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Lessons and Possibilities: Notes regarding CSRD in Puerto Rico

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Northeast and Islands
Regional Educational
Laboratory

Lessons and Possibilities

Notes regarding CSRD in Puerto Rico

a program of



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Lessons and Possibilities

Notes regarding CSRD in Puerto Rico

(based on site visits March 12-15 and September 10-14, 2000, and on reviews of literature and previous LAB CSRD involvement in Puerto Rico)

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Northeast and Islands Regional Educational Laboratory

a program of The Education Alliance at Brown University

Northeast and Islands Regional Educational Laboratory At Brown University (LAB)

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Note: This report was prepared to complement the Northeast and Islands Regional Educational Laboratory's (LAB's) study "English Language Learners, the Comprehensive School Reform Demonstration Project, and the Role of State Departments of Education" (Hamann, Zuliani, and Hudak 2000) from which Puerto Rico was excluded. Because Spanish is the primary language of instruction in Puerto Rico (though bilingualism is a high school graduation goal) asking how Puerto Rico has responded to ELLs within its CSR/D program is a fundamentally different issue than it is for other jurisdictions in the LAB region. A question that would better parallel the CSR/D/ELL study would ask how Puerto Rico schools were accommodating the needs of Spanish Language Learners. However, we decided the logistics of such a study were more complicated than we could resolve in the limited time period for the main ELL study. Yet, we are also cognizant that, even though the island comprises the third largest school district in the U.S. and there are over 850,000 K-12 students, 40,000 teachers, and 1547 public schools in Puerto Rico, because Puerto Rico differs from other U.S. jurisdictions on a number of educational issues it is often simply skipped and, in effect, silenced by a lot of educational research. Not wanting to 'skip' Puerto Rico, we decided to prepare this overview of CSR/D implementation there instead. We hope this report will simultaneously be useful to CSR/D implementers in Puerto Rico (from the Department of Education level to the school level) and to federal education policymakers concerned with CSR/D. Reflecting the lead author's greater adeptness with English, this report has initially been prepared in English, but it will be subsequently translated into Spanish to make it more broadly accessible in Puerto Rico.

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INTRODUCTION

Based on site visits to six Comprehensive School Reform Demonstration (CSRSD) project schools in Puerto Rico and extensive engagement with Puerto Rico's Department of Education (PRDOE) staff and more than a hundred site directors, teachers, and district and regional personnel, we at the Northeast and Islands Regional Educational Laboratory (LAB) have occasion here to share our observations and provisional conclusions regarding CSRSD in Puerto Rico at the end of Year 2000. Our comments are simultaneously framed by Erickson's (1984) recommendations regarding what makes school ethnography 'ethnographic' and by a national political context that includes serious questioning of Lightspan the school change model that predominates in Puerto Rico's CSRSD implementation. Erickson reminds us that because there is always more data that could potentially be collected and analyzed than practically can be collected and analyzed, conclusions/recommendations should be put forward provisionally, even though the analysis that created them was carefully rendered. As our central provisional conclusion, we believe that there is no cause for broad alarm about Puerto Rico's ongoing implementation of the federally supported CSRSD program (despite any criticism of Lightspan on the mainland). However, the limited resources available to Puerto Rico's CSRSD schools, the issue of whether PRDOE and Puerto Rico's schools should view CSRSD as a vehicle for school restructuring or just for shoring up various areas of difficulty, and the special circumstances of CSRSD implementation in Puerto Rico all merit further consideration. The remainder of this document is intended to explain how comprehensive school reform generally and CSRSD specifically were operative in Puerto Rico in the latter part of 2000 and to lay bare some important choices that we think the U.S. Department of Education, PRDOE, and/or the LAB will need to confront over the next few months. This report includes commentary regarding Lightspan and the other three models currently being promoted in Puerto Rico schools through CSRSD.

CONTEXT AND METHODOLOGY

At a federal level and elsewhere there has been some concern regarding the implementation of the CSRSD program in Puerto Rico, concern related to the late start of implementation, to the turnover of program staff at the PRDOE, and, most loudly, to the question of compliance with federal intentions. This last is manifest in a still minor concern regarding Puerto Rico's development of means for CSRSD evaluation (at the island and more local levels) and the more substantive concern that the 'CSRSD models' being implemented in Puerto Rico are not comprehensive or rigorous. In particular, the broad adoption of Lightspan—the CSRSD model at 52 of Puerto Rico's 75 CSRSD schools—has been singled out in the mainland press as an example of straying from the original comprehensive intent of the federal program (*USA Today* 2/18/00). Because two other curriculum initiatives—the Puerto Rico Statewide Systemic Initiative (PRSSI) and Computer Curriculum Consultants (CCC)—are the models at 21 additional CSRSD schools in Puerto Rico, it looks like 73 of the 75 CSRSD programs in Puerto Rico schools are guided by adoption of curriculum models that on their own are not comprehensive. (The two schools that have adopted Expeditionary Learning/Outward Bound (ELOB) stand out as whole-school reform exceptions.) To illustrate, Lightspan requires and supports adaptation of the English, mathematics, technology and science curriculums, while PRSSI promotes curricular change in mathematics and science. Those may be useful categories for change at schools and may improve student achievement within specific domains, but on their own they do not comprise comprehensive reform. As will be clarified, however, in Puerto Rico these models are usually

packaged with other efforts that collectively are closer to comprehensive. Moreover, in their school coaching roles some model providers clearly worked beyond the constraints of their model's blueprints and were engaged holistically in the efforts of the school.

The genesis of this report was the lead author's decision to convert his Puerto Rico visit 'scratch notes' and memories into first field notes and then this document.¹ Because memory can quickly become distorted, it is a foundational tenet of ethnographic methodology to record field notes as quickly as possible after observation/interaction with the subjects of a study. In this case, the initial draft of this report was prepared within three days of the end of the second of two site visits to Puerto Rico.² Subsequently, the Puerto Rico-based second author, read the initial draft and suggested several key revisions and supplementations based on her deep knowledge of schooling on the island. She has lived in Puerto Rico most of her life and devoted much of her career to working with PRDOE, model providers, and others interested in Puerto Rican education.

