variation</b> <i>One or more item(s) is occurring</i>
	<p>implementation research necessary in a MTSS model and works with the Liaison to ensure professional development opportunities are aligned with the goals for implementation of MTSS and with the research base.</p>	<p>deepened, the MTSS coordinator utilizes coaches or external MTSS consultants to deepen staff knowledge and provide structured learning opportunities.</p>	<p>base or a lack of consulting with others, MTSS coordinator adheres to the research base by not expanding beyond a small set of select practices with leads to the professional development not being responsive to local needs.</p>	<p>not consult with others to ensure alignment with the research base of professional development opportunities resulting in practices that do not fit within the vision are held.</p>
	<p>Engages in personal learning (see previous critical component) with all stakeholders (Implementation Team members, local trainers, coaches) to deepen knowledge using structured learning opportunities (e.g. facilitated conversation around book excerpts, connecting the information staff are learning to building need through an analysis of data) on a regular basis.</p>			
<p><b>Effective communication</b></p> <p><b>Description of the Critical Component</b>  <i>(communicated and used in job description)</i></p> <p><b>Demonstrates effective communication skills across stakeholder groups</b></p> <p><b>Utilizes multiple</b></p>	<p>Establishes a communication plan that utilizes multiple modes of communication that allows for information to flow horizontally (e.g. across the Implementation Team, and across other stakeholder groups) and vertically (e.g. Liaison to MTSS coordinator to Implementation Team, to MiBLSi project via</p>		<p>Information is informally communicated (e.g. informal conversations, “I’m not sure you are aware but..” as issues arise the MTSS coordinator informs colleagues and/or the liaison) vertically and horizontally</p>	<p>Selective information is being communicated that results in an inaccurate picture of implementation efforts and status.</p>

<b>Critical Component (non-negotiable)</b>	<b>Ideal “Gold Standard”</b> <i>All items within the category are in place</i>	<b>Acceptable Variation</b> <i>A description of work here takes the place of the related Gold Standard</i>	<b>Unacceptable Variation</b> <i>One or more item(s) is occurring</i>	<b>Harmful Variation</b> <i>One or more item(s) is occurring</i>
<b>forms of communication to disseminate relevant information regarding MTSS implementation efforts</b>	<p>regional TAP, to local district contacts, etc.).</p> <p>The MTSS coordinator communicates with identified MiBLSi project staff in an on-going way by providing frequent status updates on activities concerning the Implementation Team and other stakeholders. Specific contextual variables that arise that may impact implementation supports (positively or negatively) are communicated to the necessary individuals in a timely way.</p>		<p>across key stakeholders. There is an over-reliance on particular forms of communication (e.g. electronic) causing information to not be disseminated in a way that accomplishes the goal of identified people knowing what is happening around the MTSS Implementation Support Plan.</p>	
	<p>Opportunities for feedback and input for addressing needs is welcomed and elicited from Implementation Team and stakeholders on a regular basis.</p>	<p>Opportunities for feedback and input for addressing needs is welcomed but no formal mechanisms currently exist to elicit feedback from the Implementation and stakeholders on a regular basis.</p>	<p>The MTSS coordinator only solicits feedback from the Implementation Team.</p>	<p>There are no formal or informal opportunities to provide feedback.</p> <p>Feedback from stakeholders other than the Implementation Team is dismissed without consideration.</p>
	<p>Specific needs that require the Implementation Team’s support are noted and communicated to necessary staff and to the Liaison in a timely manner via a formal process (documented, understood by necessary parties, regularly used, and updated when areas of the process appear to be inefficient and/or ineffective).</p>	<p>Specific needs that require the Implementation Team’s support are noted and communicated to the Liaison in a timely manner. Stakeholders are informally updated due to a lack of formal mechanisms for updating staff.</p>		<p>Specific needs are not being communicated to the Implementation Team within a timely manner to facilitate problem solving.</p>

## APPENDIX E

### ANALYTIC TABLE (COMPETENCIES)

**Critical Components:**

1. Organize, coordinate, and co-facilitate the work of the ISD and District Implementation Team
2. Develop and Support Local Training Capacity
3. Develop and Support Local Coaching Capacity
4. Guides problem-solving through data based decision making
5. Deepen Personal Knowledge of MTSS data systems, practices, and the implementation research
6. Develop a Plan for Continuous Learning for Implementation Team Membership and Appropriate Staff
7. Effective communication

<b>Type of Skill/Knowledge (Code)</b>	<b>Specific Expectations</b>	<b>Critical Component(s)</b>
<b>Interpersonal</b>	<ul style="list-style-type: none"> <li>• Knowledge of personnel/colleagues/implementation team members and their skills</li> <li>• Awareness of stakeholder groups</li> <li>• Competence and opportunity to negotiate FTE for trainers and/or coaches if necessary</li> <li>• Competence and opportunity to enlist/secure secretarial support</li> <li>• Relationship/trust building</li> </ul>	1, 2, 3, 6, 7
<b>Data Collection, Management, and Analysis</b>	<ul style="list-style-type: none"> <li>• Knowledge of which building-level data to collect</li> <li>• Access to building-level data</li> <li>• Familiarity with data management systems</li> <li>• Data collection and analysis skills</li> <li>• Ability to effectively and efficiently compile and present data and analysis</li> <li>• Ability to create and implement systems for data collection and analysis by others</li> <li>• Ability to leverage data in creating plans for implementation</li> </ul>	1, 2, 3, 4, 5

	<ul style="list-style-type: none"> <li>• Ability to help others use appropriate data effectively</li> <li>• Deep knowledge of program and outcome data</li> <li>• Recognition of the difference between, and value of, outcome and program quality/fidelity data</li> <li>• Ability to communicate the roles of different types of data within MTSS model</li> <li>• Ability to respond to implementation problems using data</li> <li>• Ability to recognize and gather appropriate data to respond to a problem</li> <li>• Understanding of the complementary use of different types of data to identify areas of strength and need</li> </ul>	
<b>Communication</b>	<ul style="list-style-type: none"> <li>• Ability to communicate progress/information for meetings</li> <li>• Ability to parsimoniously share info about schools with implementation team</li> <li>• Ability to elicit pertinent information about schools from implementation team</li> <li>• Ability to communicate systemic changes</li> <li>• Ability to effectively communicate plan adjustments to the implementation team</li> <li>• Competence and opportunity to negotiate FTE for trainers if necessary</li> <li>• Clear communication of data &amp; analysis</li> <li>• Competence to establish norms and opportunities for formal feedback from implementation team and other stakeholders</li> <li>• Competence to establish norms and opportunities for informal feedback from implementation team and other stakeholders</li> <li>• Recognition of how to best communicate feedback (informal/formal, oral/written, etc.)</li> <li>• Ability to communicate and support the plan to the cabinet</li> <li>• Ability to communicate the roles of different types of data within MTSS model</li> <li>• Ability to communicate effectively with people in various roles</li> <li>• Ability to teach rather than tell in delivering professional development</li> <li>• Ability to identify and communicate</li> </ul>	1, 2, 3, 5, 6, 7

	<p>relevant information from skill development opportunities to others</p> <ul style="list-style-type: none"> <li>• Ability to discern relevant information regarding MTSS implementation</li> <li>• Ability to communicate on multiple levels and in multiple modes</li> <li>• Ability to determine which mode of communication is appropriate for each type of interaction/information/stakeholder</li> <li>• Establishment of a formal process for stakeholders to communicate needs</li> </ul>	
<b>Professional Development</b>	<ul style="list-style-type: none"> <li>• Awareness of adult learning/effective professional development practices</li> <li>• Vision of an appropriate scope &amp; sequence for training</li> <li>• Awareness of opportunities and resources for pursuing professional development</li> <li>• Knowledge of how to support trainers</li> <li>• Knowledge around the data, systems, and practices related to each of the training days</li> <li>• Flexibility to take on whichever portions of the training the local trainers don't choose to conduct</li> <li>• Competence with co-presenting – ability to plan and coordinate presentation with local trainers</li> <li>• Ability to help others use appropriate data effectively</li> <li>• Ability to teach others about data management/data management systems</li> <li>• Ability to train others in data analysis</li> <li>• Ability to synthesize relevant information from skill development opportunities into structured learning opportunities for others</li> <li>• Ability to teach rather than tell</li> <li>• Ability to design appropriate professional development for implementation team and other staff</li> <li>• Ability to align professional development with key features of MTSS data, systems, and practices</li> <li>• Ability to align professional development with implementation research</li> <li>• Ability to design structured learning opportunities for stakeholders</li> </ul>	2, 3, 4, 5, 6
<b>Knowledge of MTSS/Implementation</b>	<ul style="list-style-type: none"> <li>• Knowledge of infrastructures necessary for MTSS Implementation</li> </ul>	1, 2, 3, 5, 6, 7

	<ul style="list-style-type: none"> <li>• Knowledge of MTSS implementation</li> <li>• Understanding of appropriate supports</li> <li>• Awareness of and access to resources available re: MTSS and implementation</li> <li>• Familiarity with research literature on MTSS &amp; implementation</li> <li>• Ability to proactively identify issues, questions, and concerns about MTSS and implementation</li> <li>• Deep knowledge of MTSS &amp; implementation</li> <li>• Deep understanding of the integration of data and processes that comprises MTSS model</li> <li>• Awareness of program-related learning needs of implementation team &amp; staff members</li> <li>• Knowledge of MTSS data, systems, and practices</li> <li>• Knowledge of MTSS goals</li> <li>• Ability to discern relevant information regarding MTSS implementation</li> </ul>	
<b>Leadership</b>	<ul style="list-style-type: none"> <li>• Ability to lead systemic change</li> <li>• Team leadership skills</li> <li>• Ability to efficiently and effectively lead a meeting</li> <li>• Knowledge of effective meeting structures</li> <li>• Ability to prioritize tasks/activities in meeting to best support implementation</li> <li>• Action planning skills</li> <li>• Competence to establish norms &amp; procedures for giving and receiving informal and formal feedback</li> <li>• Ability to facilitate the flow of information among multiple stakeholders</li> </ul>	1, 2, 3
<b>Knowledge of Local Context</b>	<ul style="list-style-type: none"> <li>• Knowledge of the local school contexts and ability to recognize and design necessary and appropriate supports for that context</li> <li>• Strong knowledge of and familiarity with existing district infrastructures and capacity</li> <li>• Understanding of local contexts in buildings/districts</li> <li>• Identification of contextual variables that impact implementation supports</li> <li>• Understanding of appropriate supports</li> <li>• Knowledge of local training needs &amp; existing capacity</li> </ul>	1, 2, 3, 6, 7

