Implementing School Improvement in the "iZone 2.0": A Case Study of Three Memphis Schools

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Introduction

Since 2012, Tennessee has pursued two tracks of school improvement for its lowest-performing schools. One is the Achievement School District (ASD), a statewide district formed in 2010 operated by the Tennessee Department of Education. In this model, low-performing schools are removed from their local district and turned over to the ASD for oversight. These schools are now mostly run by charter management organizations. The second model—a local district response to the ASD—is the innovation zone, or "iZone," in which low-performing schools remain with their district, are placed into an intra-district network, and are given greater autonomy, resources, and district support (Glazer et al., 2020; Zimmer et al., 2017). Four iZones have operated in Tennessee, in the Shelby County, Metropolitan Nashville, Hamilton County, and Knox County school districts. The largest by far is in Shelby County (Memphis), currently with 23 iZone schools.

An evaluation of these two reform models after six years found that students in ASD schools performed no better and no worse on state achievement tests than students in a comparison group of low-performing schools. In contrast, students in iZone schools saw gains that surpassed those in the comparison group (Pham et al., 2020; Zimmer et al., 2017). Further analyses pointed to mediating factors that appear to explain these diverging outcomes. For example, iZone schools were comparatively better at hiring, developing, and retaining effective teachers and leaders (Henry et al., 2020). Local districts also provided dedicated support structures to iZone schools that were not available to ASD schools. At the same time, high rates of student mobility and chronic absenteeism appeared to suppress larger effects in the iZones.

The ASD and iZone models continued in the Tennessee Department of Education revised school accountability plan under ESSA, the Every Student Succeeds Act, in 2018-19. However, the process for identifying Priority schools—the lowest performing schools in the state—was modified. (Under ESSA, Priority schools are also known as Comprehensive Support and Improvement, or CSI schools.) In Shelby County, this led to major changes in the list of participating schools, with 13 schools exiting the iZone and 11 schools added.[i] The 2019-20 academic year began with a new cohort of iZone schools and a reimagined approach to turnaround referred to locally as "iZone 2.0."[ii]

In early 2020, we visited three newly designated iZone schools in Shelby County—one elementary, one middle, and one high school—to learn more about their implementation of the iZone 2.0 turnaround strategy, and to gauge the extent to which it aligned with the five principles of successful school turnaround identified by Henry et al. (2018). These principles were developed from existing research on school turnaround in Tennessee and other states:

- Principle 1: Establish a dedicated organizational infrastructure within the district.
- Principle 2: Identify and address barriers to improvement.
- Principle 3: Increase the capacity for effective instruction.
- Principle 4: Increase the capacity for effective leadership.
- Principle 5: Implement school processes and practices that support continuity and maintain stability.

We elaborate on each principle as we report our findings but note their similarity to the three levers for school turnaround articulated in Tennessee's ESSA plan: developing strong leadership, developing effective instruction, and creating student supports.

Key Findings:

- Principals in our study stepped into a turnaround strategy that was already well-established. Each expressed a clear understanding of the roles of the school, district, and state in implementing school improvement and of the resources available to them.

- The district continues to play a substantial role in school improvement, perhaps even more so than the initial iteration of the iZone. Under ESSA, district supports that were previously targeted to iZone schools were extended to *all* Priority/CSI schools.

- Reflecting the ESSA approach to turnaround, school improvement plans were integral to the implementation of iZone 2.0, clearly defining school leaders' priorities and guiding district monitoring and support.

- Hiring, development, and retention of effective teachers and school leaders remain central elements of the iZone 2.0 strategy. Prior research found these strategies to be important drivers of the iZone's success.

- Chronic absenteeism and behavioral infractions were commonly cited barriers to improvement that principals explicitly addressed in their school improvement plans.