Consistent with recommended ethnographic methodology (Agar 1980, Sanjek 1990), the data analysis was directed towards testing our central claim—that school reform in Puerto Rico CSRD schools reflected neither a lack of comprehensiveness nor other obvious weaknesses, whatever the limits of the portions of schools' activities that were directly supported with CSRD funds. (Note that our description of PRSSI does mention a possible weakness of that model as enacted so far.) Keeping within the rationale for applied research to address local problems, the very reason for three of the authors' presence in Puerto Rico was to assist PRDOE with various phases of CSRD implementation (notably evaluation), while assistance to PRDOE is a permanent role of the fourth. In keeping with the applied research rationale, this document is consciously intended for audiences who can further improve the comprehensive school reform process in Puerto Rico (e.g., PRDOE, U.S. Department of Education, and the LAB where we work).

MACRO-LESSONS REGARDING CSRD IMPLEMENTATION IN PUERTO RICO

In all cases when those who are to implement a policy are not the same people as those who initiated it, there is a necessary act of interpretation (Levinson and Sutton [in press]). Through that interpretation, new policy is created with substantial but not total overlap with the original. Also through this interpretive process, multiple policy parameters are integrated together with the prospect of initial policy impulses being changed through this act of synthesis. Both of these dynamics are true of the case of Puerto Rico's CSRD implementation both formally and informally. Puerto Rico, like the District of Columbia and each state, was formally required to file an SEA-level CSRD application that added state-level policy parameters to the federal foundation. Through daily practice, PRDOE educators (at the state, school, and intermediate levels) have informally endeavored to link their understanding of island educational needs with the intent of CSRD's originators. In so doing, they have adjusted and added contextual parameters to the original federal and state visions. In those acts of interpretation, existing educational priorities on the island—like Commissioner Fajardo's³ call for the increased use of technology in education and improved instruction in English—have been incorporated into CSRD.⁴ Indeed, an explanation for the popularity of Lightspan in Puerto Rico as a CSRD model is due to Lightspan's response to both of the Commissioner's goals. Traditional patterns of wanting to promote island-developed initiatives, stemming in part from the fact that many mainland initiatives require linguistic (and cultural) adaptation, have also been incorporated into Puerto Rico's CSRD roll-out.⁵ This may be a rationale for endorsing as a CSRD model a curriculum initiative like PRSSI that was co-developed by PRDOE (even though conversion of it to fit within a CSRD framework has proven awkward).

As in other jurisdictions, the way CSRD has been responded to in Puerto Rico has much to do with recent educational history there. Prior to the 1990s, one needs to look back to the 1940s to find major changes in Puerto Rican K-12 schooling policy, but in the past decade substantial reform laws were passed three times, in 1990, 1994, and 1999. The 1994 decision to decentralize school administration, which occurred coetaneously to the federal revision of Title I that made many Puerto Rico's schools 'school-wide Title I,' is the most salient to CSRD. The 1994 Puerto Rican educational reform legally changed the relationship between PRDOE and school site directors, replacing old rules requiring central control of expenditures, curriculum, and personnel management with site-based autonomy and accountability. To be sure, however, the change in rules was much faster than the change in habits. PRDOE's requests for attendance at the CSRD evaluation workshops we carried out in September were sent to schools with less than a week's lead time, but still with the expectation that all site directors would attend. (Most did.)

The 1994 change in Puerto Rican educational law came with few new resources for professional development or other means to assist the transition to a new form of school governance, and it offered little to assist schools with the newly explicit task of aligning their educational programs with Puerto Rico's educational standards. In short, the 1994 change created excitement, uncertainty, and a new desire for resources. When CSRD applications were first being solicited in Puerto Rico, the \$50,000/year made available represented a larger 'prize' than perhaps elsewhere where per student expenditures and school budgets are substantially higher. Also, the overlapping prospects of working with a model provider and having nearby schools trying to implement similar changes raised the possibility of assistance with aligning reform components and curricula to standards and the promise of peer support from educators at similarly situated schools. For applicant schools, the 1994 change and, for many, the requirement of preparing Title I schoolwide comprehensive plans meant that big, abstract ideas about whole school change had been mooted for several years and by the time CSRD was initiated there was a hunger for discrete and tangible programs. In other words, CSRD came on the scene when few schools were pondering 'what to do,' but many were considering 'how to' carry out specific reforms. Moreover, a scarcity of available substitute teachers and related logistic impediments meant many school directors were reluctant to pursue models that required substantial professional development that kept teachers from their classrooms.

Like jurisdictions which have used CSRD monies to change literacy curricula, for example, Puerto Rico has largely used CSRD monies to support curricular reforms that promise shoring up or improvement in identified areas of weakness and need—e.g., English, technology, math, and science. While we found the goal of improving schooling to be broadly embraced by educators at PRDOE and in the schools, that goal seemed rarely to be interpreted as an impetus for substantial school restructuring. Instead the prevailing problem diagnoses were less systemic. (Policies always start with at least an implicit problem diagnosis [Levinson and Sutton *in press*, Shore and Wright 1997].) For example, consistent with the Commissioner's technology emphasis, models like Lightspan and CCC are supported by rationales like 'if we need to improve technology education then let's improve our technology curriculum and obtain more equipment'. Lightspan and CCC are, in part, technology curricula.

To the extent whole-school change is on the agenda in Puerto Rico's CSRD schools, it seems to be so mostly because of the twin influences of changing Title I to a school-wide program and the 1994 Puerto Rico school administration decentralization law. Unlike CSRD, which promises funding for no more than three years, these two main impetuses for whole school reform in Puerto Rico are more enduring. It also seems plausible to suggest that with recent reform's emphasis on greater site-based accountability that there is a reluctance to take bold but daunting, slow, and thus risky types of holistic reform.