	<ul style="list-style-type: none"> <li>• Ability to assess training capacity</li> <li>• Strong understanding as to what skills/knowledge are needed by the local trainers and coaches</li> <li>• Identification &amp; understanding of the Implementation Support needs of each of the stakeholders</li> <li>• Knowledge of how much secretarial support is appropriate to support coordination of local training</li> <li>• Ability to assess and address on-site problems</li> </ul>	
<b>Personnel Management</b>	<ul style="list-style-type: none"> <li>• Ability to inspire participation, communication, and responsiveness among colleagues</li> <li>• Understanding of meeting roles</li> <li>• Ability to monitor implementation team's progress</li> <li>• Knowledge of colleagues and their skills</li> <li>• Ability to assess qualifications of coaching and training applicants</li> <li>• Understanding/working knowledge of the criteria expected of coaching and training candidates</li> <li>• Diplomacy in managing resistant staff</li> <li>• Ability to redirect/reprioritize implementation team members' activities if not going as planned</li> </ul>	1, 2, 3
<b>Time &amp; Task Management</b>	<ul style="list-style-type: none"> <li>• Ability to plan ahead</li> <li>• Action planning skills</li> <li>• Timeliness</li> <li>• Time &amp; opportunity to meet with implementation team members and outside of meetings</li> <li>• Time to meet with liaison</li> <li>• Ability to create and use a system for managing complex tasks and to proactively determine indicators of risk that work may not be completed</li> <li>• Ability to recognize components of complex tasks</li> </ul>	1, 2, 3, 5
<b>Coaching Skills</b>	<ul style="list-style-type: none"> <li>• Debriefing skills for meeting with implementation team members to review progress</li> <li>• Recognition of where feedback is needed and how it should be best communicated (formal/informal, oral/written, etc.)</li> <li>• Ability to communicate feedback effectively</li> <li>• Competence to establish appropriate</li> </ul>	1, 2, 3

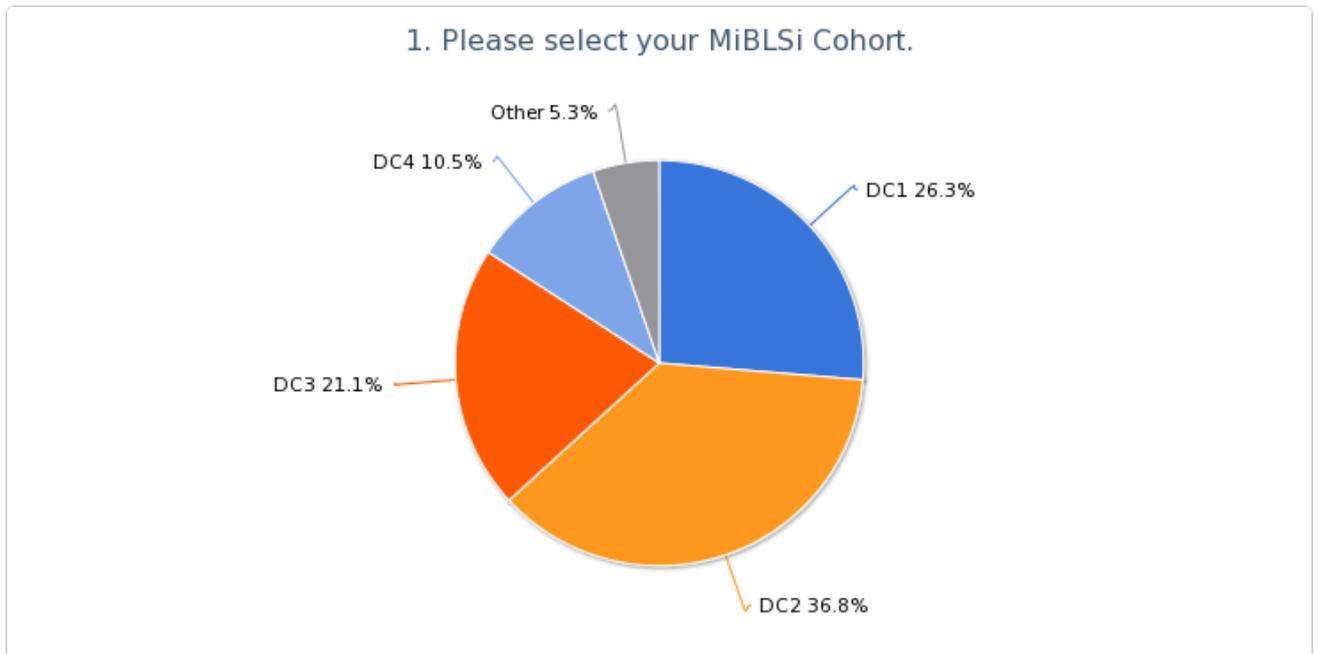
	<p>infrastructure (norms, procedures) for giving feedback, accounting for coaching context and who is giving/receiving feedback</p> <ul style="list-style-type: none"> <li>• Coaching skills, esp. for personnel who have not completed tasks</li> <li>• Coaching skills to facilitate professional reflections of implementation team members</li> <li>• Ability to redirect/reprioritize implementation team members' activities if not going as planned</li> <li>• Knowledge of how to support trainers &amp; coaches</li> <li>• Scaffolding: Ability to assess how much support local trainers need during training</li> <li>• Strong understanding as to what skills/knowledge are needed by the local coaches</li> <li>• Ability to assess coaching capacity</li> </ul>	
<p><b>Assessment skills</b></p>	<ul style="list-style-type: none"> <li>• Ability to recognize indicators of risk that work may not be completed</li> <li>• Knowledge of the local school contexts and ability to recognize and design necessary and appropriate supports for that context</li> <li>• Understanding of benefits/risks of building support</li> <li>• Ability to assess training capacity</li> <li>• Scaffolding: Ability to assess how much support local trainers need during training</li> <li>• Recognizing when &amp; how to withdraw support</li> <li>• Recognizing when &amp; how to reinstate supports if necessary</li> <li>• Ability to assess and address on-site problems – very strong working knowledge of the system and the training program</li> <li>• Recognition of what is/is not working and how to improve the training, in order to give feedback</li> <li>• Assessment of needs of building teams</li> <li>• Recognition of coaching potential in others</li> <li>• Assessment of the skills and experience of coaches and training content</li> <li>• Ability to identify successes, needs, and obstacles</li> <li>• Recognition of implementation problems</li> </ul>	<p>1, 2, 3, 4, 5, 6</p>

	<ul style="list-style-type: none"> <li>• Ability to proactively align support with needs</li> <li>• Awareness of program-related learning needs of implementation team &amp; staff members</li> <li>• Ability to recognize local needs that require implementation team support</li> <li>• Ability to recognize appropriate staff and resources to address needs</li> </ul>	
<b>Adaptability</b>	<ul style="list-style-type: none"> <li>• Ability to adjust plan and incorporate suggestions from implementation team</li> <li>• Flexibility to adjust implementation in response to data</li> <li>• Initiative to seek out learning opportunities and resources re: MTSS &amp; implementation</li> <li>• Ability to incorporate feedback and input into practice</li> </ul>	1, 3, 4, 7
<b>Collaboration</b>	<ul style="list-style-type: none"> <li>• Competence with co-presenting – ability to plan and coordinate presentation with local trainer</li> <li>• Collaboration with Implementation Team to develop coaching plan, infrastructure for feedback, supports, etc.</li> <li>• Collaboration with liaison</li> <li>• Initiative to engage in personal learning with stakeholders</li> </ul>	2, 3, 6
<b>Use of Resources</b>	<ul style="list-style-type: none"> <li>• Ability to find and share resources as needed</li> <li>• Awareness of opportunities and resources for pursuing professional development</li> <li>• Awareness of and access to resources available re: MTSS and implementation</li> <li>• Familiarity with research literature on MTSS &amp; implementation</li> <li>• Ability to align responses to issues, questions, and concerns to research literature on MTSS &amp; Implementation</li> <li>• Initiative to seek out learning opportunities and resources re: MTSS &amp; implementation</li> <li>• Ability to synthesize a variety of viewpoints to enhance learning about MTSS &amp; Implementation</li> <li>• Ability to ground critiques in research literature</li> </ul>	3, 5, 6

