



SCALING UP CHESS IN SCHOOLS

Part 4 – Designing & Managing Your CIS Project

So far we have covered the reasons why the time is right for multi-site CIS, discussed the qualities of a sustainable, large-scale CIS model, and reviewed current real-life examples. Now we consider the most important issue: Which multi-site CIS model is right for you?

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So far we have covered the reasons why the time is right for multi-site CIS, discussed the qualities of a sustainable, large-scale CIS model, and reviewed current real-life examples.

One striking insight that arises from looking at these examples is their apparent disparity. In each there are differences in the roles and leadership of the five communities, the roles and training of teachers, and the tools selected.

What conclusion should we draw from this? More importantly, how does someone considering undertaking a multi-site CIS initiative decide which of these models (if any) to follow?

Drawing upon a couple of decades of experience as both a project manager and an information systems/process designer, I'll offer the following guidance:

Consider your strategic plan and proposal for a multi-site CIS deployment from three perspectives:

1) **Architectural** – This perspective includes these design elements:

- the CIS components,
- the supporting infrastructure,
- the cultural/educational environment, and
- how these all interact.

The CIS architecture is the end state that you want your CIS implementation to achieve. It answers the question: **What** is to be done?

The “CIS components” are the teachers, chess curriculum, lesson plans, supplies, and schedules that make up the CIS program.

“Supporting infrastructure” spans a broad range of enabling resources. It includes the classroom and technical infrastructure available to schools, the organization(s) providing administrative support, infrastructure for teacher training, repositories for lesson plans, and other resource materials. It also may include infrastructure available through chess federations or third-party providers of chess training and tournaments

As a practical example, Broward County chose a single vendor implementation¹ of beginner chess instruction that would be implemented comprehensively across grades 2 and 3 of all their schools. The Alabama CIS architecture with its teacher-driven integrated approach (selected from a set of schools who wanted to be in the program) placed greater demands on teachers but arguably has the potential for tighter integration of chess with the school's core curriculum and goals. Broward County, in taking a top-down approach, selected a CIS architecture that was relatively easy to implement and not too demanding of teachers. As their program evolves they are deepening teacher and parent involvement by partnering with the National Scholastic Chess Foundation to offer chess training targeted to those groups.

Alabama's bottom-up approach asked more of teachers and administrators, but included only those schools whose teachers and principal had enthusiastically volunteered to be part of the pilot. The differences between the Broward County and Alabama approaches were decided early on by the leadership in the education community based upon their assessment of their situation and capabilities.

There are pros and cons to each approach. The key idea is to pick a CIS program design that fits the organization and its educational strategy.

- 2) **Project Management** – This is the process perspective. As a former senior project manager for many years, I managed implementations of major information technology and changes for large public and private sector organizations. Managing a multi-stage, CIS program implementation involving multiple communities is a non-trivial project management challenge. As alluring as the image of multi-site CIS is, the project manager must grasp and be able to convey to others what success requires.

The project should be staffed with an experienced project manager and planned in iterative (and possibly overlapping) phases. For example,

- Project Initiation / Proposal – this is where the work is done to get a commitment to funding and resources necessary to launch a CIS project.²
- Design
- Development
- Training/Testing
- Implementation

This perspective answers these questions:

- How will it be done?

¹ First Move, af4c.org

² A redacted version of the ACIS proposal is available for download at: alabamachess.org/cis/acisproposalredacted.pdf

