CRPE
REINVENTING PUBLIC EDUCATION

RESEARCH BRIEF

Launching districtwide innovation: Lessons learned from a year of pursuing "Bold Ideas" for systemic change

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Executive Summary

Slow and incremental improvements are no longer enough to help school districts meet the challenges they face. Instead, districts must enact bold, innovative, and durable systemwide shifts. To both encourage these shifts and learn from districts' attempts to implement them, CRPE funded and studied pilot programs in 11 districts during the 2023–24 school year. Each of these districts had a "Bold Idea"—defined as an innovative initiative designed to "make student learning more joyful, individualized, and relevant"—and met conditions for "readiness" to address the barriers inherent to creating durable change.

Readiness was a crucial selection criterion because we knew that, throughout the pilot and early implementation process, districts would inevitably encounter factors that inhibited true systemic change. Over the course of the study, seven key challenges came up again and again—along with lessons learned from meeting those challenges head on. Broadly, we saw that leadership mattered. To succeed, pilots needed committed, executive-level champions, as well as succession plans for what would happen if those champions left the districts. Pilot teams needed change-management strategies, relationship-management strategies, and political savvy to secure support from key constituents, like teachers and policymakers. Collecting user feedback data also allowed pilot teams to stay nimble and adjust course when necessary.

Despite the fact that these 11 districts had been identified as the most ready to create systemic change, we found that being ready did not prevent them from experiencing challenges—what set them apart was their ability to navigate these challenges by using specific change management strategies to address specific problems.

Our findings are preliminary, and we do not know what will become of these pilot programs as they scale up in later years. But this early discussion reveals some of the frequent challenges encountered by those districts pursuing innovative, systemic change, and we will continue to study the lessons learned in the three districts funded in a second phase of this project.

Introduction

School districts must evolve to meet the demands of an ever-changing world and harness bold ideas and innovations that reimagine how schools operate, how students learn, and how educators receive support. Districts' goals cannot be to fix isolated problems with incremental improvements but to transform policies, practices, and mindsets across school systems in ways that lead to equitable and enduring outcomes for all students.

During the 2023–24 school year, CRPE had an opportunity to fund and study early phases of efforts to transform policies, practices, and mindsets in 11 school districts and charter management organizations (hereafter, simply districts). We selected these districts because they each had a "Bold Idea" (which we defined as an innovative initiative designed to "make student learning more joyful, individualized, and relevant") and had demonstrated "readiness" to tackle the most common challenges to innovative systemic change (see the "Why we undertook this project and what we did" sidebar for more detail on "readiness"). We documented the learnings from their experiences to help inform future efforts to drive and scale innovation in public education, to address persistent inequities, and to reimagine how students learn.

The districts' Bold Ideas ranged widely, from leveraging AI to support students' holistic development and generating project-based learning units aligned with students' interests to designing a virtual system for students across the district to take synchronous online courses (see the "Districts' Bold Ideas" sidebar for more detail on the various initiatives). These school systems were not starting from scratch or piloting an isolated project; they had plans to eventually scale their Bold Ideas to shift instruction systemwide. Over the 11 months of our study, we anticipated that the districts would face barriers to change, which is why we chose to support projects that demonstrated readiness. Of the 11 sites, we went on to select a subset of three districts to continue to fund for deeper implementation in Phase II of the project.

Summary of what we learned in Phase I.

As expected, each Bold Idea pilot team—the district staff assigned to manage the pilot—faced challenges. Some Bold Ideas lost momentum or were superseded by newer initiatives; others had difficulty building teacher buy-in, enlisting principal participation, keeping track of evidence about progress, or navigating changes in senior leadership. No system, no matter how ready it seemed in advance, was free from serious challenges and barriers, even at the pilot stage.