Though our study's lack of a longitudinal perspective makes it hard for us to know how changes in Title I policy and Puerto Rico's school administration guidelines compelled restructuring in the schools we visited, that those efforts did compel substantial change and the perception of substantial change by school leaders seems clear. Thus any premise by federal CSRD initiators that further externally initiated substantial restructuring would be broadly welcome or sought in Puerto Rico seems misplaced; at the time CSRD came on the scene the impulse was to consolidate change that had origin in reforms of Puerto Rican law or Title I. CSRD implementation in Puerto Rico seems largely premised on the idea of school improvement without restructuring.⁶ In all but two CSRD schools, the goal for CSRD seems to be to improve existing practices rather than to change practices. Puerto Rico CSRD implementers, particularly those at PRDOE, face a policy question regarding whether this 'enhance rather than restructure' orientation is indeed their conscious choice for what they want CSRD to accomplish on the island. Current school structures and practices, like the sometime school organization at the elementary level into different academic topic areas with different teachers and the broad use of externally developed curricula, are largely not deemed problematic, or at least do not seem to be targets of CSRD supported change. Neither Puerto Rico's statewide CSRD plan nor any of the more than 100 school and district personnel that we spoke with suggested that basic school organization was a source of student difficulty that CSRD could remedy.

The obvious possible exceptions to this (within CSRD) are the two Expeditionary Learning/Outward Bound (ELOB) schools, one of which we visited in Utuado.⁷ Puerto Rico's ELOB school in Utuado is still at an early stage of ELOB implementation, but already it is supporting curriculum development by faculty, interdisciplinary classroom inquiry, and use of the larger community as sites for learning (including students' families and homes as well as public and private natural areas). All three of these innovations constitute restructurings of various degrees. As it continues to support the two ELOB/CSRD schools and as it contemplates the pending expansion of CSRD (because of new funding), PRDOE faces choices regarding how important it is to use CSRD to support restructuring initiatives (as opposed to less dramatic improvement within existing frameworks). Regarding ELOB and any other model provider, PRDOE also needs to consider how to encourage a minimum number of schools to adopt the model such that it is economically viable for the model provider to remain in Puerto Rico. In a 1998 analysis, the LAB found that a number of mainland CSRD model providers were unwilling to work in Puerto Rico (e.g., Co-NECT, Modern Red Schoolhouse, and America's Choice). While in a way this is a federal issue akin to the challenge of getting model providers to operate in expensive to reach rural schools, PRDOE is in a position to consciously enable a model provider to come or to stay in Puerto Rico (with a more varied list of choices for schools being one positive result and a collectively broader island-wide experience with reform being another).

In most cases, tracing the impact of CSRD funding and CSRD models in Puerto Rico's CSRD schools will not fully reveal whether a particular school is engaged in comprehensive reform. Indeed Title I Consolidated Plans (which most Puerto Rico schools are required to fill out because of the poverty status of many of their students) seem to be a more common point of origin for at least some schools' comprehensive reform strategies. The amounts of funding and durability of Title I outweigh that of CSRD specifically, while the current 'schoolwide' orientation of Title I at least matches the desired comprehensiveness of CSRD. Thus, it should be neither surprising nor problematic that Title I Consolidated Plans are more often the starting point for comprehensive school reform in Puerto Rico than CSRD (which by statute lasts for a maximum of three years).⁸

In one impressive 'Lightspan school' that we visited—Escuela de la Comunidad Luis Muñoz Rivera in San Lorenzo—Title I implementation had initiated the now ongoing use of extensive

questionnaires for students, parents, and educators.⁹ Based on comprehensive needs assessment including student achievement data, that school knew well which areas of its instructional program needed improvement and also had information about how to build community support for particular efforts. Ironically, however, quickly ‘eyeballing’ the data the school had assembled, it appeared that social studies was disliked by a number of students and also was disproportionately struggled with, but we did not hear of any social studies intervention strategy (though nor did we ask). It is possible that the school is better at collecting data than at changing its own policy based on analysis of that data, at least in this instance.

At the first September evaluation workshop, before she knew in detail our intent for the workshop, one school director spoke at length about the need for clarification about how to align CSRSD with the comprehensive work schools were already doing with the Title I Consolidated Plans. From our perspective, it seems that evaluation of the comprehensiveness of reform initiatives at Puerto Rico CSRSD schools should often begin not with the CSRSD plan, but with the Title I Consolidated Plan or whatever other analogous document the school might have created. Moreover, CSRSD evaluations that reveal specific CSRSD expenditures supporting comparatively narrow change processes should be interpreted with a caveat asking whether comprehensive reform is nonetheless being supported in the school (with, for example, more enduring sources of funding than that available through CSRSD). Finally, it should be remembered that 80% of CSRSD funding originates in Title I and that CSRSD is intended as a means for extending and consolidating Title I school-wide efforts. To the extent there are apparent conflicts between CSRSD and Title I, it seems to make sense to resolve them by giving preference to Title I (which is the umbrella framework for CSRSD anyway). This appears to be the *de facto* solution of the Puerto Rico CSRSD schools we visited.

PUERTO RICO’S FOUR MODELS

For several reasons there are only four extant CSRSD models in Puerto Rico. Before describing those models, two reasons for the paucity of CSRSD models are worth mentioning. First, as the LAB discovered through organizing a 1998 model provider fair and from a telephone survey a number of CSRSD model providers were unwilling to try to work in Puerto Rico.¹⁰ This may reflect a lack of Spanish language materials and Spanish-fluent staff (and building such capacity would be costly); it may reflect the distance of Puerto Rico from model provider bases (making sites in Puerto Rico unprofitable because of transportation expenses and/or logistically difficult to manage); and/or it may reflect a dismissive regard for Puerto Rico on the part of mainlanders.¹¹ Second, PRDOE (perhaps as part of broader Puerto Rican governmental policy) requires island and mainland-based contractors to provide evidence of legal identity in Puerto Rico and nine other documents and/or certifications before authorizing model providers to try working in Puerto Rico. Though all serious model providers should ultimately be able to pass these paperwork requirements, the requisite process to do so is either lengthy and difficult or expensive if model providers obtain local legal assistance to expedite their approval.

Though we never did get to visit a CCC school during either trip, we were explicit about our desire to see the various models in action and we suspect that it was in overt if partial accommodation of this request that we were accompanied for a 2+ hour (each way) trip to see the ELOB school in Utuado. During the September 2000 visit we saw two Lightspan schools, one PRSSI school, and one ELOB school. In March 2000 we saw two other Lightspan schools. However, let it be noted that both ‘Lightspan schools’ visited in September also had PRSSI as part

of their curriculum, as did the ELOB school. (In other words, PRSSI forms part of the curriculum at many 'non-PRSSI' CSRSD schools in Puerto Rico.)