Methodology

In the spring of 2020—days before the district closed due to the emergence of COVID-19—two members of our research team visited the Shelby County Schools to conduct semi-structured interviews with school and district personnel. We interviewed three principals and the district's Chief Academic Officer and conducted three teacher focus groups. These were recorded and later transcribed for analysis. Our interview protocols consisted of roughly 22 primary questions, organized around Henry et al. (2018)'s five principles. Transcripts were initially coded in relation to the five principles, with additional subcodes created when novel responses emerged. We were also attentive to ways in which the schools were addressing chronic absenteeism, a new focus of ESSA and previous suppressor of school improvement in the iZone, according to prior research (Henry et al., 2020).

To protect the identity of the three schools visited, we use the pseudonyms Robin ES, Blue Jay MS, and Cardinal HS, corresponding to the elementary, middle, and high school, respectively. For context, the Appendix reports mean characteristics for Shelby County "iZone 2.0" schools in 2019-20, the previous set of iZone schools in 2018-19, and all Shelby County schools.

On average, iZone schools in 2019-20 had a somewhat smaller share of economically disadvantaged and Black students than iZone schools in 2018-19, and a larger share of Hispanic and Limited English proficient students. The mean percentage of chronically absent students in iZone schools was lower in 2019-20 than 2018-19, but still quite high, at 25.8%. The mean in-school suspension rate was lower in 2019-20, while the mean out-of-school suspension rate was similar across years (and very high, at 22-23 percent). (The lower absenteeism and suspensions rate may reflect efforts by the schools to reduce absenteeism, as noted below). In both years, iZone schools served a more economically disadvantaged population than SCS as a whole and faced substantially higher rates of chronic absenteeism and behavioral infractions.

Two of the schools we visited—Blue Jay MS and Cardinal HS—differed from the typical iZone school in 2019-20 in that they served a smaller share of economically disadvantaged students and a much larger share of Hispanic students. Cardinal HS also served a significantly greater share of English learners than the iZone average. Suspension and expulsion rates in these schools were lower than iZone schools overall. While the schools we visited were more like iZone schools than the district as a whole, they were not representative of *all* iZone schools. This, and the nature of a case study design, suggests we cannot generalize to all iZone schools.

Findings: iZone 2.0 and the Five Principles

Organizational infrastructure

Principle 1 highlights the importance of a dedicated infrastructure for supporting and monitoring turnround schools; a delineation of complementary responsibilities for the state, district, and school; and a cohesive set of policies and practices that differ from other district schools. Since its inception, the iZone in Shelby County has adhered closely to this principle: its defining characteristic is its district-within-a-district organization, with school autonomy, dedicated resources, and district support. The same elements of the model continue under iZone 2.0. If anything, the district role has become more systemic and comprehensive.

The state is responsible under ESSA for identifying CSI schools and for laying out basic requirements, including preparation of a school improvement plan. Newly under ESSA, the state conducts quarterly "milestone visits" at CSI schools that include a walk-through and a principal presentation. These visits are followed by a summary assessment, feedback, and targeted opportunities for support from the state, including funding and training. (In Shelby County, all CSI schools are part of the iZone).

At the district level, an iZone team conducts regular site visits to monitor implementation of the improvement plan; this team has authority to adapt plans based on these visits and their review of school data. The district leader we interviewed described "Five Key Levers of School Turnaround" that undergird the iZone 2.0 vision of school improvement. These include teaching and learning, culture and climate, aligned staff, systems and operations, and personal leadership. These levers inform the development and monitoring of the improvement plan, and the suite of programs and supports targeted to iZone schools.

The district and school leaders we spoke with identified several building-level supports provided by the iZone. Among these were content coaches, data analysts, graduation coaches, content managers, and a leadership supervisor. All school leaders in our case study expressed a clear understanding of the resources available to them and characterized these supports as aiding their efforts. (For one example, see the following quote).