We did, however, cull several important lessons from these systems' experiences that can help inform future school system innovation efforts, as well as funder investment strategies:

- A committed executive-level champion and adequate pilot team capacity are essential elements to sustain a new initiative against competing priorities.
- Pilot teams need sophisticated change management and training strategies to bring key constituents along—and these strategies need to change over time as new staff join the pilots. For example, teachers must understand how the Bold Idea will improve their instruction or outcomes for their students, while principals should play a leadership role through the earliest phases.
- User feedback data, ideally systematically collected, can help pilot teams adjust course.
- Savvy relationship and political management strategies can help address policy barriers.
- To prevent initiatives from going off the rails when top leaders depart (the leading challenge in the districts we studied), sustainability and succession plans are essential. Building community support and national attention can help sustain momentum but is not a guarantee.

To keep momentum, pilot teams had to remain nimble and address more than one of these challenges at a time.

We wrote this data note for people in districts trying to lead innovative systemic change or those who are trying to support them. We aim to illuminate emerging strategies and lessons learned drawn from recent examples of districts pursuing innovative change (see sidebar). Our early data suggest actionable insights and thought-provoking ideas on what it takes to bring about meaningful innovative systemic change—or districtwide change that uses novel solutions to address challenges in teaching and learning and emphasizes a willingness to depart from tradition.

CRPE will continue to study a subset of these districts for the next two years to understand how, if at all, they can undertake lasting and innovative efforts that fundamentally alter how they educate their students. Stay tuned for new findings as these districts move out of the pilot stage and into scaling for systemwide impact.

Why We Undertook This Project and What We Did

In early 2022, coming out of the pandemic, CRPE and the Walton Family Foundation saw a need and an opportunity for school districts to undertake systemic innovation. Far too many students were not making the progress necessary to recover from their pandemic-related learning losses (the need), while the pandemic provided an impetus to substantially change the status quo (the opportunity).

To find school districts to participate, we first asked leaders in the field to nominate districts in the early stages of designing and piloting "Bold Idea" initiatives. To be considered for the project, the initiative needed to aim to shift the core of instruction and students' experiences—in part because we wanted the project to support improved outcomes for students but also because we know from existing research that shifting the so-called instructional core is one of the trickiest parts of the educational system to change[1]. Initiatives selected also leveraged—especially parents, community, and other assets outside the district—in new ways.

We then used the existing research on systemic change to identify five keys to durable and innovative system change and assessed each district's readiness to address these challenges. We wanted to find districts that had worked deeply with their communities to identify a critical problem to solve, defined a theory of action linking their Bold Idea to new visions for student experiences, demonstrated leadership support and central office buy-in, and developed a plan to launch pilots to test their ideas.

In all, we invited about 100 districts to apply for the grant and received 52 letters of interest. We conducted a rigorous application process and ultimately selected 11 school districts and CMOs that we believed were the most ready to make systemwide changes. Each had a Bold Idea and met many of the conditions for systemic change suggested in the research. Participating districts received a $136,000 grant to support their pilot and their central office leadership participated in a learning cohort and coaching program.

Over 10 months (August 2023–June 2024), CRPE tracked their efforts to undertake lasting and innovative systemic change. During that time, we conducted 82 interviews with pilot teams, district leaders, principals, and technical assistance partners or coaches in each system. Our interviews focused on whether durable changes had emerged within districts and examined how change efforts had unfolded, including the change management strategies employed by leaders and the challenges encountered during implementation. Interviews also explored how structures, relational dynamics, and mental models enable or inhibit durable change. Additionally, we observed four cohort convenings (two in-person and two virtual), in which grantees viewed and discussed their in-progress systemic innovations and collaborated to consult on systemic challenges and share best practices.