Though we did not see a CCC school in action, the CCC Coordinator for Puerto Rico did attend our first evaluation workshop (all the model providers were invited) and she was again interactive with us, as she had been in March 2000 when she was an invited presenter at the CSRSD site visit orientation meeting we had at PRDOE. The Coordinator and other PRDOE staff seem satisfied with CCC implementation to date. Unlike with PRSSI, we heard no complaints about CCC, but we also heard no reason to believe that it, on its own, is any more comprehensive than either Lightspan or PRSSI.

Further remembering our March 2000 site visitor training/meeting where Lightspan and CCC were lauded (and given extended time for presentations), where ELOB was mentioned just in passing (they were unavailable to present), and PRSSI was characterized more critically, it still seems the case that PRSSI is the only target of any PRDOE opprobrium at model providers. Figuring out why PRSSI is viewed negatively is not a straightforward task, though there are some straightforward parts to the story. For example, PRSSI provided no CSRSD-specific on-site professional development support to the 15 PRSSI CSRSD schools last spring (i.e., Spring 2000), despite promises to do so free of charge, though PRSSI has offered professional development and training on a yearly basis to schools that use PRSSI. As we try to make sense of this, it may be the case that PRSSI did not have the capacity to meet the new demand that arose from CSRSD. It may also or alternatively be the case that there was a lack of communication between CSRSD schools that had pledged to apply PRSSI and with the 'model provider' portion of PRSSI, so that PRSSI did not know what was expected of it, though it would seem incumbent on the model provider which has 'won' a school's interest and commitment to follow through on its side of the commitment (i.e., to figure out and provide what was necessary).

As of our Fall 2000 visit (i.e., September), there again had been little direct school support from PRSSI, though promises had been made to PRDOE that such support was forthcoming and that this time it would be for a fee. That PRSSI was intending to charge this year was viewed negatively by PRDOE staff, though other model providers also charge for the professional assistance they provide and the prospect of a fee seems to make it both likelier and more viable for PRSSI to offer site support. At the one 'PRSSI-only' CSRSD school we visited, the 1999-2000 school year funds were used to purchase equipment and materials that enhanced that school's infrastructure for implementing the model. (None of the recommended purchases were purchases from PRSSI.) The origin of this spending decision was unclear, but it was clear from just looking at the school's spartan physical plant that purchase of even rudimentary materials would enhance the school's educational delivery capacity. However, one would think that purchase of basic materials should come from a source other than the CSRSD budget, though we do not want to blame a school for responding to an obvious need.

Perhaps PRSSI's origin as an initiative co-developed by the University of Puerto Rico's Center for Science and Engineering (in collaboration with PRDOE), the General Council for Education (through a National Science Foundation Grant), and federal Dwight D. Eisenhower funds as the PRDOE's island-wide strategy for math and science reform is one reason for some viewing it with little favor. Perhaps this three partner collaboration was slowing PRSSI's responsiveness to school requests because it was accustomed to operating under different service and reporting requirements than those expected of CSRSD model providers and it failed to make the necessary adjustments, though again we offer this point as conjecture, rather than as an empirically grounded one for which we have firm data.

It seems likely that the triple alliance and the initiative's origin several years prior to the creation of CSRSD have influenced PRSSI's reception in another way, however. Created in 1994 or earlier (the materials we collected include planning information from 1994 – 1997 and an initial copyright in 1994, updated in 1997), PRSSI is intended to reform math and science curricula in Puerto Rico at all levels from Kindergarten to Grade 12. It was not initially intended as a CSRSD model, because CSRSD was not a reference point at the time of its creation. Since its creation, PRSSI materials have been shared with many public schools in Puerto Rico (indeed, as we have already written, both of the Lightspan schools and the ELOB school we visited in September had PRSSI materials too), though not necessarily as part of any integrated, comprehensive reform effort. What appears to have happened more recently, however, is an effort to re-label PRSSI as a CSRSD model. While the idea of PRSSI as a CSRSD model may at first seem far fetched—PRSSI does not seek to influence all areas of curriculum let alone other possible areas of school reform—when one considers that Lightspan and CCC are not on their own comprehensive either, that at least some educators in Puerto Rico are likely more disposed to champion an island-developed initiative over an imported one, that the U.S. Department of Education recommended PRSSI as a CSRSD model,¹² and that CSRSD can appear to be a prospective source of new/additional resources, PRSSI's attempt to re-identify itself seems more logical. Moreover, if CSRSD can be a source of supplies (for manipulatives, graphing calculators, and the like) that many schools cannot afford but that PRSSI requires then the attraction of a re-labeling becomes even more obvious. Last year's purported policy of offering free professional development to any interested parties seems consistent with PRSSI's previous strategy of trying to avail itself to any and all Puerto Rican schools. The new strategy of charging for development services may indicate a new awareness of the need to provide individualized attention to CSRSD schools (like other model providers do), which is where PRSSI has fallen most obviously short to date.

Similar to what we have found in other CSRSD schools in other states, the PRSSI school— Escuela Luis T. Baliñas—that we visited in Aguas Buenas was in its third year of using PRSSI, though it had only obtained its first CSRSD funding less than six months prior to our visit. This is to say that, as elsewhere, some CSRSD money in Puerto Rico is going to sustain/extend efforts rather than to initiate them. A quick review of the PRSSI workbooks that we were given to bring back to the LAB suggests that it may well be a useful, interesting, and effective curriculum. LAB staff who visited in Puerto Rico in 1998 as part of a solicited effort to identify potential locally developed CSRSD models came away with quite a favorable impression of PRSSI. (Indeed their recommendation that PRSSI could be the base of a CSRSD model seems to be one reason that PRDOE picked it as one of five recommended CSRSD models.)