## APPENDIX F

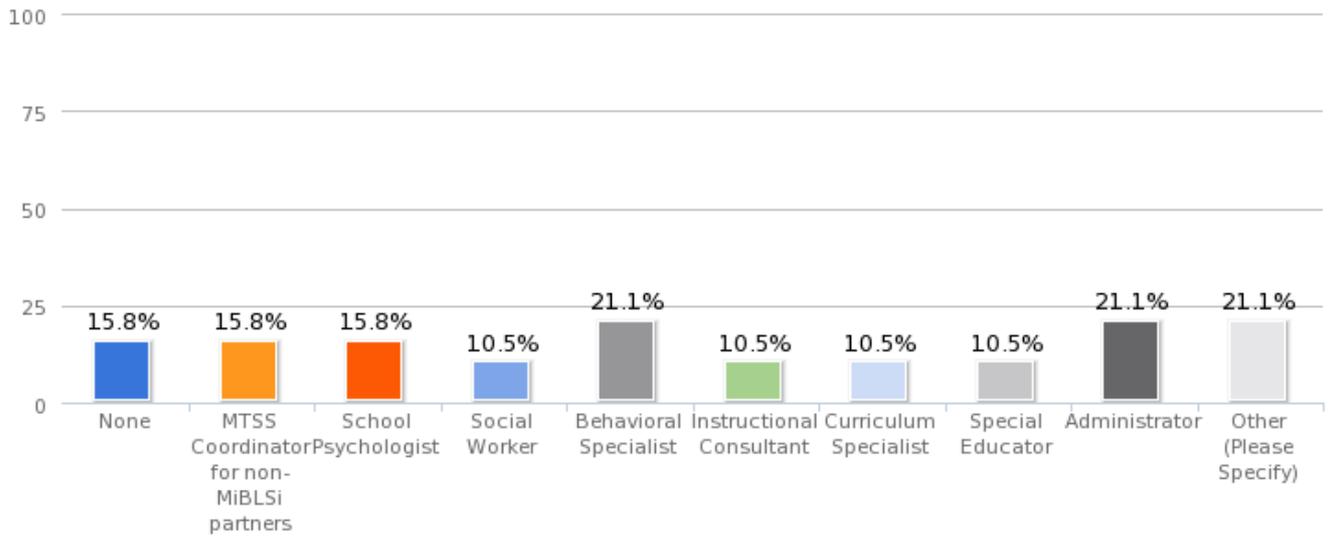
### MTSS COORDINATOR SURVEY OUTPUT

# New Summary Report - 12 November 2014



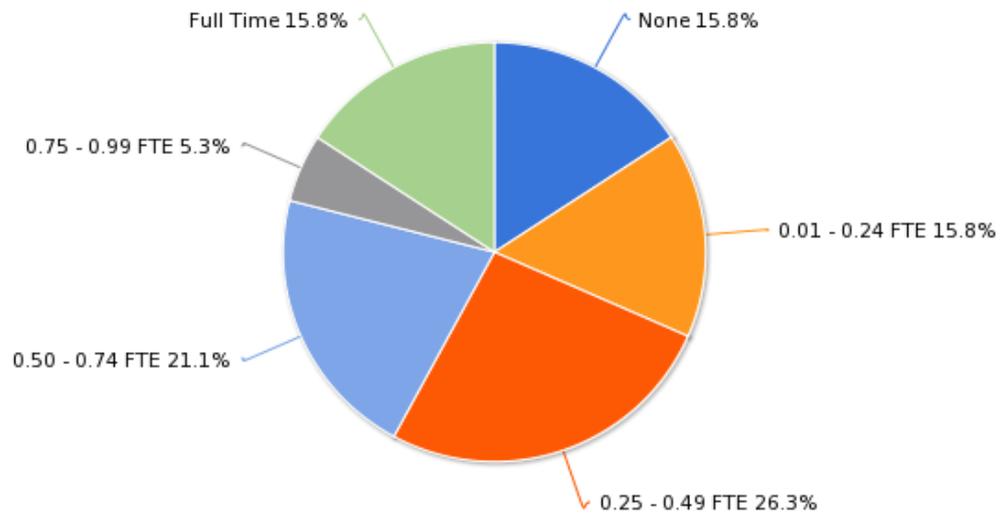
Value	Count	Percent
DC1	5	26.3%
DC2	7	36.8%
DC3	4	21.1%
DC4	2	10.5%
Other	1	5.3%

2. In addition to MiBLSi MTSS Coordinator, please select your current role(s) in the ISD/RESA. Please select as many as apply.



Value	Count	Percent
None	3	15.8%
MTSS Coordinator for non-MiBLSi partners	3	15.8%
School Psychologist	3	15.8%
Social Worker	2	10.5%
Behavioral Specialist	4	21.1%
Instructional Consultant	2	10.5%
Curriculum Specialist	2	10.5%
Special Educator	2	10.5%
Administrator	4	21.1%
Other (Please Specify)	4	21.1%

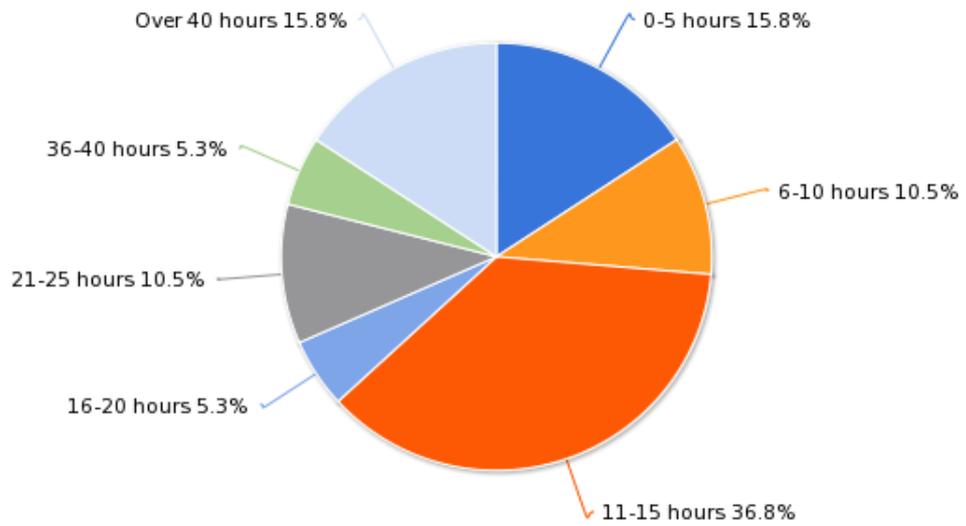
### 3. How much of your professional time is allocated to MTSS Coordination?



Value	Count	Percent
None	3	15.8%
0.01 - 0.24 FTE	3	15.8%
0.25 - 0.49 FTE	5	26.3%
0.50 - 0.74 FTE	4	21.1%
0.75 - 0.99 FTE	1	5.3%
Full Time	3	15.8%

Statistics		
Sum		4.0

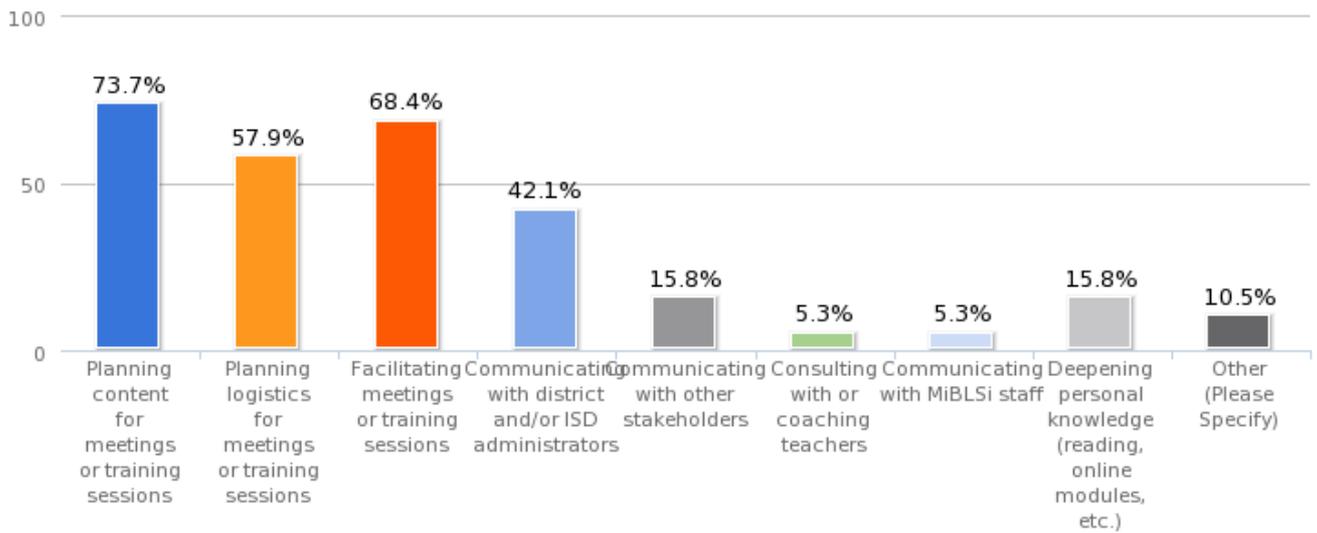
4. On average, about how many hours per week do you spend on MTSS Coordination?



Value	Count	Percent
0-5 hours	3	15.8%
6-10 hours	2	10.5%
11-15 hours	7	36.8%
16-20 hours	1	5.3%
21-25 hours	2	10.5%
26-30 hours	0	0.0%
31-35 hours	0	0.0%
36-40 hours	1	5.3%
Over 40 hours	3	15.8%

Statistics	
Sum	183.0
Average	14.1
StdDev	7.7
Max	36.0

5. Please select the three (3) activities on which you spend the majority of your MTSS Coordination time.



Value	Count	Percent
Planning content for meetings or training sessions	14	73.7%
Planning logistics for meetings or training sessions	11	57.9%
Facilitating meetings or training sessions	13	68.4%
Communicating with district and/or ISD administrators	8	42.1%
Communicating with other stakeholders	3	15.8%
Consulting with or coaching teachers	1	5.3%
Communicating with MiBLSi staff	1	5.3%
Deepening personal knowledge (reading, online modules, etc.)	3	15.8%
Other (Please Specify)	2	10.5%