1 To learn more about each districts' Bold Idea, please visit the "Phase I" section on this webpage: https://crpe.org/school-system-innovation-2/#systems

Districts' Bold Ideas:

Below are short descriptions of the 11 districts' Bold Idea pilots, divided into three categories:

- **Leveraging AI technology to support student learning:**
  - Launch an "AI Future Readiness" pathway to prepare students for a technology-driven workforce by integrating an AI-focused curriculum across all subjects in a K–12 school cluster, with the goal of expanding systemwide.
  - Create an AI-powered project-based learning platform that generates personalized project ideas for students; the project also connects students and teachers with professionals for expert feedback and career exploration.
  - Build an AI-powered platform to support students' social-emotional and academic development by providing tailored recommendations and academic resources aligned with each student's interests and strengths.
- **Developing competency-based data and assessments:**
  - Develop a competency-based data and assessment system focused on student well-being and gainful employability, anchored in the system's "Portrait of a Graduate."
  - Build a competency-based assessment system that enables students to demonstrate mastery in new ways while supporting teachers in evolving instructional practices and designing authentic assessments aligned with the system's "Graduate Profile."
  - Redesign high school report cards to reflect holistic student experiences, incorporating measures of mastery, college rigor, self-regulation, critical thinking, and personal growth; the new system prioritizes social-emotional learning and family engagement to better support student success.
  - Partner with school systems to pilot a new learning management system, competency tracking platform, and coaching model—all to support personalized pathways through competency-based learning portfolios.
- **Expanding options to meet community needs:**
  - Accelerate academic instruction and enrichment programs by scaling evidence-based learner-specific strategies in choice schools and pilot programs.
  - Engage students in solving real-world community challenges through a new instructional model that integrates literacy and numeracy skills, exposure to employment opportunities, SEL practices, and personal growth data into six-week action and reflection cycles.
  - Expand access to a broader range of advanced courses through virtual learning opportunities in a high-quality synchronous online system taught by expert teachers to all students, including those in rural areas.
  - Launch culturally affirming schools that partner with community organizations to center instruction on students' identities, histories, and languages; learn from and with these schools to refine curriculum, instructional practices, and schoolwide supports that enhance student success.

FINDINGS: How School Districts Navigated Expected—and New—Challenges to Innovative Systemic Change

We expected to see challenges in these 11 districts; in fact, our study was designed to track challenges as they emerged and follow how district-level teams assigned to lead the pilots and other district leaders responded. We saw seven key challenges come up again and again, which we explore in depth in the following sections. We show how districts navigated these challenges, and discuss the lessons they learned that helped their Bold Idea pilots to keep going.

1. To keep their Bold Idea a priority, districts needed an executive-level champion and well-staffed pilot teams.

During Phase I, six districts in our study had trouble maintaining their Bold Idea as a strategic priority. Absent this prioritization, the Bold Idea could get lost amongst other district priorities, fall out of favor with district leaders, or have pilot staff and critical resources pulled to other initiatives.

In at least three of these cases, the districts were trying to implement numerous initiatives, and their Bold Idea got lost in the shuffle. One system, at the end of our study period, counted the number of "strategic initiatives" their district currently had underway—and the number was over 400. The pilot lead remarked, "Some of those are tiny little partnerships and others are big, behemoth strategic initiatives … But [the district does] too many things. We don't say no to enough things." Needless to say, this pilot team struggled to maintain focus on their system's Bold Idea, even though it was closely related to other, high-priority initiatives. In another district, a pilot began to lose priority when its lead was assigned additional duties. As the lead said, "The work [of our Bold Idea pilot] is now being impeded because I'm stretched thin and incapacitated just doing the day-to-day [work] that our district has."

The result of losing priority meant that progress stalled—though, in some cases, progress restarted once staff were no longer pulled to other initiatives or priorities. In at least one system, leaders made a strategic decision to discontinue the Bold Idea pilot due to a shift in district leadership priorities.

In other cases, the effects of having too many priorities were more subtle: pilot teams were overextended and felt like they were not able to do a good job on anything; pilot projects were subsumed by other, larger or more urgent projects. In each of these six districts, deprioritization meant that the Bold Idea could simply be ignored by school-level or central office staff.

Lessons learned

We observed two main strategies that helped districts maintain prioritization of their Bold Idea—and, in two cases, reestablish their Bold Idea as a top priority after a period of distraction.