During our visit in Aguas Buenas and in our conversations with PRDOE staff regarding PRSSI, we may have been witnessing/discussing a model in the midst of an awkward transition to a new policy environment (i.e., one where CSRSD is present). If that was the case, then we should be cautious not to rush to judgment regarding the quality of the PRSSI initiative, though we might want to devote energy to thinking about how PRSSI, like Lightspan and CCC, might better fit as a component of a comprehensive initiative (Title I originated?). Such a perspective drops any pretense of PRSSI, on its own, being comprehensive. It also suggests a PRDOE role in developing PRSSI's capacity as a CSRSD model provider. While this would not be a normal or even normally desirable role for an SEA, in this instance, an island-developed, popular (as measured by its ubiquity) curriculum is at stake, with problems (i.e., an incomplete transition) that could be readily fixed. Whether the 'carrot' of further PRDOE support of PRSSI or the 'stick' of threatening to withdraw CSRSD funding to PRSSI/CSRSD schools would be the better method to remedy the current inadequacy of PRSSI's responsiveness is not immediately clear to us, however.

Lightspan's success in Puerto Rico in getting itself adopted as the CSRD model at 52 of the 75 CSRD schools on the island speaks to the competence of its organization and school support infrastructure. As we noted during our visit in March and saw again at the September training workshops, Lightspan staff have gained the confidence of PRDOE staff—indeed last March the then CSRD Coordinator seemed quite willing to accept Lightspan logistic support with overall CSRD program administration—but island-based Lightspan staff seem also to have won the clear confidence of the Lightspan/CSRD schools we visited. As noted earlier, a probable factor in Lightspan's success in Puerto Rico is its alignment with the goals of improved technology access and English literacy instruction that are current island-wide educational priorities. These are not just SEA-level priorities, however. Lightspan has also made itself available at schools to mentor teachers, staff, and parents in locally acknowledged areas of weakness (i.e., English language arts and technology integration). To the extent Puerto Rico participates in the national anguish regarding mathematics instruction (and the creation of PRSSI suggests that it does), then Lightspan's mathematics component stands as additional reason for its being viewed favorably.

During our visits to Lightspan schools both this trip and in March, we heard no complaints about the technical assistance provided by Lightspan, but we did hear that Lightspan staff were frequent welcome presences at those schools. At none of the Lightspan schools did we hear school staff characterizing Lightspan as a self-contained model for whole school reform, though we did sometimes see Lightspan staff helping with tasks (e.g., parent involvement with the school) that are not immediately suggested by the model's curriculum focus, but that are federally required as components of CSRD. Whatever the federal understanding of the role of models in relation to CSRD and whole school reform, in Lightspan schools in Puerto Rico there does not appear to be a presumption that Lightspan is a singular vehicle for holistic restructuring. Rather, Lightspan is a source of targeted assistance often supporting comprehensive school reform being carried out within the Title I schoolwide framework. In March, we were favorably impressed during a visit to the *Escuela José de Diego* in Dorado by the inclusion of parents in Lightspan activities. Parents used Lightspan in an adult/parent education program held on the school's campus and, like their children, were permitted to borrow Lightspan materials including Sony equipment for after school use at home. Parents were enthusiastic about Lightspan and about their children's school. Teachers reported that Lightspan was a positive influence in helping their students learn English. Teachers also noted Lightspan's assistance in aligning the school's core curriculum, in some cases aligning Lightspan with PRSSI (and with other curricula).

Finally, as partially noted earlier, ELOB seems to stand out as substantially different from other CSRD-supported models in Puerto Rico. It does, on its own, seek to be the impetus for whole school restructuring. Based on our visit to Utuado, educators at that school seem enthused by the promise of ELOB in spite of their concern with the strain it places on some school staff (such as the guidance counselor who has 'double duty' as ELOB coordinator plus all of her traditional counselor responsibilities). However, it is also the case they have not yet gone far in relation to its implementation. This fall (Fall 2000) all faculty are expected to help develop one expedition (a comprehensive, interdisciplinary, curriculum unit), which, while profoundly different from their regular practice, leaves most of their time for traditional modes of operation. As yet, faculty in Utuado have not had to face decisions where an existing practice needs to be terminated to free up time or other resources for a deeper school engagement with ELOB. When such moments come, the viability of ELOB will be more severely tested than it has been so far. Based on the promise of a newly-created first grade 'expedition' that includes class visits to various students' households as part of a general study on families, ELOB in Utuado may brilliantly bridge school/community and school/parent gaps (as well as tackle other priorities identified in the 9 CSRD components), but that is still more promise than realization. By empowering faculty to be

sometime curriculum developers, ELOB seems consistent with the decentralizing spirit of Puerto Rico's 1994 education reforms. Nonetheless, a third Puerto Rico school that had started to implement ELOB as a CSRSD model, decided to drop its model affiliation and CSRSD funding after determining that ELOB necessitated too many changes from its traditional ways of operating, while not being satisfactorily responsive to that school's specific request for substantially more support with technology integration.

As noted earlier, with just two schools on the island implementing its model, the economic viability of ELOB's continued presence in Puerto Rico is cause for concern. With ELOB as its best and most established example of CSRSD-supported whole school restructuring, PRDOE should strongly consider ways of enabling ELOB's continued presence on the island. Doing so would complement the federal funding ELOB was awarded to create Spanish-language curricula and other materials to support its foray into Puerto Rican education. ELOB may not be the right model for all or most schools on the island (though it may), but its foray into making the community a classroom, involving teachers in collaboration and formal curriculum development, and promoting interdisciplinary inquiry may each usefully inform how schooling is conducted at non-ELOB schools in Puerto Rico.

REFLECTIONS ON THE LAB AND PRDOE CSRSD EFFORTS WITH PUERTO RICAN EDUCATORS

Since CSRSD was initiated, PRDOE staff, like staff at other SEAs, have endeavored to understand what they were supposed to do. What they have in fact done is a product both of this interpretative act (including support in that interpretation from LAB staff and other non-PRDOE sources) and their application of previous habits and ways of operating to this new task. Because CSRSD has partially been a 'learn as you go' experience at the SEA-level (complicated in Puerto Rico's case by the turnover of designated CSRSD coordinators), the point of this segment is not to malign anything that has happened so far. However, because the initial learning phase is or should be over (as exemplified by the initiation of a new round of CSRSD proposal solicitations), this does seem an appropriate occasion to appraise lessons learned and to consider habits that may be problematic or worth changing to improve island-wide program implementation. Our primary source for these suggestions is the review of September workshop evaluation sheets and we consciously include ourselves in the category of institutional entity that could and should learn from the feedback provided by those (i.e., school-based educators) on whose behalf we work. In other words, these are not just observations of and recommendations for PRDOE.