6. On average, how many hours per week do you spend doing the MTSS Coordination activities you indicated above?

	<b>0-5 hours</b>	<b>6-10 hours</b>	<b>11-15 hours</b>	<b>16-20 hours</b>	<b>More than 20 hours</b>	<b>Total</b>
<b>Other (Please Specify)</b>	<b>0.0%</b> 0	<b>50.0%</b> 1	<b>0.0%</b> 0	<b>0.0%</b> 0	<b>50.0%</b> 1	<b>100%</b> 2
<b>Facilitating meetings or training sessions</b>	<b>46.2%</b> 6	<b>23.1%</b> 3	<b>30.8%</b> 4	<b>0.0%</b> 0	<b>0.0%</b> 0	<b>100%</b> 13
<b>Communicating with district and/or ISD administrators</b>	<b>75.0%</b> 6	<b>12.5%</b> 1	<b>12.5%</b> 1	<b>0.0%</b> 0	<b>0.0%</b> 0	<b>100%</b> 8
<b>Communicating with MiBLSi staff</b>	<b>100.0%</b> 1	<b>0.0%</b> 0	<b>0.0%</b> 0	<b>0.0%</b> 0	<b>0.0%</b> 0	<b>100%</b> 1
<b>Planning content for meetings or training sessions</b>	<b>57.1%</b> 8	<b>35.7%</b> 5	<b>0.0%</b> 0	<b>7.1%</b> 1	<b>0.0%</b> 0	<b>100%</b> 14
<b>Planning logistics for meetings or training sessions</b>	<b>90.9%</b> 10	<b>0.0%</b> 0	<b>9.1%</b> 1	<b>0.0%</b> 0	<b>0.0%</b> 0	<b>100%</b> 11
<b>Deepening personal knowledge (reading, online modules, etc.)</b>	<b>33.3%</b> 1	<b>33.3%</b> 1	<b>0.0%</b> 0	<b>33.3%</b> 1	<b>0.0%</b> 0	<b>100%</b> 3
<b>Communicating with other stakeholders</b>	<b>66.7%</b> 2	<b>0.0%</b> 0	<b>0.0%</b> 0	<b>0.0%</b> 0	<b>33.3%</b> 1	<b>100%</b> 3
<b>Consulting with or coaching teachers</b>	<b>100.0%</b> 1	<b>0.0%</b> 0	<b>0.0%</b> 0	<b>0.0%</b> 0	<b>0.0%</b> 0	<b>100%</b> 1

7. Using the scale below, please rate how prepared you feel to enact the following components of MTSS Coordination.

	Completely Unprepared	Somewhat prepared	Well prepared	Highly prepared	Responses
<b>Organize, coordinate, and co-facilitate the work of the ISD and District Implementation Teams</b>	0.0% 0	21.1% 4	63.2% 12	15.8% 3	19
<b>Develop and support local training capacity</b>	15.8% 3	42.1% 8	21.1% 4	21.1% 4	19
<b>Develop and support local coaching capacity</b>	5.3% 1	47.4% 9	36.8% 7	10.5% 2	19
<b>Guide problem-solving through data based decision making</b>	0.0% 0	15.8% 3	63.2% 12	21.1% 4	19
<b>Deepen personal knowledge of MTSS data systems, practices, and the implementation research</b>	0.0% 0	26.3% 5	52.6% 10	21.1% 4	19
<b>Effective communication</b>	0.0% 0	21.1% 4	47.4% 9	31.6% 6	19

8. Using the scale below, please rate how important each of the following components of MTSS Coordination is to your work.

	Not Important	Somewhat Important	Very Important	Critically Important	Responses
<b>Organize, coordinate, and co-facilitate the work of the ISD and District Implementation Teams</b>	0.0% 0	0.0% 0	47.4% 9	52.6% 10	19
<b>Develop and support local training capacity</b>	0.0% 0	5.3% 1	36.8% 7	57.9% 11	19
<b>Develop and support local coaching capacity</b>	0.0% 0	5.3% 1	26.3% 5	68.4% 13	19
<b>Guide problem-solving through data based decision making</b>	0.0% 0	0.0% 0	5.3% 1	94.7% 18	19
<b>Deepen personal knowledge of MTSS data systems, practices, and the implementation research</b>	0.0% 0	0.0% 0	42.1% 8	57.9% 11	19
<b>Effective communication</b>	0.0% 0	0.0% 0	15.8% 3	84.2% 16	19

9. Using the scale below, please indicate how helpful each of the following types of support are to your MTSS Coordination work.

	Not at all helpful	Somewhat helpful	Very helpful	Extremely helpful	Responses
<b>Technical Assistance Partner (TAP)</b>	<b>0.0%</b> 0	<b>5.3%</b> 1	<b>31.6%</b> 6	<b>63.2%</b> 12	<b>19</b>
<b>MTSS Coordinator Network Meetings (Adobe Connect)</b>	<b>0.0%</b> 0	<b>52.6%</b> 10	<b>31.6%</b> 6	<b>15.8%</b> 3	<b>19</b>
<b>MTSS Coordinator Network Meetings (Face-to-Face)</b>	<b>0.0%</b> 0	<b>31.6%</b> 6	<b>42.1%</b> 8	<b>26.3%</b> 5	<b>19</b>
<b>Online Modules (LearnPort)</b>	<b>0.0%</b> 0	<b>42.1%</b> 8	<b>47.4%</b> 9	<b>10.5%</b> 2	<b>19</b>
<b>Statewide Coaching Conference</b>	<b>5.3%</b> 1	<b>36.8%</b> 7	<b>42.1%</b> 8	<b>15.8%</b> 3	<b>19</b>
<b>Statewide Implementers' Conference</b>	<b>5.3%</b> 1	<b>47.4%</b> 9	<b>31.6%</b> 6	<b>15.8%</b> 3	<b>19</b>
<b>Trainer Workday Sessions</b>	<b>0.0%</b> 0	<b>31.6%</b> 6	<b>31.6%</b> 6	<b>36.8%</b> 7	<b>19</b>
<b>Regional Focus Planning Sessions</b>	<b>0.0%</b> 0	<b>31.6%</b> 6	<b>42.1%</b> 8	<b>26.3%</b> 5	<b>19</b>
<b>DIT meeting Materials (slideshow/workbooks/etc)</b>	<b>0.0%</b> 0	<b>26.3%</b> 5	<b>26.3%</b> 5	<b>47.4%</b> 9	<b>19</b>
<b>Special Conference Opportunities (e.g. Anita Archer, John Hattie)</b>	<b>0.0%</b> 0	<b>10.5%</b> 2	<b>26.3%</b> 5	<b>63.2%</b> 12	<b>19</b>
<b>MiBLSi-provided books and other resources</b>	<b>0.0%</b> 0	<b>5.3%</b> 1	<b>42.1%</b> 8	<b>52.6%</b> 10	<b>19</b>
<b>MiBLSi website</b>	<b>0.0%</b> 0	<b>5.3%</b> 1	<b>26.3%</b> 5	<b>68.4%</b> 13	<b>19</b>

## APPENDIX G

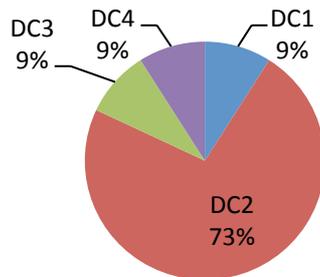
### TAP SURVEY OUTPUT

Survey: TAP Fall 2014 Survey

1. How many MTSS coordinators do you support?

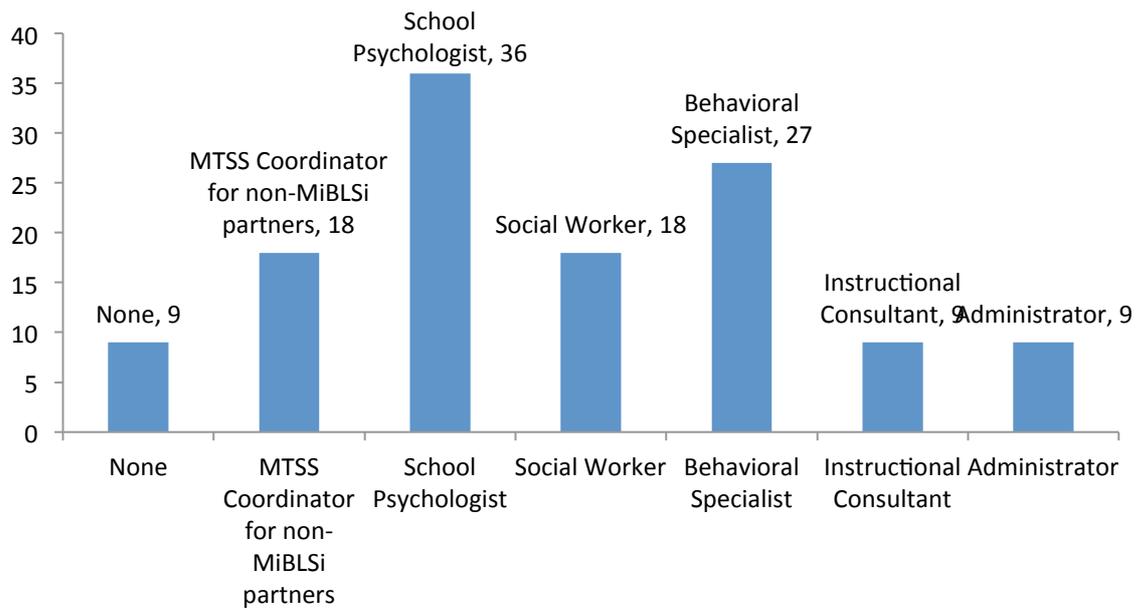
Count	Response
3	1
4	2
3	3
1	5

2. Please select the MTSS coordinator's MiBLSi Cohort.



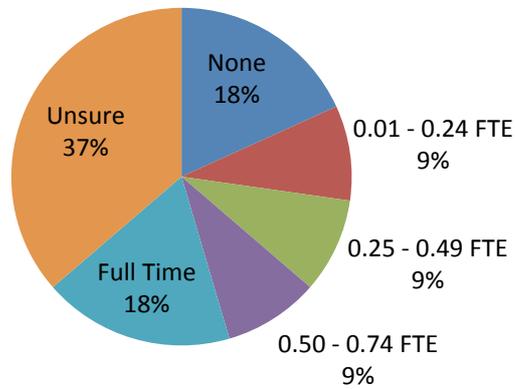
Value	Percent	Count
DC1	9.1%	1
DC2	72.7%	8
DC3	9.1%	1
DC4	9.1%	1
Other	0.0%	0
Total		11