> "We have instructional coaches for literacy and numeracy. We also have a graduation coach. The advisors come to our school once a week on Mondays. The instructional coaches meet with the teachers, as a group, during their planning times; they will also meet with teachers individually and will help in the classroom. We are really enjoying this support. At the beginning of the year, I meet with the advisors to share my vision for the school, and we work together to be on the same page for the school year." – *Cardinal HS principal*

The Robin ES principal told us that while structures, processes, and policies are set by the district iZone team, schools are granted autonomy to go beyond these. In their case, the school extended content-area blocks to 90 minutes, beyond the 80-minute minimum set by the district iZone leaders. iZone schools have an extra hour of instruction in each school day, and Robin's principal told us they devoted these to core subject remediation and instruction.

We noted several other iZone policies and practices that differ from those applicable to other schools in the district, particularly around teacher and leader hiring and retention. These are described in a later section.

Barriers to improvement

Principle 2 underscores the need for a systematic needs assessment, for policies and practices aligned to those needs, and regular progress monitoring. While acknowledging the importance of traditional academic performance metrics such as test scores and graduation rates, this principle foregrounds other sources of instability inherent in low-performing schools that often constitute barriers to sustained improvement, such as student churn, chronic absenteeism, and teacher or principal turnover.

All three schools in our study conducted a needs assessment in the spring and summer of 2019 in collaboration with district support staff. Each school cited low academic performance among their schools' greatest needs, especially in English Language Arts (ELA) and math, and (at the high school) low performance on the ACT. Chronic absenteeism was cited by Blue Jay MS as a barrier to improvement, while Cardinal HS listed behavioral infractions and a high suspension rate as particular challenges at their school. All of these were included in the school's improvement plans.

The principal of Robin ES shared specific policies they adopted to improve achievement in core subjects. One was providing students with a "double dose" of ELA in grades 3-5, with

Expeditionary Learning used in one class and iReady (emphasizing reading and writing skills) in the other. Robin ES's principal cited the importance of professional development (PD) in order to "meet students where they are and then push them to where they need to be [academically]." Responding to their aim of improving ACT scores, the principal of Cardinal HS introduced Saturday workshops for ACT test-taking strategy (e.g., "beating the clock"), an ACT bootcamp for juniors, and ACT-focused PD for teachers.

Cardinal's principal also described the approach they adopted to mitigate a historically high suspension rate, which dropped by 5 percent between 2018-19 and 2019-20. This approach included an intensive orientation designed to set expectations around discipline and behavior, and a requirement that students check their cell phones with staff daily. (See the quote below). The principal of Blue Jay MS reported working with the district truancy officer to communicate the importance of attendance to parents.

> At the beginning of the year, we had a three-week orientation for our students… we wanted our students to understand our expectations prior to starting instruction so there would be less discipline issues during instruction… the students went to the session where they learned different things like anger management. We then reinforced what the kids learned during the orientation throughout the remainder of the year. – *Cardinal HS principal*

All three principals described their systems for monitoring individual student progress, and for tracking progress toward mitigating their school's barriers to improvement. For example, the principal of Robin ES explained how they use *MasteryConnect*, a curriculum and assessment platform: "…we are able to go in and see how students are performing on different standards… Here we can use this data to inform teachers' practices for specific standards for specific students. When we are thinking about chronic absenteeism or discipline, we do the same thing."
The principals of Blue Jay MS and Cardinal HS reinforced the importance of data in monitoring their progress towards addressing their schools' needs. According to Blue Jay's principal, "we have an online tool called *PowerBI* [the district's data dashboard] that we use to monitor everything. In *PowerBI* we have school demographics, student achievement data, student and teacher attendance data, and teacher retention data. This helps us monitor everything on a daily basis." Cardinal's principal also cited *PowerBI*, saying "[it] gives us early warning signs. For example, with graduation. If a student has chronic absenteeism the system flags those students and lets us know."

Effective instruction

Principle 3 emphasizes the importance of effective instruction for school turnaround, with recruiting, retention, professional development, and a well-aligned curriculum at the forefront. Our interviews with Shelby County district leaders, principals, and teachers revealed multiple ways in which the iZone is working to recruit, develop, and retain effective teachers. As noted above, the three schools we visited also made routine use of data to monitor student progress and focus instruction on specific standards where students are lagging.