Feedback at the September evaluation workshops was largely positive, but to the extent there were recommended arenas for improvement, schools' complaints about inadequate advance notice of the workshop rang loudest. Attendance at both workshops was reduced because some schools could not or did not adjust school leaders' schedules at the last minute. (Schools had less than a week's notice from PRDOE prior to the date of the workshops.) Of those who did make it, many resented the logistic adjustments they had to go through to be able to attend. Those immediate problems could have been avoided had there been better advance notice. In fact, to capture the possibilities of CSRSD-school-to-CSRSD-school networking and to ensure happier compliance with requests for participating in workshops, PRDOE should consider developing an annual calendar for SEA-initiated/facilitated CSRSD events. Such a calendar would also give PRDOE longer lead-time to request assistance from the LAB. Regarding the current last-minute and somewhat improvisational scheduling protocol, a number of LAB staff and PRDOE personnel explained to us that PRDOE only sends out correspondence signed by the Secretary or

Undersecretary of Education as they are the only ones approved to convene large numbers of teachers, school directors, or superintendents and excuse them from their daily duties for professional development or other meeting purposes. This 'top-down' requirement is anachronistic and inconsistent with Puerto Rico's 1994 decentralization reform. If this approval process is the reason for consistent last-minute inconvenient notice then old habits like these need to be discarded.

Another complaint at the workshops that the LAB needs to consider seriously was the predominance of English in our presentation and supporting materials. While many workshop participants were adeptly bilingual, nearly all were more accustomed to using Spanish and some clearly struggled with English. While the LAB's Puerto Rico Liaison (the second author) and this report's lead author both spent much of the workshop orally translating materials to assure comprehension (and were praised for our efforts), there are few good rationales for the LAB to either lengthen workshops (to allow for translating) or to limit comprehension by using a language with which participants are less familiar. The needed solution is for the LAB to develop further Spanish language presentation capacity and to have more Spanish language support materials.

A third issue that came up was the inadequacy of the workshop facilities for supporting interactive training. Both September workshops were in auditoriums with seats bolted to the floor. Group discussions involving even three people were difficult in such an environment. Comprehensive school reform requires changes in SEA/school relations and habits of interaction (Lusi 1997), with state agencies no longer seeing their role as disseminators of excellence to which schools only need listen and take heed. As part of the same reflective process that would yield a year-long schedule for SEA/CSRD school interaction, PRDOE officials (perhaps with LAB assistance) could strategize about new workshop logistics that would support greater interactivity and that would be consistent with Puerto Rico's 1994 restructuring which gives school leaders more autonomy in both guiding their schools and identifying/soliciting sources and means of professional support.

CONCLUSION

Though this entire report is consciously brief to facilitate reading, this final segment is presented in a bulleted format with specific audiences identified for the various provisional recommendations and conclusions that are shared. Because we were not in any Puerto Rico CSRD school for an extended length of time (our longest site visit lasted 4+ hours in Utuado), we refrain from offering any school-site-level suggestions.

For U.S. Department of Education

- ◆ Asking whether CSRD is initiating comprehensive reform in Puerto Rico seems like an unwittingly misplaced question. Rather, those who wonder about whether school reform in Puerto Rico's CSRD schools is comprehensive should look at the broad array of changes being carried out because of Title I or island-initiated reforms. In most CSRD schools on the island, CSRD expenditures are modest complements to broader initiatives, though, as noted, whether even those restructurings are sufficiently broad is unclear, as the radical change in school site management has not been complemented by changes in the daily organization of elementary schooling, for example.
- ◆ Before criticizing the broad introduction of Lightspan at Puerto Rico CSRD schools, it is worth remembering how the Lightspan curriculum is specifically responsive to several educational priorities identified by Puerto Rico's Commissioner of Education: technology

and English. Moreover, it is worth remembering that Puerto Rico has a paucity of teachers fully fluent in 'cognitive academic' English and has a substantially lower per student educational expenditure than any U.S. state, which makes alternative access to English language instruction attractive and supplementary vehicles for introducing technology into schools that much more imperative. Finally, it is worth remembering that 'Lightspan schools' in Puerto Rico were among the most impressive CSRD schools that we visited. Remembering Stringfield *et al.*'s (1998) finding that the research base 'supporting' most CSRD models did not include studies of model's effectiveness with English language learners or in substantially different educational contexts, caution should be taken before extrapolating that any Lightspan inadequacies alleged on the mainland are automatically applicable to Puerto Rico. Indeed, to remedy the inadequacy found by Stringfield *et al.*, the U.S. Department of Education may well want to look actively at chronicling the experience and impact of CSRD model providers in Puerto Rico as a way of broadening the comprehensive school reform research base.

- ◆ The U.S. Department of Education should be intrigued and concerned by the finding of the LAB's 1998 telephone survey that a number of mainland CSRD models are unwilling to try to support their model's implementation in Puerto Rico and/or lack sufficient materials in Spanish to do so effectively. (The availability of materials only in English also raises issues about the accessibility of models to English language learners on the mainland and, notably, their accessibility to those students' parents who presumably are incorporated in CSRD component #6's insistence on parent involvement.) The federal department needs to consider that there are higher operating costs for mainland model providers to work in Puerto Rico (costs related to travel, local logistic support, and assuring that model-related materials are available in Spanish). As such, the department should recommend increased CSRD allocations per school and should help secure the resources that would make that viable. Such additional funding should increase the number of models available to Puerto Rico schools and should ease the economic challenges that current model providers, notably ELOB, have taken on just to initiate a presence on the island. The issue of identifying additional island-initiated reform frameworks should also be revisited.