First, these pilot teams had **an executive-level champion with routine presence in district decision-making meetings** who was able to argue for resources and policy changes that would help the Bold Idea. These leaders avoided a natural instinct to go about the often-messy work of standing up a pilot on their own and instead used these meetings to involve other district leaders early and often. This involvement helped them to maintain prioritization because they were able to build awareness about the initiatives, advocate for necessary policy changes, and build cross-departmental support.

To illustrate, a senior leader in one system, who sat on the superintendent's cabinet, successfully advocated for regrouping all of the schools implementing their Bold Idea into the same network so that principals could share expertise and work with a supportive network leader. In another district, the pilot lead used monthly meetings with a technical assistance partner to build awareness and support for the Bold Idea. As the lead described them, the meetings included "our superintendent, deputy superintendent, our assistant superintendent

of teaching and learning, our teaching and learning coordinators from different content areas, our counseling team. So that's really when we have our big cross-collaborative group meet monthly so that everybody's informed of the work and all of the updates that are going on."

Second, these pilot teams **maintained robust staffing or added staff**, which allowed them to maintain capacity for the pilot even as individuals were pulled toward other demands. Having a cabinet-level leader and at least one part-time staffer devoted to the Bold Idea pilot meant that these districts were able to pursue state and other funding to cover pilot and design costs, work with other central office departments to remove implementation barriers, and remain responsive to opportunities and challenges. At least three districts used their pilot staff to pursue state funding that they were able to put toward teacher training. Another system, pinched for internal capacity, leaned heavily on an external technical assistance provider (subsidized in part by our grant) to support their Bold Idea while the district staff worked to build support for the initiative among school board members.

2. To build teacher buy-in, districts needed a powerful, personalized "why"—and not to make the Bold Idea seem like an extra.

Almost immediately after designing their Bold Idea, leaders set about gaining teacher buy-in—or teacher willingness, or even excitement—for the initiative. In doing so, leaders encountered varying degrees of skepticism. In some districts, teachers didn't readily see how the Bold Idea would improve their work or their students' learning; in other districts, teachers were overwhelmed with the tasks of Covid recovery and resistant to anything they saw as "one more thing." Each Bold Idea needed teachers' full participation to be able to shift the learning experiences of students—a key element of systemic change.

Recognizing teachers' critical role in successful pilots, districts worked in various ways to build buy-in. What one leader called the "optional but compensated" approach worked well early in the pilot phases but created longer-term challenges. For example, three districts relied on extra compensation and stipends to attract teachers to their Bold Idea. In these districts, pilot teams created opportunities for teachers to learn about the Bold Idea. If they chose to participate in the pilot, they received some form of compensation (ranging from stipends and hourly pay for time spent doing additional training and work to significant pay bumps upwards of $10,000). Importantly, these districts did not require mandatory adoption of the Bold Idea by teachers.

While this strategy did build support among small groups of teachers, using a financial incentive to attract teachers to the pilot had its downside: The extra compensation telegraphed the message that the pilot work was fundamentally separate from teachers' existing workload, rather than something that would eventually be widespread and integrated into core teaching responsibilities. As one leader observed, "If you are stipending, that indicates it is extra work—and when the stipend goes away people will stop doing the extra work." When funding for the additional compensation dried up, teachers lost interest in the Bold Idea.

Lessons learned

We saw three districts build teacher buy-in—while side-stepping the danger of the Bold Idea seeming like an extra—by **helping teachers to develop a powerful and personalized "why"** for their participation in the initiative. Because these districts' teachers had developed an understanding of "why" and how the Bold Idea would both improve their own work and students' learning, the addition of modest incentives did not undermine buy-in.

For example, a pilot lead in one district described creating "dream time" during which teachers could imagine their "why"—in this case, how the Bold Idea could help them offload their least favorite tasks. As the pilot lead in this district described it, "[Teachers] complain about the grading, they complain about the lesson planning … and it's like, 'Okay, so how do we use technology [in our Bold Idea] to do that for you? And then, what would your role look like? What could you do with that time?' It's that relationship-building with students. It's extra time sitting one-on-one with the kids that don't get it. It's your time. [And it] looks

different [with the Bold Idea]." This leader went on to describe how the feedback teachers gave during dream time led to more buy-in: "And so as [teachers] can see these features come out, they're like, 'I asked for that.' Which is exciting because our teachers are part of that building process now, and they feel like they've been listened to in order to change and get the things they need for their classrooms."