2. In addition to MiBLSi MTSS coordinator, please select the MTSS coordinator's current role(s) at the ISD/RESA.



Value	Percent	Count
None	9.1%	1
MTSS Coordinator for non-MiBLSi partners	18.2%	2
School Psychologist	36.4%	4
Social Worker	18.2%	2
Behavioral Specialist	27.3%	3
Instructional Consultant	9.1%	1
Curriculum Specialist	0.0%	0
Special Educator	0.0%	0
Administrator	9.1%	1
Other (Please Specify)	0.0%	0
Total		11
<b>Responses"Other (Please Specify)"</b>		<b>Count</b>
Left Blank		11

2. How much of the MTSS coordinator's professional time is allotted to MTSS Coordination?

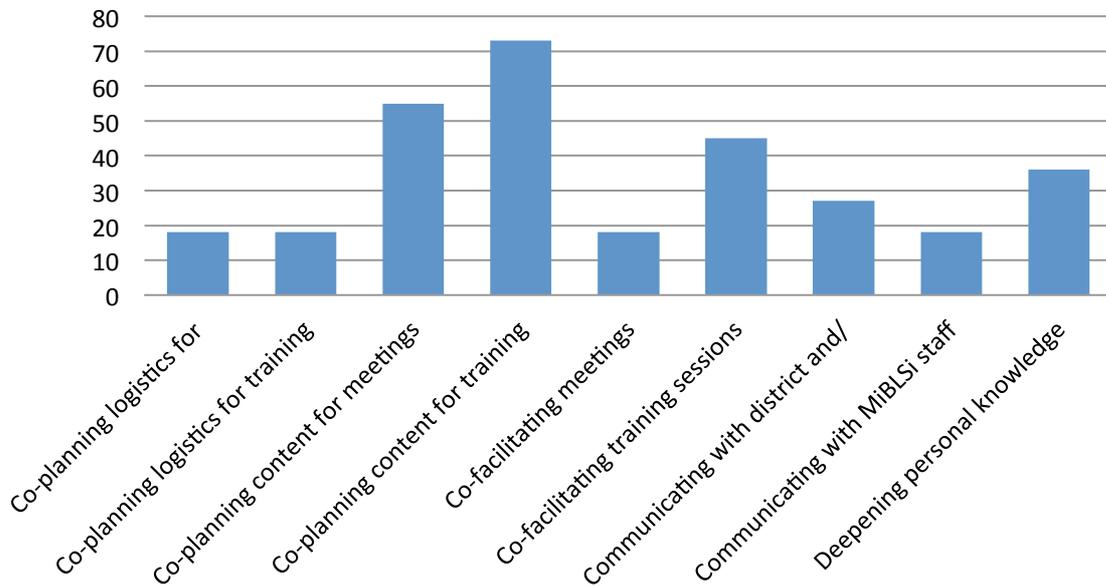


Value	Percent	Count
None	18.2%	2
0.01 - 0.24 FTE	9.1%	1
0.25 - 0.49 FTE	9.1%	1
0.50 - 0.74 FTE	9.1%	1
0.75 - 0.99 FTE	0.0%	0
Full Time	18.2%	2
Unsure	36.4%	4
Total		11

**Statistics**

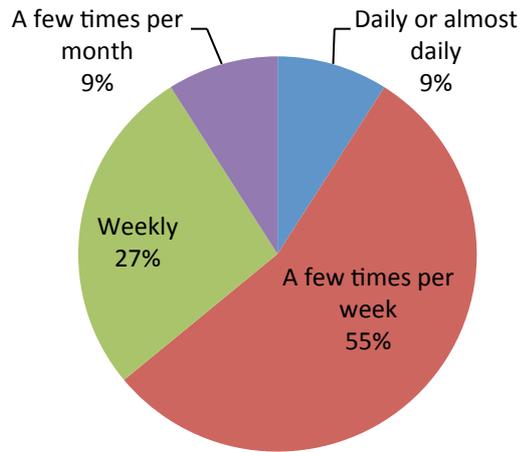
Sum	0.8
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2. Please select the three (3) areas in which you provide the majority of support to the MTSS coordinator.



Value	Percent	Count
Co-planning logistics for meetings	18.2%	2
Co-planning logistics for training sessions	18.2%	2
Co-planning content for meetings	54.6%	6
Co-planning content for training sessions	72.7%	8
Co-facilitating meetings	18.2%	2
Co-facilitating training sessions	45.5%	5
Communicating with district and/or ISD administrators	27.3%	3
Communicating with other stakeholders	0.0%	0
Co-planning to consult with or coach teachers	0.0%	0
Communicating with MiBLSi staff	18.2%	2
Deepening personal knowledge (providing resources)	36.4%	4
Other (Please Specify)	0.0%	0
Total		11
<b>Responses"Other (Please Specify)"</b>		<b>Count</b>
Left Blank		11

2. On average, how frequently do you provide direct support the MTSS coordinator?



Value	Percent	Count
Daily or almost daily	9.1%	1
A few times per week	54.6%	6
Weekly	27.3%	3
A few times per month	9.1%	1
Monthly	0.0%	0
Less than once per month	0.0%	0
Total		11

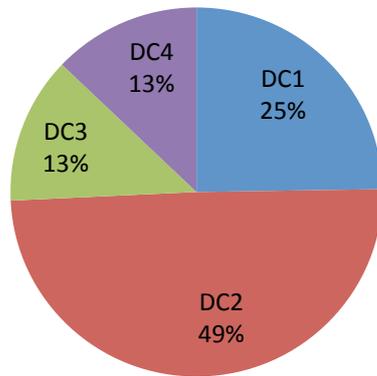
2. Using the scale below, please rate how prepared you feel this MTSS coordinator is to enact the following components of MTSS Coordination.

	Completely Unprepared	Somewhat Prepared	Well Prepared	Highly Prepared	Responses
Organize, coordinate, and co-facilitate the work of the ISD Implementation Team	0.0 % 0	27.3 % 3	45.5 % 5	27.3 % 3	11
Organize, coordinate, and co-facilitate the work of the District Implementation Team	0.0 % 0	27.3 % 3	63.6 % 7	9.1 % 1	11
Develop local training capacity	9.1 % 1	63.6 % 7	18.2 % 2	9.1 % 1	11
Support local training capacity	9.1 % 1	36.4 % 4	45.5 % 5	9.1 % 1	11
Develop local coaching capacity	9.1 % 1	45.5 % 5	36.4 % 4	9.1 % 1	11
Support local coaching capacity	9.1 % 1	36.4 % 4	45.5 % 5	9.1 % 1	11
Guide problem-solving through data based decision making	0.0 % 0	45.5 % 5	36.4 % 4	18.2 % 2	11
Deepen personal knowledge of MTSS data systems, practices, and the implementation research	0.0 % 0	27.3 % 3	54.5 % 6	18.2 % 2	11
Effective communication	0.0 % 0	18.2 % 2	54.5 % 6	27.3 % 3	11

2. Using the scale below, please rate how important each of the following components is to the work of this MTSS coordinator.

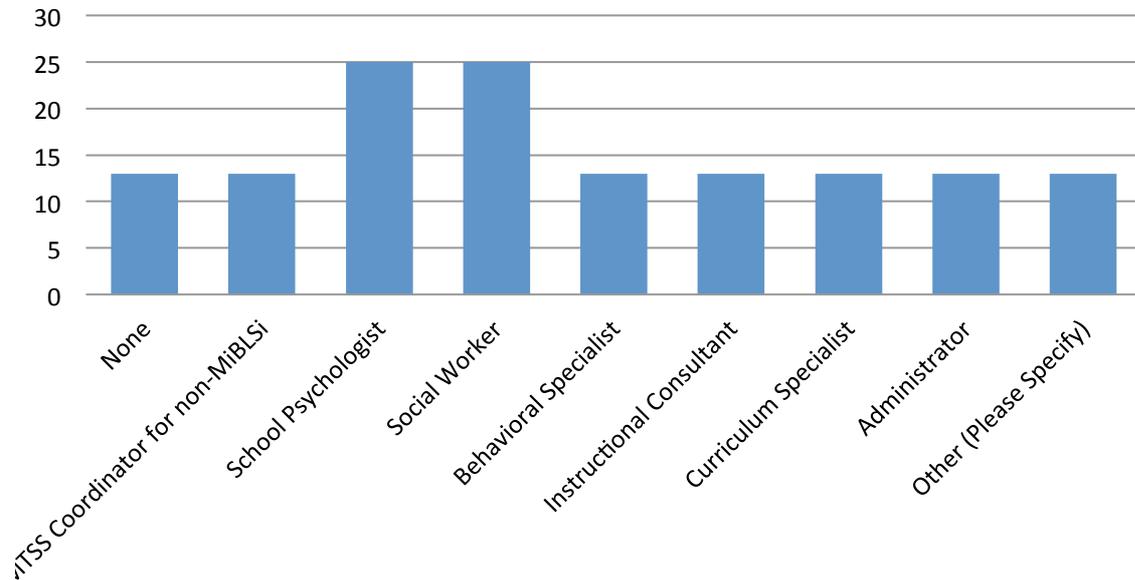
	Not at all important	Somewhat important	Very important	Critically important	Responses
Organize, coordinate, and co-facilitate the work of the ISD Implementation Team	0.0 % 0	0.0 % 0	36.4 % 4	63.6 % 7	11
Organize, coordinate, and co-facilitate the work of the District Implementation Team	0.0 % 0	9.1 % 1	54.5 % 6	36.4 % 4	11
Develop local training capacity	0.0 % 0	9.1 % 1	63.6 % 7	27.3 % 3	11
Support local training capacity	0.0 % 0	0.0 % 0	63.6 % 7	36.4 % 4	11
Develop local coaching capacity	0.0 % 0	18.2 % 2	27.3 % 3	54.5 % 6	11
Support local coaching capacity	0.0 % 0	18.2 % 2	36.4 % 4	45.5 % 5	11
Guide problem-solving through data based decision making	0.0 % 0	0.0 % 0	18.2 % 2	81.8 % 9	11
Deepen personal knowledge of MTSS data systems, practices, and the implementation research	0.0 % 0	9.1 % 1	54.5 % 6	36.4 % 4	11
Effective communication	0.0 % 0	0.0 % 0	27.3 % 3	72.7 % 8	11

3. Please select the MTSS coordinator's MiBLSi Cohort.



Value	Percent	Count
DC1	25.0%	2
DC2	50.0%	4
DC3	12.5%	1
DC4	12.5%	1
Other	0.0%	0
Total		8

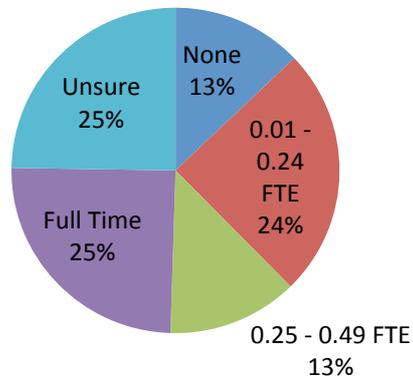
3. In addition to MiBLSi MTSS coordinator, please select the MTSS coordinator's current role(s) at the ISD/RESA.