At the district level, CSI schools are allowed to do early "targeted hiring" and to participate in a charter school hiring fair called Teach901. Teachers in iZone schools receive a $1,500 signing bonus and a $1,000 retention bonus, two practices that were carried over from earlier iterations of the iZone turnaround strategy. (As noted earlier, iZone teachers also teach an additional hour per day). The district also provides professional pathways for teachers to become content leaders, which comes with an additional $1,500 stipend.

When asked about teacher recruitment, school leaders noted the importance of early hiring privileges and the iZone salary premium. In recruiting candidates, they each relied heavily on their and their most effective teachers' personal and professional networks, including previous schools, universities, and alternative certification programs (see the quote below).

> It begins with the relationships I have built here in the district. A lot of the faculty and staff that were hired, I worked with at a previous building. One thing I have tried to do is stay connected with [my university]. I often reach out to the team down there to see who they have. I also use teachers that have been effective for me to recruit teachers to come to our school. – *Robin ES principal*

The principal at Cardinal HS brought in an entirely new team when they arrived at the school in 2019, although existing teachers were allowed to re-apply for their positions. They described a "re-imagine" vision campaign that was pitched to teachers and the community over the summer; teachers were asked to "sell the vision" to recruit other teachers, a strategy the principal viewed as successful.

Examples of professional development and new teacher induction were provided at both the district and school level. Teachers new to the iZone engaged in a week-long, district-led training. One Blue Jay MS teacher explained to us that this training addressed both subject-matter and general pedagogical skills. Describing their new teacher induction, the Cardinal HS principal stated, "We begin with walking through the curriculum and routines for the first week of school.

How we look at the master schedule. Lesson planning. How to work with curriculum. Classroom management."

In each school in our study, new teachers are assigned both a district and school-level mentor and observe expert teachers in their content area at their or other schools. The Blue Jay HS principal told us that mentoring focuses on best practices by content area and on analysis of student data. All teachers participate in 64 PD hours throughout the school year, activities that include bi-weekly PLC meetings with content coaches and grade-level teams, faculty meetings, and twice-monthly meetings with district coaches.

With respect to retention strategies, principals mentioned appealing first and foremost to their teachers' sense of purpose and cited the importance of instructional support and making their teachers feel valued (see quote below).

> I make sure I am talking to them often and provide as much support as possible to help them. Asking them questions like, "what supports do you need in order to remain here?" Also, it is important to make these teachers feel like they are a part of something bigger than themselves. If they are doing some innovative and effective instruction, asking them to run a PD that shares their methods with other staff members. This gives them chances at leadership within the school, which makes them feel valued. – *Robin ES principal*

While teachers across the three schools identified the retention bonus as important for their decision to stay, several also noted the schools' efforts to cultivate a positive, friendly culture that included relationships outside of school. For example, teachers at Robin ES and Blue Jay MS described social outings and a holiday celebration that helped to build community and "create a family-like culture."

CSI schools use the same TNReady-aligned curriculum as the district: Eureka Math for math instruction and Expeditionary Learning for ELA. Glazer et al. (2020) described the iZone's transition to Eureka Math in 2017-18 as challenging, with many teachers describing the content as inappropriate for their struggling students. While teachers' experience with the curriculum was not a focus of our study, the Robin ES principal described the teachers as "becoming more comfortable" with the curriculum. They added: "it's been wonderful that we are aligned with the district this year because observers can come in and provide immediate and thorough feedback in a short amount of time that we can use to inform instruction for our students."

Effective leadership

Principle 4 speaks to the importance of effective leadership for teacher retention and for promoting effective instruction and a positive work environment. In the Shelby County iZone, this occurs through hiring, development, and retention of effective principals in low-performing schools. The state provides financial incentives for principals to work in CSI schools, including recruitment and retention bonuses of $15,000 and $10,000, respectively. The principal of Robin ES (but not the others) also noted opportunities for performance bonuses.