Another district highlighted how creating multiple entry points for teachers to engage with the Bold Idea helped to build their "why." This district invited their yearlong training cohorts to drop-in design studios and provided them with modest compensation—though, notably, only for time spent engaged in training and design, not for time spent in classroom implementation. They then leveraged the most enthusiastic early adopters to act as "evangelists" for the work by encouraging them to present at their school's staff meetings, bring interested peers to design studios, and even train their own principals on new pedagogies. This approach, dubbed an "intentionally organic design," has built teacher buy-in across the district, even though many teachers did not go through the initial pilot training and have received only minimal financial compensation for piloting. This approach took time, with the pilot team seeding teacher interest early in the design stage and waiting two years for authentic buy-in to "catch on fire and spread."

3. To help teachers change their teaching, districts needed to be very explicit about how the Bold Idea changes instruction and provide teachers with targeted professional development to do so.

While we selected each district based on the extent to which their designs for the Bold Idea reimagined students' learning, when they began their pilots, some districts had not yet built out professional learning for their teachers to support their participation in the Bold Idea. Leaders were, essentially, hoping teachers could figure out the Bold Idea and shift their practice on their own.

Six districts did not have a plan, and this led to fragmented or nonexistent professional learning, with the districts relying instead on bare-bones introductions and letting teachers navigate the Bold Idea on their own. For example, in one system, professional development consisted of only an introductory onboarding system for teachers, followed by occasional check-ins initiated by teachers based on their questions. By the end of our study, two of the districts without a plan had paused their Bold Idea pilots in part due to unclear teacher implementation.

In the districts where the Bold Idea relied heavily on a new technological tool, district leaders operated under the assumption that instruction would shift automatically without outside input. Some leaders imagined that, for example, introducing a new learning management system would push teachers to adopt new instructional practices, like project-based learning. One project lead captured this theory succinctly: "We are trying to think about features we can build into [the LMS] so that transformation is inevitable." However, this theory has not borne out. While such technologies may enable new teaching practices, changes only happened with additional coaching, professional development, and other training that directly addressed teaching.

Lessons learned

To address this challenge, we observed five districts **starting with a strong theory of action that connected their Bold Idea to concrete changes in the classroom or in teachers' practice**. Using these road maps, leaders had a guide for how to support teachers in changing their practice and where to provide professional development for teachers. Having explicit descriptions of how teaching needed to change meant that these districts were able to provide training on how to implement the Bold Idea with consistency and fidelity.

Five districts used a theory of action to help anticipate where support would be needed and then deployed instructional coaches accordingly. One of the districts leveraged state funding for coaches. This support strengthened the district's pilot, and a leader noted that after "equipping our instructional coaches and principals more [to support teachers' development of the key skills they needed], it just became very widespread, very quickly."

Another district revisited their theory of action and saw how much of a departure the Bold Idea was from what teachers were used to. One leader described how their Bold Idea was such a significant departure from their "regular" instructional model that some teachers would need explicit guidance in how to change the sequence and pace of their lessons within the new model. Four of these five theory-of-action districts are scaling out more advanced pilots next year, something they attribute to having a centralized theory of action and aligned support.

4. To build principal ownership, districts involved principals as "innovation leaders" through the design and pilot phases.

The pilot teams in each district recognized the importance of engaging teachers, but not all prioritized principal ownership of the Bold Idea or helped principals lead the work. Principals who weren't explicitly included in the pilot struggled to support and prioritize the initiative among their other responsibilities or within their schools. And these districts missed out on the important information about school-level implementation that principals provided in other districts, such as building teacher buy-in and making school-level design decisions to accommodate the pilot.