For Puerto Rico Department of Education

- ◆ Most fundamentally, the PRDOE needs to consider whether it wants CSRD to be only a 'shoring up' program (helping schools fill gaps in their English and technology instruction for example) or whether it wants CSRD to be at least sometimes a vehicle for whole school restructuring. Perhaps a third option would be to insist on CSRD schools articulation of how CSRD as a finite school program fits into broader attempts at reform initiated by the 1994 change in Puerto Rican educational statute and/or the changes in Title I. Clearly, U.S. Department of Education rhetoric supports the goal of whole school restructuring, but just as clearly the approved CSRD implementation plans at many schools across the country have the more modest aim of shoring up weaknesses. If PRDOE wants at least some of its CSRD effort to contribute directly to whole school restructuring then, based on current levels of deployment, ELOB seems to be currently the best positioned CSRD model provider to enable that outcome. Conversely, Lightspan (most likely), CCC, and PRSSI may illustrate the potential successes of the 'shore up' strategy. The point here then is not to argue for or against any particular model, or even for or against any particular strategy, but rather to pose explicit questions to PRDOE about what it hopes to learn and accomplish and what it might learn and accomplish through CSRD. While we found

abundant evidence of what PRDOE hopes specific schools will accomplish by way of CSRSD (i.e., improved student achievement), we did not find much evidence of considerations at PRDOE of possible SEA-level and island-wide learning that CSRSD might permit. There is an SEA-level opportunity that so far is not being seized.

- ◆ Like state education agencies (SEAs) in other parts of the U.S., PRDOE staff have been required to ‘learn as they go’ as they have tried to understand what, when, and how they were supposed to implement CSRSD and how, within those parameters, they might realize various educational priorities of the island. Within that context, uncertainty and improvisation might be expected. However, as the CSRSD process gets more settled, it is now time for PRDOE to consider deliberate ways it can enable and add value to schools implementation processes. Creating an annual calendar for CSRSD professional development activity (which would include review of some mandatory CSRSD activities like school-level evaluations) would be one vehicle. Strategizing about how to position schools to learn from each other would be another. (While grouping by model would be a natural strategy for such peer learning, PRDOE should also consider how schools could learn from other schools that have adopted different models.) Documenting and disseminating CSRSD schools’ learning and implementation experiences would be a third way PRDOE could add value to individual school’s implementation efforts.
- ◆ With Title I consolidated plans playing such an obvious *de facto* role in making most Puerto Rico CSRSD schools’ reforms comprehensive, considering ways to strengthen the coordination between Title I and CSRSD seems commonsensical. Moreover, as the three years of CSRSD funds begin to run out at various sites, Title I may become an increasingly important source of support for sustaining CSRSD-initiated activities. Thus, it is already time to consider what CSRSD schools face after CSRSD funding runs out; Title I will likely play a role in many schools’ answers to that concern.
- ◆ Given the unwillingness of at least some CSRSD model providers to come to Puerto Rico (and several other reasons), the PRDOE’s impulse to seek a local source for a CSRSD model seems pragmatic. However, now that PRSSI has been named as a CSRSD model and 15 schools are making claims to be PRSSI implementers, it is time for PRDOE to troubleshoot and otherwise provide support that will facilitate PRSSI’s successful transition into being a CSRSD model. (Naming it a CSRSD model was one step, now helping it develop the capacity to ensure that it becomes so comes next.) We are not sure of the most efficacious strategy for improving PRSSI’s performance as a model provider, but we do think this is a priority issue that merits explicit and near-term PRDOE attention.

For LAB at Brown

- ◆ As part of the logistic planning for the first Puerto Rico model developer forum, in 1998 a student intern at the LAB unwittingly uncovered a systematic problem that confronts PRDOE as it tries to support CSRSD implementation on the island—many providers are uninterested in coming to the island. While the 1998 research consisted of telephone interviews with model providers raises some important points, a more systematic inquiry into this dilemma may more convincingly demonstrate that Puerto Rico as a whole confronts a problem similar to a number of rural schools (i.e., reduced model choice because of model provider unwillingness). Further compounding Puerto Rico’s challenges are the need for materials in Spanish and legal logistics of operating on the island. Only this last is within Puerto Rico’s control. For the other two, the LAB should consider a more systemic research process that would forcefully argue that Puerto Rico deserves extra

consideration/support if it is to be on equal footing with other CSRD-implementing jurisdictions.

- ◆ As a consistent *modus operandi*, the LAB should have abundant materials available for use in workshops that appropriately should be conducted in Spanish (the first language of our third largest service jurisdiction).

ENDNOTES

1. After the lead author, Dr. Hamann, wrote an initial draft of this document, he shared it with two colleagues—Brett Lane and Patti Smith—who had also visited Puerto Rico during same week in September 2000. Mr. Lane and Dr. Smith both supplemented and adapted the original account, then Dr. Odette Piñero, substantially revised it, before Dr. Hamann wrote the final draft. Dr. Piñero is the Northeast and Islands Regional Educational Laboratory at Brown University's (LAB) Puerto Rico Liaison. She has had her office at the Puerto Rico Department of Education's main building since prior to CSRSD's original instigation. She is deeply familiar with school and policy issues across the island and has worked closely with Lightspan. Hamann and Smith are both Research and Development Specialists at the LAB; Lane is the LAB's Program Planning Specialist for CSRSD.

The original impetus for the September trip to Puerto Rico was an invitation to Lane by PRDOE staff to come to Puerto Rico to conduct two workshops on CSRSD-related school-site self-evaluation. After a PRDOE-initiated change in the workshop presentation schedule, on Tuesday, September 12, 2000, Lane, Hamann, and Piñero, and PRDOE CSRSD Coordinator Victor Quiñones led the first workshop in Arecibo, Puerto Rico. On Friday, September 15, 2000 the workshop was repeated in San Juan with Smith replacing Hamann (who had left Thursday evening). Following up on a practice initiated during Lane's and Hamann's visit to Puerto Rico in March 2000, site visits to CSRSD implementing schools were added to the agenda for this visit at the LAB's request.