The three principals in our study were all new to their schools in 2019-20. They described similar transition activities, including consultation with former principals and school walk-throughs with their instructional leadership teams. Each of these were focused on developing a better understanding of the school's culture and climate prior to planning the year. The leaders cited varying degrees of support from the former principal, with one new principal unfortunately having no communication with the prior leader. The principal of Robin ES described their successful interaction with the former principal: "When I moved here, the principal gave me a lot of information around what had gone on here, because he had been here for five years. Being privy to his successes and failures... was really helpful in informing what we had to do this year."

CSI and iZone principals engage in PD opportunities throughout the year, including summer, from multiple sources, including external providers (see the following quote). While many PD opportunities were offered district-wide, some—including training from a school turnaround institute—were targeted specifically at turnaround leaders.

> [Principals] do district DOD, zone meetings, district PD for new initiatives, and school-based PD. Additionally, they have to complete the 64 hours of PD like the teachers. CSI professional development, zone instructional support advisors. It just varies who delivers the PD. Also, we partner with Relay for training, we partner our elementary leaders with the University of Virginia partners for leaders in education turnaround institute. And, we partner with San Diego State University around school leadership and support in turnaround settings. – *District leader*

The principal at Blue Jay MS summarized their key take-away from these PD opportunities as follows: "everything is urgent when you are a turnaround leader. You should use data every day and your decisions should be based on data."

Processes and practices for stability

Principle 5 encourages school-wide processes and routines that promote continuity, stability, and consistency. In addition to measures to retain effective teachers and principals, these practices include steps to maintain a safe and caring environment and to keep the focus on teaching and learning. For the three principals in our case study, classroom management and student behavior were a top priority. In a departure from the punitive practices previously followed in their schools, the principals we interviewed described new behavior management policies focused on socio-emotional learning. These policies emphasized early intervention, high expectations, conflict management, and suspension as a last resort (see the following quote).

> [Last year] the focus [was] on student behavior but punitively. So, we brought in people who could assist us in socio-emotional learning. We were actually identified by the state as a turnaround school who would be provided more support focused on socio-emotional learning. As a result, we added socio-emotional learning to our school block. We have it for the first 15 minutes of the day. This was completely different to how it was here previously. – *Robin ES principal*

In another example, the principal of Cardinal HS described their new approach to behavioral management and socio-emotional learning. That school formed a Response to Intervention for Behavior (RTI-B) team charged with developing and monitoring a plan addressing behavior and socio-emotional learning. Echoing Robin ES, this plan was designed to be less punitive than the practices used by the school in the past; they cited this strategy as one reason why its suspension rate had fallen.

Teachers also spoke at length about the behavioral management policies at their schools. One of Robin ES's teachers provided numerous examples (see the following quote).

> There is a behavioral chart located in each teacher's room that they follow. Also, there are incentives that we use to reward the students for their behavior. We also have good behavior parties, attendance parties, hot bucks if they are good citizens in the classroom. We have a social worker who comes in on Wednesdays. Since we are an ACES school and received that grant, we have other services for students. Also, we spend the first 15 minutes of each day doing a socio-emotional learning activity. For example, motivation Monday, yoga Thursday. – *Robin ES teacher*

The schools made extensive use of PD in support of their behavioral strategies. For example, the principal of Robin ES noted: "We send teachers to classroom management PD several times during the year. We also give them one-on-one instruction during the school year. Teachers can observe other teachers who are using effective classroom management techniques." Blue Jay MS provided PD on socio-emotional learning, classroom management, and RTI-B.

Discussion

In 2020, we visited three newly designated iZone schools in Memphis to learn more about the reimagined "iZone 2.0" turnaround strategy and how the district and these schools were implementing that strategy. In doing so, we used the five principles of successful school turnaround identified by Henry et al. (2018) as a framework for organizing what we learned.