Value	Percent	Count
None	12.5%	1
MTSS Coordinator for non-MiBLSi partners	12.5%	1
School Psychologist	25.0%	2
Social Worker	25.0%	2
Behavioral Specialist	12.5%	1
Instructional Consultant	12.5%	1
Curriculum Specialist	12.5%	1
Special Educator	0.0%	0
Administrator	12.5%	1
Other (Please Specify)	12.5%	1
Total		8

Responses "Other (Please Specify)"	Count
Left Blank	10
Literacy Consultant	1

3. How much of the MTSS coordinator's professional time is allotted to MTSS Coordination?

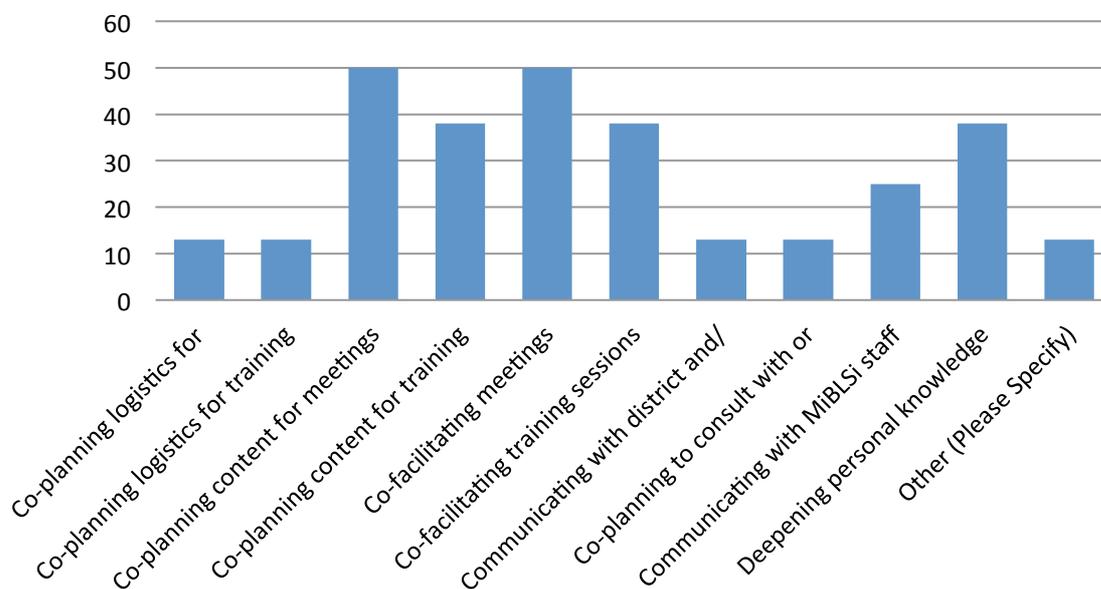


Value	Percent	Count
None	12.5%	1
0.01 - 0.24 FTE	25.0%	2
0.25 - 0.49 FTE	12.5%	1
0.50 - 0.74 FTE	0.0%	0
0.75 - 0.99 FTE	0.0%	0
Full Time	25.0%	2
Unsure	25.0%	2
Total		8

**Statistics**

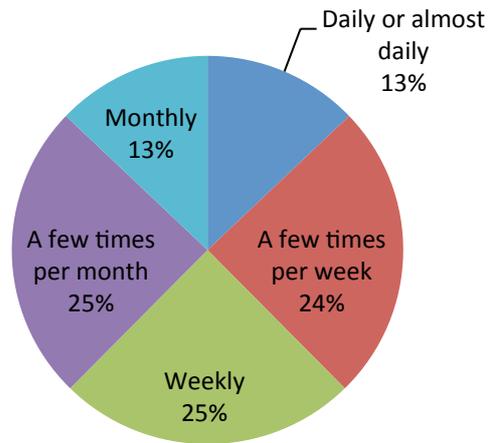
Sum 0.3

3. Please select the three (3) areas in which you provide the majority of support to the MTSS coordinator.



Value	Percent	Count
Co-planning logistics for meetings	12.5%	1
Co-planning logistics for training sessions	12.5%	1
Co-planning content for meetings	50.0%	4
Co-planning content for training sessions	37.5%	3
Co-facilitating meetings	50.0%	4
Co-facilitating training sessions	37.5%	3
Communicating with district and/or ISD administrators	12.5%	1
Communicating with other stakeholders	0.0%	0
Co-planning to consult with or coach teachers	12.5%	1
Communicating with MiBLSi staff	25.0%	2
Deepening personal knowledge (providing resources)	37.5%	3
Other (Please Specify)	12.5%	1
<b>Total</b>		<b>8</b>
<b>Responses "Other (Please Specify)"</b>		<b>Count</b>
Left Blank		10
Problem Solving ISD specific issues		1

3. On average, how frequently do you provide direct support the MTSS coordinator?



Value	Percent	Count
Daily or almost daily	12.5%	1
A few times per week	25.0%	2
Weekly	25.0%	2
A few times per month	25.0%	2
Monthly	12.5%	1
Less than once per month	0.0%	0
Total		8

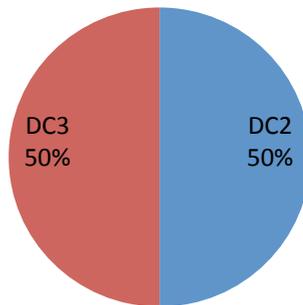
3. Using the scale below, please rate how prepared you feel this MTSS coordinator is to enact the following components of MTSS Coordination.

	Completely Unprepared	Somewhat Prepared	Well Prepared	Highly Prepared	Responses
Organize, coordinate, and co-facilitate the work of the ISD Implementation Team	12.5 % 1	37.5 % 3	37.5 % 3	12.5 % 1	8
Organize, coordinate, and co-facilitate the work of the District Implementation Team	12.5 % 1	50.0 % 4	12.5 % 1	25.0 % 2	8
Develop local training capacity	25.0 % 2	62.5 % 5	12.5 % 1	0.0 % 0	8
Support local training capacity	25.0 % 2	62.5 % 5	12.5 % 1	0.0 % 0	8
Develop local coaching capacity	25.0 % 2	50.0 % 4	12.5 % 1	12.5 % 1	8
Support local coaching capacity	25.0 % 2	37.5 % 3	25.0 % 2	12.5 % 1	8
Guide problem-solving through data based decision making	12.5 % 1	50.0 % 4	25.0 % 2	12.5 % 1	8
Deepen personal knowledge of MTSS data systems, practices, and the implementation research	0.0 % 0	37.5 % 3	50.0 % 4	12.5 % 1	8
Effective communication	0.0 % 0	62.5 % 5	25.0 % 2	12.5 % 1	8

3. Using the scale below, please rate how important each of the following components is to the work of this MTSS coordinator.

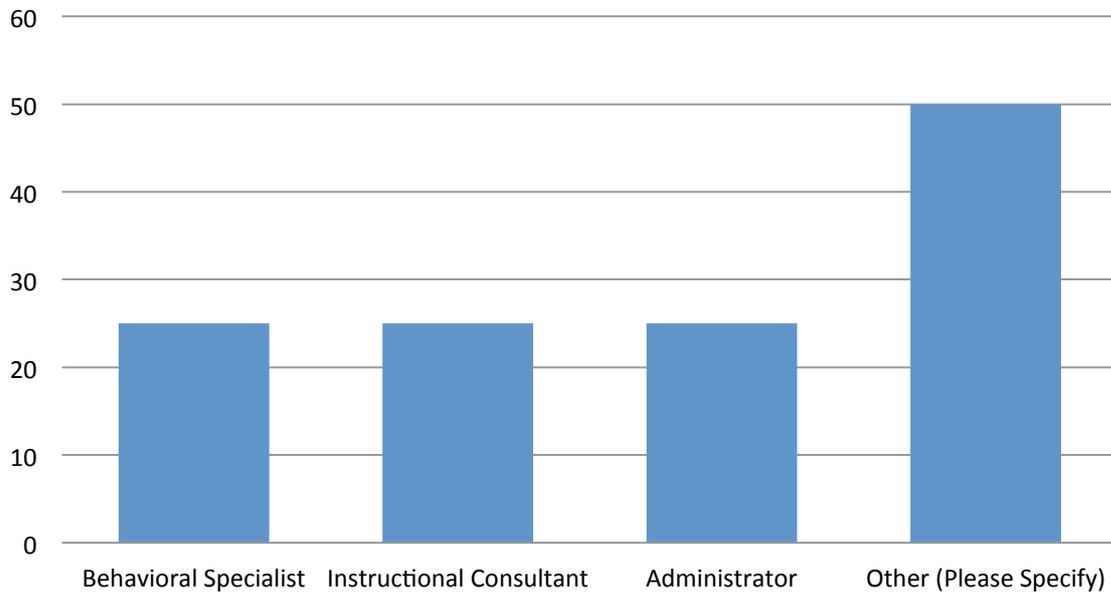
	Not at all important	Somewhat important	Very important	Critically important	Responses
Organize, coordinate, and co-facilitate the work of the ISD Implementation Team	12.5 % 1	12.5 % 1	25.0 % 2	50.0 % 4	8
Organize, coordinate, and co-facilitate the work of the District Implementation Team	0.0 % 0	12.5 % 1	25.0 % 2	62.5 % 5	8
Develop local training capacity	0.0 % 0	50.0 % 4	25.0 % 2	25.0 % 2	8
Support local training capacity	0.0 % 0	50.0 % 4	37.5 % 3	12.5 % 1	8
Develop local coaching capacity	0.0 % 0	25.0 % 2	50.0 % 4	25.0 % 2	8
Support local coaching capacity	0.0 % 0	25.0 % 2	50.0 % 4	25.0 % 2	8
Guide problem-solving through data based decision making	0.0 % 0	0.0 % 0	50.0 % 4	50.0 % 4	8
Deepen personal knowledge of MTSS data systems, practices, and the implementation research	0.0 % 0	37.5 % 3	25.0 % 2	37.5 % 3	8
Effective communication	0.0 % 0	12.5 % 1	25.0 % 2	62.5 % 5	8