2. While still in Puerto Rico, "scratch notes" (Ottenberg 1990: 148) were recorded *in vivo* during school visits and workshops; i.e., a hand-written record of interaction was collected as it happened that was partially converted later into more conventional field notes. In addition, site documents from visited schools and from PRDOE were collected and reviewed as part of the drafting of this report.

3. When this report went to press the Commissioner of Education in Puerto Rico was still Secretary Fajardo. Since then, however, a new Commissioner has taken office who may well not share Commissioner Fajardo's priorities. The references in this report to current practices and current priorities allude to the practices and priorities under Commissioner Fajardo.

4. While Puerto Rican education is officially bilingual, that usually means all students have an English language class as part of their day, but that all other academic subject areas are taught in Spanish. Based on our experience leading workshops with Puerto Rican educators, all or nearly all Puerto Rican educators have some familiarity with English, but many fall well short of fluency and nearly all know and use Spanish as their first language. The history of English language education in Puerto Rico is long, complex, and controversial. Colonial (i.e., early 20th century) attempts to have school instruction be only in English are bitterly remembered, while the use of Spanish continues to be a means for asserting a Puerto Rican identity separate from that of the mainland (Resnick 1993). While acquisition of English fluency and literacy are formal PRDOE goals, many students and educators bring high affective filters to that task inhibiting their realization of that goal. While this paragraph just scratches the surface of language issues in Puerto Rican education, it should suffice to support the points that the current means and apparent degree of success at supporting students' full development of English language proficiency seem insufficient (in relation to PRDOE's goal of promoting bilingualism).

5. Stringfield, *et al.* (1998) point out that none of the CSRSD models widely promoted in the mainland U.S. were initially designed for English language learners (ELLs), nor was their efficacy with ELLs tested. The premise then that the research-base for mainland models will hold for Puerto Rico is thus often both presumptuous and unproven.

6. We never directly asked school administrators whether they felt the 1994 decentralization of school governance meant that they thought of their schools as restructured or restructuring. If they did, then any intrinsic invitation for restructuring embedded in CSRSD could reasonably be viewed not as initiating a process, but instead as enabling its continuation.

7. Though not part of CSRSD, Dr. Ilia Laborde's school reform efforts in Aibonito may also be an example of attempted comprehensive restructuring. The LAB continues to watch and support her work with interest.

8. The predominance of the Title I framework versus CSRSD probably also reflects the current novelty of CSRSD (with Puerto Rico CSRSD schools only getting their first funding in the spring of 2000), while schoolwide Title I efforts date back as far as 1994.

9. As an aside, the school site director was pleased by and orally assented to our request to post copies of their questionnaires on our website.

10. Of 16 surveyed CSR model providers, 10 said they were uninterested in working in Puerto Rico and/or lacked Spanish language resources to do so. Of the 6 that indicated an interest, one claimed that it could get assistance from ex-staff who were Puerto Rican. Another, ELOB, conceded that it did not yet have any Spanish materials (though subsequently they have developed many with support of a U.S. Department of Education grant specifically intended for that purpose). ELOB was the only one of the 6 favorable respondents to actually become a Puerto Rico CSR model.

11. At the November 1, 2000 CSR model design fair recently held in Puerto Rico, several mainland CSR model providers that currently are not present on the island (e.g., Success for All, Accelerated Schools) participated. Whether any schools subsequently decide to use these new models and whether these model providers determine that logistic hurdles and perhaps limited starting numbers are worth overcoming both remain open questions.

12. In 1998, two Rhode Island-based LAB employees, Dr. Piñero (the second author), and a U.S. Department of Education representative visited several Puerto Rico schools that were enacting various local and/or island-originating reforms. The goal was to identify possible Puerto Rico-origin models for CSR. Dr. Piñero and the two other LAB employees recommended three models—PRSSI, Magic Carpet, and Dr. Laborde’s Global Education model (referred to in *endnote 7*)—but the U.S. Department of Education representative thought only PRSSI had established enough research ‘proof’ of its effectiveness and capacity to be “scaled up.”

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Appendix A:

Documents and materials collected during September 2000 site visit

MATERIALS BROUGHT BACK TO THE LAB (FROM SECOND SITE VISIT):

- Cuestionario de Padres Departamento de Educación Oficina Superintendente de Escuelas—San Lorenzo, Puerto Rico. (An 11 section, 30+ question questionnaire in Spanish that asks parents to report their own schooling level, their student's living circumstances, their degree of orientation regarding various school activities, areas in which they might want parent education, a list of activities they would be willing to volunteer for, and more)
- Cuestionario de estudiantes de la Escuela de la Comunidad Luis Muñoz Rivera—San Lorenzo, Puerto Rico. (A 45-item Spanish language student questionnaire asking about curriculum, school services, likes and dislikes, study habits, and more)
- A 5-page untitled teacher questionnaire (in Spanish) that reviews areas of teacher training (by topic and degree level), availability for professional development outside school hours, opinions regarding Title I, classroom strategies and needs, and more.
- A sample Título I Plan Consolidado (in Spanish) from the Escuela de la Comunidad Luis Muñoz Rivera
- A sample Informe de Progreso (in Spanish) from the Escuela de la Comunidad Luis Muñoz Rivera that explains to the PRDOE what CSRD-related activities that school engaged in during the first year (actually 3 months) of CSRD funding. The Informe de Progreso is a formal document or questionnaire that the school fills out then returns.
- A sample ELOB expedition for first graders (described in Spanish) prepared by teachers at the Escuela de la Comunidad Acreditada S.U. Inocencio A. Montero—Utuaado Puerto Rico. The expedition is entitled “La Familia a través del mundo” (“The Family Across the World”).
- Notes and site documents from the LAB-supported model showcase for Puerto Rico CSRD (held at the Hotel Caribe Hilton in San Juan on April 21, 1998)
- “Cambios y Mas Cambios: Guía de los Estudiantes Sexto Grado” (a Sixth Grade Human Physiology/Biology student guide [in Spanish] created and distributed by PRSSI)
- “Matemática Dinámica: Laboratorios (nivel 4) Unidad 1 (A fourth grade math workbook [in Spanish] also created and distributed by PRSSI)
- A sample Guia de Visita site visit formative evaluation protocol (in Spanish) (used during PRDOE year 2 school site visits)