It was clear from our interviews that much of what made the iZone successful was retained under iZone 2.0. In particular, the district continues to play a central role in supporting individual schools, providing additional resources and targeted professional development (Principle #1). As before, iZone schools offer one additional hour of instruction per week, and recruitment, retention, and performance bonuses are provided for iZone teachers and leaders (Principles #3-4).

At the same time, there were elements and emphases of iZone 2.0 that appeared to depart from earlier practice, in some cases in response to ESSA. For example, schools are now required to prepare and implement a school improvement plan, a document that allows schools to identify barriers to improvement and craft strategies in response to them (Principle #2). The improvement plan is used by the district and state to monitor progress and hold schools accountable. Both the district and the state conduct periodic "walk-throughs" and provide targeted feedback to school leaders that includes analyses of data. Unlike in past years, *all* CSI/Priority schools are part of the iZone 2.0, allowing the district to provide a consistent and coherent set of supports to its lowest-performing schools. The three schools in our case study all identified chronic absenteeism and/or student behavior as barriers to improvement, and cited strategies to mitigate these barriers in their school improvement plans. While these challenges are not new to struggling schools, ESSA elevated student attendance and socio-emotional learning as school priorities, and it was interesting to see how the schools we visited were addressing these federal priorities.

There are a few things that the district leader and schools in our case study did *not* mention that we found notable. For instance, the initial iZone vision emphasized the "network" aspect of the

strategy's district-within-a-district organization. In addition to receiving support from the district, schools within the network ostensibly learned best practices from one another as well. While this may occur in the iZone 2.0 iteration—perhaps in targeted PD—relationships with other iZone schools did not come up in our interviews. The initial iZone vision also sought to engage parents and community members through "councils"; engagement with families and the larger community was not cited in our conversations with school leaders.

More than ten years have passed since Tennessee implemented two tracks of school turnaround, the state-led ASD and district-led iZones. Prompted by lackluster results, the Tennessee Department of Education in 2020 drafted a framework for schools to exit the ASD and either return to their local district or remain independent under a state charter commission.[iii] It remains to be seen whether the iZone 2.0 schools will continue to outpace their ASD counterparts, and—due to the testing interruption caused by COVID—it may be several years before this question can be satisfactorily addressed.

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Appendix

Table 1: Mean school characteristics, Shelby County iZone schools in 2018-19 and 2019-20, and all Shelby County schools in 2018-19

Percent:	2019-20 iZone schools	2018-19 iZone schools	2018-19 All SCS
Economically disadvantaged	79.4	81.4	64.0
Black	90.6	91.9	80.5
Hispanic	7.4	6.5	12.8
White	1.5	1.3	5.5
Limited English proficient	3.4	3.1	6.7
Experienced teachers	64.4	64.9	68.4
Chronically absent	25.8	28.5	20.0
Expulsion rate	1.9	1.8	0.5
In-school suspension rate	11.5	14.4	5.6
Out-of-school suspension rate	22.3	22.9	10.4

Notes: Data from the Tennessee Department of Education. N=21 and 20 for 2019-20 and 2018-19 iZone schools, respectively. N=202 for All SCS.

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[i] Pignolet, Jennifer. "11 in, 13 out: Massive reshuffling of iZone schools proposed for Shelby County Schools." Memphis Commercial Appeal, January 15, 2019. https://www.commercialappeal.com/story/news/education/2019/01/15/shelby-county-schools-innovation-zone-izone/2586516002/. A review of Shelby County Schools budget documents suggests that 13 schools were added in FY 2019-20.

[ii] For the district's description of the iZone 2.0, see the Shelby County Schools District Budget, 2020-21 Adopted Budget.

[iii] Aldrich, Martha. "Plan for exiting schools from Tennessee turnaround district will head to governor's desk." Chalkbeat, May 4, 2021. https://tn.chalkbeat.org/2021/5/4/22419528/plan-for-exiting-schools-from-tennessee-turnaround-district-will-head-to-governors-desk