4. Please select the MTSS coordinator's MiBLSi Cohort.



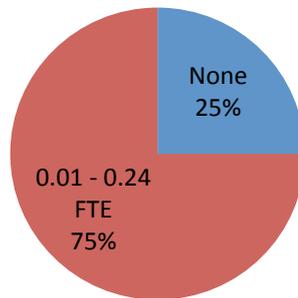
Value	Percent	Count
DC1	0.0%	0
DC2	50.0%	2
DC3	50.0%	2
DC4	0.0%	0
Other	0.0%	0
Total		4

4. In addition to MiBLSi MTSS coordinator, please select the MTSS coordinator's current role(s) at the ISD/RESA.



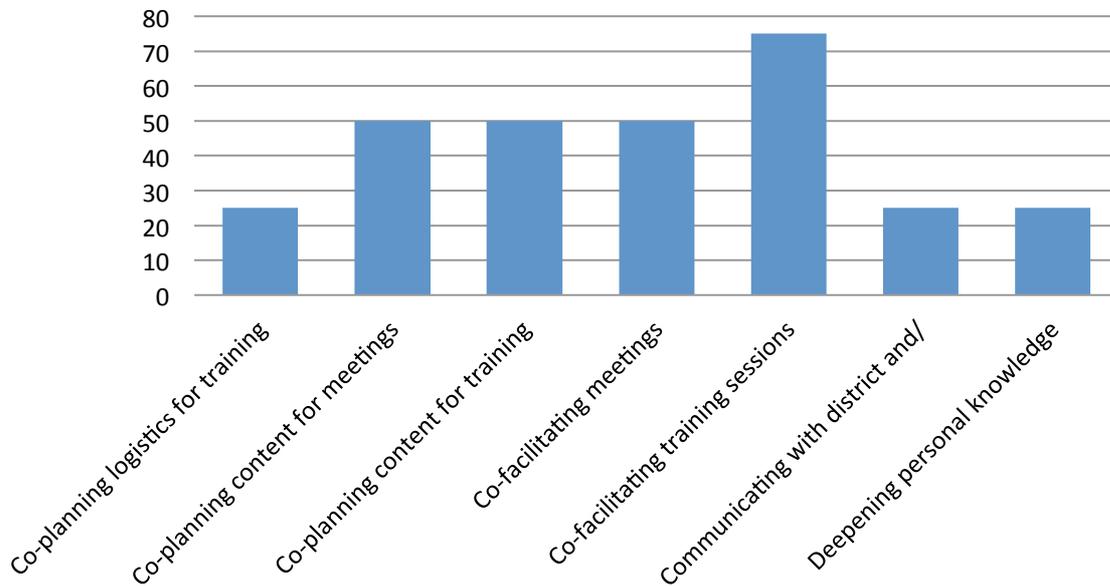
Value	Percent	Count
None	0.0%	0
MTSS Coordinator for non-MiBLSi partners	0.0%	0
School Psychologist	0.0%	0
Social Worker	0.0%	0
Behavioral Specialist	25.0%	1
Instructional Consultant	25.0%	1
Curriculum Specialist	0.0%	0
Special Educator	0.0%	0
Administrator	25.0%	1
Other (Please Specify)	50.0%	2
Total		4
<b>Responses "Other (Please Specify)"</b>		<b>Count</b>
Left Blank		9
Speech Pathologist		1
Teacher Consultant		1

4. How much of the MTSS coordinator's professional time is allotted to MTSS Coordination?



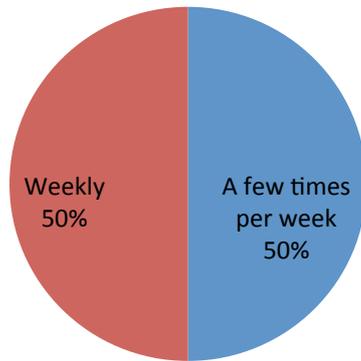
Value	Percent	Count
None	25.0%	1
0.01 - 0.24 FTE	75.0%	3
0.25 - 0.49 FTE	0.0%	0
0.50 - 0.74 FTE	0.0%	0
0.75 - 0.99 FTE	0.0%	0
Full Time	0.0%	0
Unsure	0.0%	0
Total		4

4. Please select the three (3) areas in which you provide the majority of support to the MTSS coordinator.



Value	Percent	Count
Co-planning logistics for meetings	0.0%	0
Co-planning logistics for training sessions	25.0%	1
Co-planning content for meetings	50.0%	2
Co-planning content for training sessions	50.0%	2
Co-facilitating meetings	50.0%	2
Co-facilitating training sessions	75.0%	3
Communicating with district and/or ISD administrators	25.0%	1
Communicating with other stakeholders	0.0%	0
Co-planning to consult with or coach teachers	0.0%	0
Communicating with MiBLSi staff	0.0%	0
Deepening personal knowledge (providing resources)	25.0%	1
Other (Please Specify)	0.0%	0
Total		4
<b>Responses "Other (Please Specify)"</b>		<b>Count</b>
Left Blank		11

4. On average, how frequently do you provide direct support the MTSS coordinator?



Value	Percent	Count
Daily or almost daily	0.0%	0
A few times per week	50.0%	2
Weekly	50.0%	2
A few times per month	0.0%	0
Monthly	0.0%	0
Less than once per month	0.0%	0
Total		4

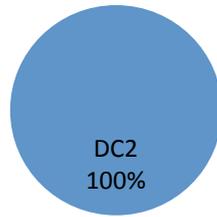
4. Using the scale below, please rate how prepared you feel this MTSS coordinator is to enact the following components of MTSS Coordination.

	Completely Unprepared	Somewhat Prepared	Well Prepared	Highly Prepared	Responses
Organize, coordinate, and co-facilitate the work of the ISD Implementation Team	0.0 % 0	75.0 % 3	0.0 % 0	25.0 % 1	4
Organize, coordinate, and co-facilitate the work of the District Implementation Team	0.0 % 0	75.0 % 3	25.0 % 1	0.0 % 0	4
Develop local training capacity	25.0 % 1	75.0 % 3	0.0 % 0	0.0 % 0	4
Support local training capacity	0.0 % 0	100.0 % 4	0.0 % 0	0.0 % 0	4
Develop local coaching capacity	25.0 % 1	50.0 % 2	25.0 % 1	0.0 % 0	4
Support local coaching capacity	0.0 % 0	75.0 % 3	25.0 % 1	0.0 % 0	4
Guide problem-solving through data based decision making	0.0 % 0	50.0 % 2	50.0 % 2	0.0 % 0	4
Deepen personal knowledge of MTSS data systems, practices, and the implementation research	0.0 % 0	50.0 % 2	25.0 % 1	25.0 % 1	4
Effective communication	0.0 % 0	50.0 % 2	25.0 % 1	25.0 % 1	4

4. Using the scale below, please rate how important each of the following components is to the work of this MTSS coordinator.

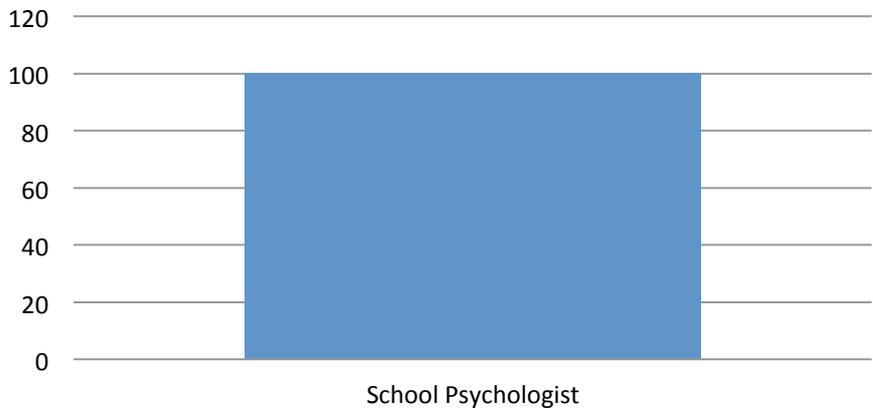
	Not at all important	Somewhat important	Very important	Critically important	Responses
Organize, coordinate, and co-facilitate the work of the ISD Implementation Team	0.0 % 0	0.0 % 0	25.0 % 1	75.0 % 3	4
Organize, coordinate, and co-facilitate the work of the District Implementation Team	0.0 % 0	25.0 % 1	25.0 % 1	50.0 % 2	4
Develop local training capacity	0.0 % 0	25.0 % 1	75.0 % 3	0.0 % 0	4
Support local training capacity	0.0 % 0	0.0 % 0	100.0 % 4	0.0 % 0	4
Develop local coaching capacity	0.0 % 0	25.0 % 1	75.0 % 3	0.0 % 0	4
Support local coaching capacity	0.0 % 0	25.0 % 1	75.0 % 3	0.0 % 0	4
Guide problem-solving through data based decision making	0.0 % 0	0.0 % 0	50.0 % 2	50.0 % 2	4
Deepen personal knowledge of MTSS data systems, practices, and the implementation research	0.0 % 0	0.0 % 0	25.0 % 1	75.0 % 3	4
Effective communication	0.0 % 0	0.0 % 0	0.0 % 0	100.0 % 4	4

5. Please select the MTSS coordinator's MiBLSi Cohort.



<b>Value</b>	<b>Percent</b>	<b>Count</b>
DC1	0.0%	0
DC2	100.0%	1
DC3	0.0%	0
DC4	0.0%	0
Other	0.0%	0
Total		1

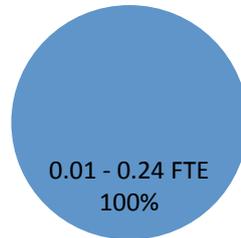
5. In addition to MiBLSi MTSS coordinator, please select the MTSS coordinator's current role(s) at the ISD/RESA.