In six districts, principals were not actively involved in the Bold Idea's design and instead received directions on how to implement the pilot, such as setting up software and arranging times for teacher participation data meetings. In one case, principals' involvement was limited to just being alerted that the pilot would take place in their school. As one system leader commented, "[Principals] view the work as just one more thing that they have to do versus … the framework for the school." Some districts were concerned about adding to principals' already-heavy workload. As one leader noted, "The principal job is an impossible job, and it is so often the chokehold in transformation because that poor human oversees everything and has only this much capacity to take in new learning or new ideas."

In some cases, districts didn't fully engage principals and failed to communicate why the Bold Idea was important. A pilot team member in one such district described the challenges of explaining the Bold Idea to principals in a way that allowed them to effectively execute plans: "Just hearing it verbally and then having to go implement and execute it, it's tough," he reflected. "We want to make sure that they're communicating it correctly [to their staff] and enabling the right things, and doing it correctly."

Lessons learned

Four districts saw principals as a critical resource in spreading their Bold Idea and building teacher buy-in. We saw leaders in these districts actively **engage principals as "innovation leaders,"** as one pilot lead described them. These districts worked with principals as "innovation leaders" by helping them to understand the Bold Idea and how it fit into their campus goals, giving them support to "own" the work, and enabling them to provide continuous school-level feedback on how the pilot is going.

One district exemplified this "innovation leader" approach. To support expansion to new campuses, pilot leads met with principals to identify how school-specific goals aligned with the initiative. As implementation was underway, central office leadership held frequent meetings with principals and their teams to assist with school-specific action plans. In schools where teacher support was a high need, they paired central office instructional coaches, trained in the Bold Idea's instructional vision, with teachers to take coaching off principals' plates. Finally, they sought ongoing feedback from principals. As one of the principals noted, "[The project team] trusts us. We get a chance to … give direction and give feedback about what we want and how it could be beneficial."

These districts also actively **involved principals during the design phase** instead of presenting them with a fully formed plan to implement. For example, one district's pilot featured a principal-forward model, in which principals took the lead in collecting feedback from teachers, refining the approach based on that feedback, leading communications with teachers, serving as the primary communicators with parents, and collaborating with the Teaching & Learning department to shift the curriculum calendar as needed. One district leader, whose pilot plan was reworked to include principals, reflected,

"This work is not going to continue unless [principals] are leading it."

5. User feedback data allowed districts to fine-tune their Bold Ideas and identify new training key staff needed.

In each of the districts in our study, the innovative nature of the Bold Idea meant there were few predetermined data points that they could use to guide the continuous improvement of their pilots. While all school districts collected usage metrics (e.g. usage of new learning platforms or other tools or teacher participation in professional learning), it was less common to gather data that provided feedback on the Bold Idea itself. Similarly, evaluative data was most often in the form of summative, end-of-year measures, such as improvements on standardized assessments, student attendance, and end-of-year climate surveys, which, while important, had limited utility when seeking to identify the areas of strength and improvement of the pilots.

So, while each district made efforts to collect data to improve and evaluate their initiative, most also lacked either the resources to gather relevant and timely data or the processes or frameworks to make sense of what they were collecting. This lack of early pilot data meant that districts did not know when their initiatives were evolving in practice or if key elements of the design were being neglected. Pilot leads were late to know that teachers and principals found some elements of the original Bold Idea unworkable.

In other districts, they collected so much data that it became overwhelming and confusing. Leaders often described their districts as "data-forward"—meaning they had a strong culture of collecting frequent data—but we observed that they lacked structures to synthesize and communicate it to stakeholders. Pilot leads described two reasons for this disconnect. First, while they are consistently collecting data related to the Bold Idea (and to other initiatives), the data exists in individual spreadsheets that are not connected to a larger data management system. Second, pilot leads described challenges operationalizing qualitative data—they have made a big push to collect more qualitative data through open response surveys from parents, teachers, and students, but lack the capacity to analyze the data and tie it to the Bold Idea or to quantitative data being collected. In addition to the capacity issue, they did not identify key leading indicators and lacked clear implementation measures, such as defining what successful classroom-level implementation should look like. As a result, the data failed to reach the level of actionable evidence because leaders lacked a framework to interpret it effectively, or they collected data points not directly tied to the Bold Idea.