Value	Percent	Count
None	0.0%	0
MTSS Coordinator for non-MiBLSi partners	0.0%	0
School Psychologist	100.0%	1
Social Worker	0.0%	0
Behavioral Specialist	0.0%	0
Instructional Consultant	0.0%	0
Curriculum Specialist	0.0%	0
Special Educator	0.0%	0
Administrator	0.0%	0
Other (Please Specify)	0.0%	0
Total		1

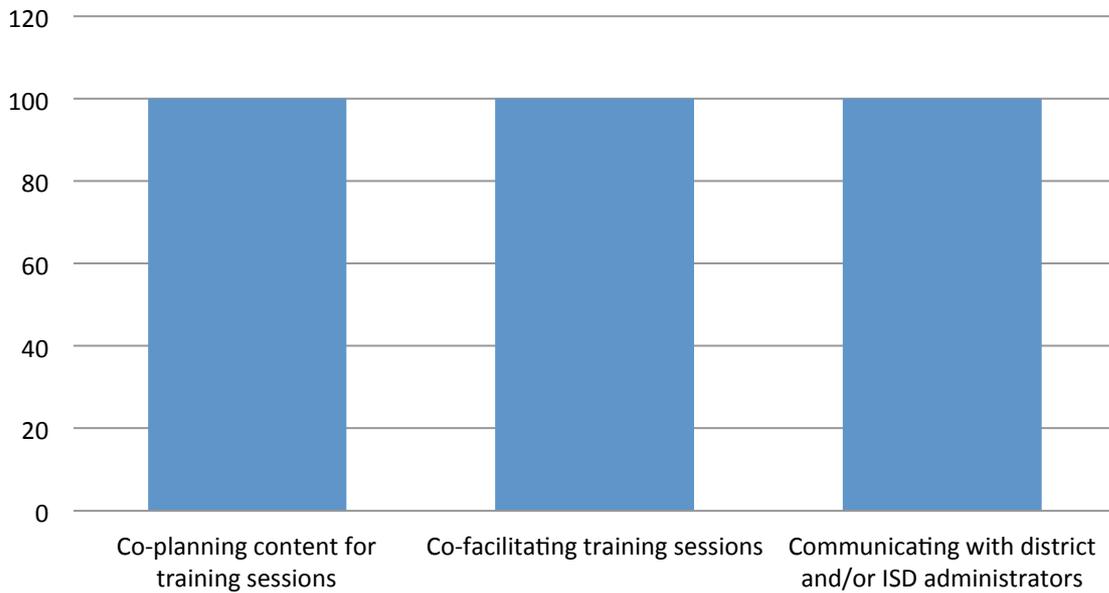
Responses"Other (Please Specify)"	Count
Left Blank	11

5. How much of the MTSS coordinator's professional time is allotted to MTSS Coordination?



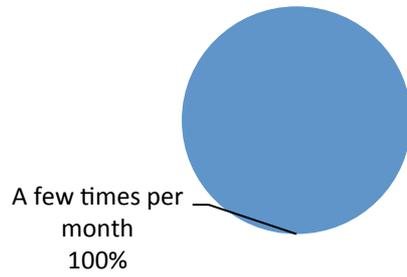
Value	Percent	Count
None	0.0%	0
0.01 - 0.24 FTE	100.0%	1
0.25 - 0.49 FTE	0.0%	0
0.50 - 0.74 FTE	0.0%	0
0.75 - 0.99 FTE	0.0%	0
Full Time	0.0%	0
Unsure	0.0%	0
Total		1

5. Please select the three (3) areas in which you provide the majority of support to the MTSS coordinator.



Value	Percent	Count
Co-planning logistics for meetings	0.0%	0
Co-planning logistics for training sessions	0.0%	0
Co-planning content for meetings	0.0%	0
Co-planning content for training sessions	100.0%	1
Co-facilitating meetings	0.0%	0
Co-facilitating training sessions	100.0%	1
Communicating with district and/or ISD administrators	100.0%	1
Communicating with other stakeholders	0.0%	0
Co-planning to consult with or coach teachers	0.0%	0
Communicating with MiBLSi staff	0.0%	0
Deepening personal knowledge (providing resources)	0.0%	0
Other (Please Specify)	0.0%	0
Total		1
<b>Responses "Other (Please Specify)"</b>		<b>Count</b>
Left Blank		11

5. On average, how frequently do you provide direct support the MTSS coordinator?



<b>Value</b>	<b>Percent</b>	<b>Count</b>
Daily or almost daily	0.0%	0
A few times per week	0.0%	0
Weekly	0.0%	0
A few times per month	100.0%	1
Monthly	0.0%	0
Less than once per month	0.0%	0
Total		1

5. Using the scale below, please rate how prepared you feel this MTSS coordinator is to enact the following components of MTSS Coordination.

	Completely Unprepared	Somewhat Prepared	Well Prepared	Highly Prepared	Responses
Organize, coordinate, and co-facilitate the work of the ISD Implementation Team	0.0 % 0	100.0 % 1	0.0 % 0	0.0 % 0	1
Organize, coordinate, and co-facilitate the work of the District Implementation Team	0.0 % 0	0.0 % 0	0.0 % 0	100.0 % 1	1
Develop local training capacity	0.0 % 0	0.0 % 0	100.0 % 1	0.0 % 0	1
Support local training capacity	0.0 % 0	0.0 % 0	100.0 % 1	0.0 % 0	1
Develop local coaching capacity	0.0 % 0	0.0 % 0	100.0 % 1	0.0 % 0	1
Support local coaching capacity	0.0 % 0	0.0 % 0	100.0 % 1	0.0 % 0	1
Guide problem-solving through data based decision making	0.0 % 0	0.0 % 0	0.0 % 0	100.0 % 1	1
Deepen personal knowledge of MTSS data systems, practices, and the implementation research	0.0 % 0	0.0 % 0	0.0 % 0	100.0 % 1	1
Effective communication	0.0 % 0	0.0 % 0	0.0 % 0	100.0 % 1	1

5. Using the scale below, please rate how important each of the following components is to the work of this MTSS coordinator.

	Not at all important	Somewhat important	Very important	Critically important	Responses
Organize, coordinate, and co-facilitate the work of the ISD Implementation Team	0.0 % 0	100.0 % 1	0.0 % 0	0.0 % 0	1
Organize, coordinate, and co-facilitate the work of the District Implementation Team	0.0 % 0	0.0 % 0	0.0 % 0	100.0 % 1	1
Develop local training capacity	0.0 % 0	0.0 % 0	100.0 % 1	0.0 % 0	1
Support local training capacity	0.0 % 0	0.0 % 0	100.0 % 1	0.0 % 0	1
Develop local coaching capacity	0.0 % 0	0.0 % 0	100.0 % 1	0.0 % 0	1
Support local coaching capacity	0.0 % 0	0.0 % 0	100.0 % 1	0.0 % 0	1
Guide problem-solving through data based decision making	0.0 % 0	0.0 % 0	0.0 % 0	100.0 % 1	1
Deepen personal knowledge of MTSS data systems, practices, and the implementation research	0.0 % 0	0.0 % 0	0.0 % 0	100.0 % 1	1
Effective communication	0.0 % 0	0.0 % 0	0.0 % 0	100.0 % 1	1

6. Please share any ideas you have as to how MiBLSi could improve support for MTSS coordinators.

**Count Response**

- 1 Continue to make connections to other MTSS-Cs with similar ISD / District demographics
- 1 Help ISD determine what is realistic in terms of FTE for an MTSS C
- 1 I think MiDATA will become a powerful tool to help the MTSS-C.
- 1 None
- 1 Continue to survey MTSS-C and TAPS to determine areas of high need to better meet their needs at MTSS-C meetings and trainings.
- 1 perhaps sessions specific to the categories listed in this survey... Support to build trainers and coaches... opportunities to gain implementation experience
- 1 Opportunities to continue to deepen knowledge, hear from other MTSS-C on how they have increased coaching and training capacity (specifics on how this was accomplished), working through mock data and the data review process to develop fluency especially the writing of MTSS Implementation Plans.

7. Please share any ideas you have as to how MiBLSi could better assist TAPs in supporting MTSS coordinators.

**Count Response**

- 1 - more examples of content outcomes,
- 1 None at this time.
- 1 Positive Examples of ISD/District/School Practices
- 1 Revisit the document about each ISD, discuss "what works" at MiBLSi TAU mtgs.
- 1 Opportunities for TAPS to share out how MTSS-C are supporting the work - showcasing good ideas and products, organizing the MTSS-C tab on the website so past materials are more readily/easily accessible, opportunities as a group with other unit support as appropriate to dig deeper into new measures (e.g. EWS. SWETR-S) and content (HS data review, secondary literacy, other content), reviewing district and ISD implementation plans to see the variations and level of quality

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