Lessons learned

Despite these challenges, over the course of the year, five districts **developed data strategies that gathered stakeholder and teacher feedback data** to use alongside usage metrics and evaluative data. Together, this allowed pilot teams to use data to continuously improve the Bold Idea itself and strengthen its implementation.

These districts gathered stakeholder and teacher feedback data in multiple ways, including: exit tickets following trainings and surveys of students, teachers, and parents, as well as qualitative data gathered during observations by principals and instructional coaches and during community forums.

Typically, districts used this feedback data to adjust their pilots. For example, one district started an annual parent survey on their Bold Idea and learned that while parents were satisfied with the changes to instructional practices, they were frustrated with a lack of clarity about schedule and transportation changes at pilot schools. As a result, the district became more proactive in their communication with parents. Another district collected data from parent and student surveys and held numerous community forums to learn what parents and community members want from students in the district, using this data to fine-tune their Bold Idea.

Districts used qualitative data similarly; one pilot team gathered qualitative data through observations and from principals and learned that teachers did not fully understand how the Bold Idea affected student learning, prompting

them to refocus mid-year on clearly defining and communicating the importance of the Bold Idea to staff. School districts also used teacher feedback to shape coaching for teachers and principals and identify key training needs.

Other districts systematically collected teacher feedback and found that it was especially critical to tweaking or course correcting the Bold Idea itself. One district working on making substantial changes to instruction heard from principals that teachers were unhappy with the changes. In response, the district solicited formal feedback from teachers to better understand their concerns. From this feedback they learned they needed to slow the content pacing as well as establish more frequent progress monitoring to understand teacher engagement with the shifts to instructional practices.

Districts building their own tech tools found it particularly effective to ask parents, teachers, and other users to provide feedback directly within the platform. They then collaborated with developers to make necessary adjustments. Recognizing the importance of data management, districts took steps to improve their capabilities by hiring additional data analysts to better manage and interpret the collected data.

6. Pilot teams leveraged relationships and used political expertise to anticipate and navigate state policy barriers.

At least four districts leveraged state policies and resources when designing their Bold Ideas but even districts that successfully navigated barriers early on still encountered state-level challenges that threatened to stall their pilots. At least six districts found it challenging to navigate around state-level policy barriers or political contexts even when they did work to anticipate barriers.

Four districts faced barriers because their Bold Idea called for a new way of tracking or reporting student learning progress that detoured from traditional state accountability frameworks. For example, one district launched a Bold Idea that used blended learning technology but ran into challenges scaling it because of a post-pandemic rule about how much remote instruction districts could provide to students. Another district whose students had achieved nationally recognized success for achieving new career-centered learning goals found that advocating the benefits of adding these alternatives to the state accountability system fell on deaf ears. A third district benefited from state support for its mastery-based learning model under one state leader. However, after that leader's departure, they were subject to new restrictive curricular requirements set by the state legislature.

Lessons learned

We observed three districts navigate emergent policy barriers by **building relationships through their participation in state initiatives and summoning the political skill** to negotiate with state leaders to accommodate their Bold Idea or push new recommendations.

Starting prior to the study phase, these pilot leads built mutually reinforcing relationships with state officials by first serving as pilot sites for state-endorsed ideas and projects and then building a reputation for evidence-based success that the state could leverage. In some cases, the pilot leads realized they had some political power because their programs demonstrated early successes that the state wanted to see continue. As one leader put it, "It's in the state's interest for this initiative to be successful." The pilot lead in this district then worked closely with the state to gather extra resources for the pilot.

Two districts whose Bold ideas utilized AI technology found their states had not yet provided guidance on using the new tools. These districts acted early and took advantage of the blank slate environment to push their own recommendations. And while this took additional time and resources, they found they needed to make this investment. In the words of one leader, "We were ahead of the curve … [Because the state had no guidance around AI, we] found ourselves as a system … very vulnerable [due to liability and responsibility for tech-related unknowns] … We have now a full AI use data policy that's … being used as a model across the state."

7. Pilots scrambled to survive leadership turnover.

Any district looking to truly disrupt longstanding practices and policies needs leadership to frame the change and vision, give authority to implementation teams, and keep up momentum. Over the course of the 2023–24 school year, four of the 11 districts lost their superintendent or central office-level champion—notable, considering we selected districts for leadership longevity using multiple measures of superintendent, board, and central office commitment to the Bold Idea.

Districts can and did work around the barriers described in the sections above, but because their Bold Ideas relied on the commitment and stewardship of strong leadership, it was devastating when a superintendent or cabinet lead left or when an idea fell out of favor with the board. As a result of these turnovers, two of the four districts that lost key leaders have put their Bold Idea indefinitely on hold, while the other two are continuing the work—albeit at a slower pace, and with less certainty moving forward.

Lessons learned

Unlike the previous "lessons learned" sections in this data note, we did not see districts clearly and successfully navigate this barrier. Across these four districts, we observed leaders scramble to sustain their Bold Ideas in the wake of leadership loss. The main approach they tried was to gather external sources of support to counterbalance the internal losses. Their rationale was that initiatives aligned to public need have a greater chance of surviving leadership transitions, so they worked to build community support, create parent or student demand, leverage existing partnerships, and even garner media attention in the hopes that these could be balancing forces to keep the work going throughout leadership turnovers.

In one system, this approach was successful. Their Bold Idea was several years into its development when they put the pilot on hold because two champions were abruptly removed from their positions mid-year. However, the pilot had accrued significant parental support and national attention, and this pressure pushed the district to reinstate some of the delayed programming the following year.

In the other districts, developing external support did not guarantee survival. For example, one of these districts, after conducting years of community-based design work and fostering buy-in with an external technical assistance provider, leveraged this partnership to continue its pilot after unexpectedly losing its superintendent and biggest champion. The external support wasn't enough to maintain board support, however, and the district has put its Bold Idea on hold indefinitely.

Conclusion

Following these 11 districts for a year revealed plenty of challenges in piloting their Bold Ideas—even though they had been selected as the most ready to make systemic change. This fact alone suggests several implications. First, being "ready"—that is, having a theory of action that connects a problem to the requisite changes, ample support from top district leaders as well as school-level staff and community members, and plans for both the implementation and sustainability of the pilot—did not inoculate districts from experiencing challenges. But these districts were ready with tried-and-true change management strategies—like building community support, adding staff and coaching and other resources, and building principal capacity—that they could bring to bear on the challenges. These districts were also willing to tweak their initiatives to respond to feedback and new data, and remained nimble enough to address several challenges at a time.

Second, these findings suggest that districts can navigate barriers when they match specific challenges to specific change management strategies. For example, when faced with a teaching corps that didn't fully understand the Bold Idea, these districts found that showing how it solved a problem teachers were experiencing ("building their why") was helpful. Change management guidance typically exists as long lists of to-dos that are disconnected from specific challenges—resulting in overwhelming guidance to pilot leads and others tasked with innovative systemic change. The experiences of our 11 districts begin to show how and when change management strategies can be customized and prioritized to solve specific challenges.

Third, leadership challenges and the corresponding (lack of) sustainability plans was the most difficult challenge for Bold Idea pilots to weather. Districts seeking instructional change need an ambidextrous leader at the helm, but losing such an integral person proved disastrous for several of our pilot districts. This suggests that districts pursuing innovative systemic change should work on leadership succession plans alongside the roll-out of their pilots. Such plans might include who would steward the project next, ways to ensure a broad base of support among constituents, and tracking and codifying ongoing work.

At this point, we can't say what will come of these Bold Ideas in later years, as they scale up from the pilot stage. The findings in this data note are preliminary—but they do illustrate the work required to get through the early challenges to the pursuit of innovative systemic change.