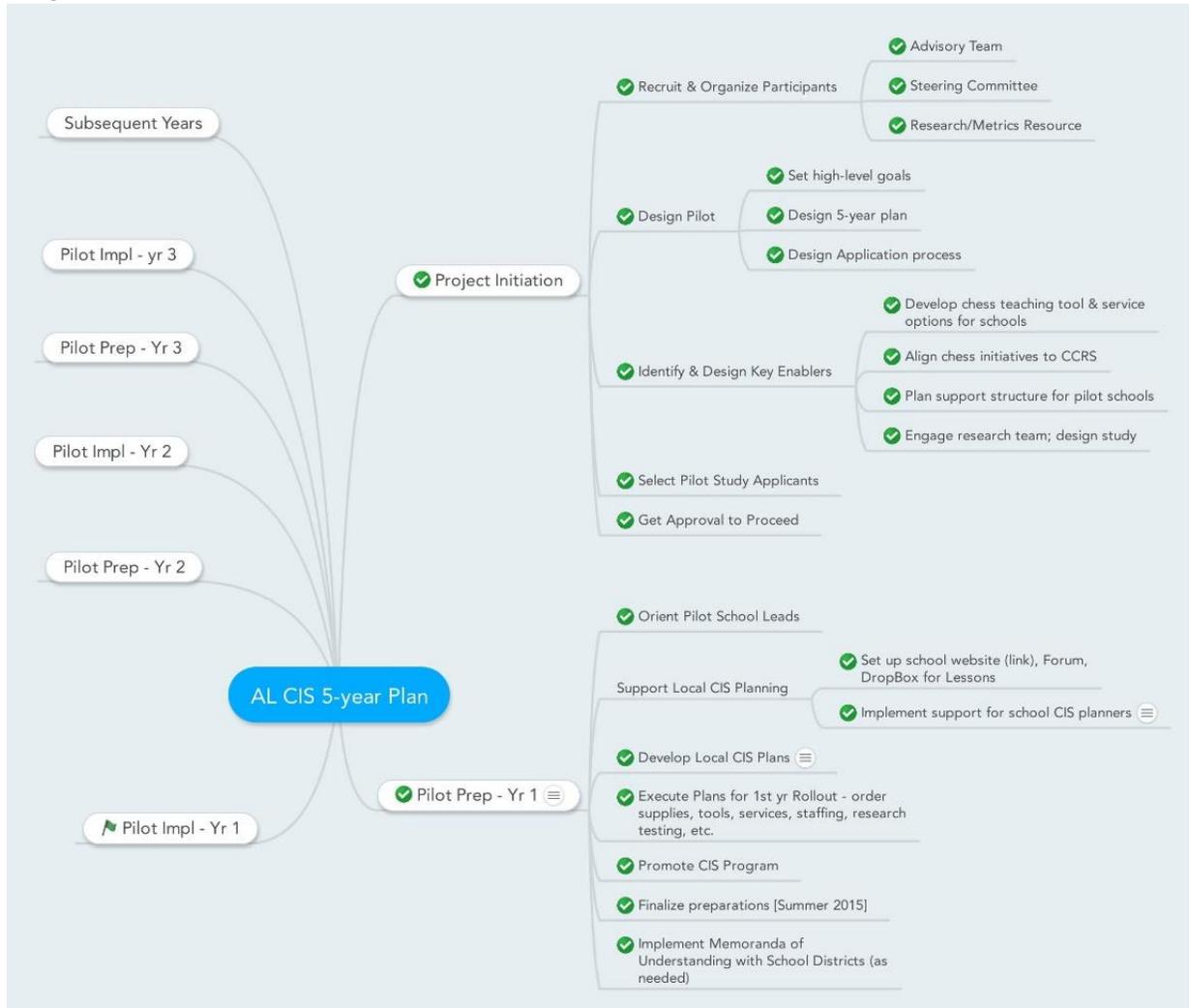
- Who will do the work leading up to implementation?
- How much will it cost?
- When will it be done?
- What management controls are needed? For example:
 - Budgets
 - Issue management, including escalation protocols
 - Risk management.

Diagram 1 shows the high-level structure of a long range plan from the Alabama Chess in Schools Initiative. The project management for that project also included typical project management tools such as project schedules, issue logs, and collaborative spreadsheets for tracking milestone achievement at schools.

- 3) **Social/Cultural/Financial** – Give thorough consideration to roles and significance of the “Five Communities” discussed in the Nash paper. The communities are both stakeholders and suppliers of personnel and financial resources. It answers the question: Who needs to be involved to ensure success?

In the multi-site CIS examples already covered in Parts 2 and 3, we saw distinct differences in the roles and interplay of the five communities. In Armenia the strong chess culture and a supportive national government were critical. In Broward County local government and the county school administration were the key initiating communities. In Madison City a school board member instigated the alignment of the local education and chess communities. In Alabama the state chess federation and Alabama State Department of Education took the lead. Each of these different community alignments, cultures, and financial resources influenced the final CIS design.

Diagram 1



Summary

The teaching of chess to children in the United States has historically been a bottom-up phenomenon. While there has recently been a shift from individual instruction to group instruction at a chess club or school, there have been relatively few successful attempts to institutionalize chess training in a way that is scalable and sustainable in a public school system.

Changes in technology and reforms in education are now making it possible for school districts and states to introduce chess training programs to a broader spectrum of the school population. The combination of technology and evolving chess curricula are making it possible for teachers with little or no chess experience to take on the challenges of both teaching the game in a way that makes it a catalyst for teaching their core subject material.

This Scaling Up Chess in Schools has in four parts:

- offered some multi-site CIS theory,
- surveyed recent international CIS initiatives,
- taken an in-depth look at the Alabama Chess in Schools Initiative,
- noted tactical lessons learned from the ACIS Initiative, and
- presented strategic advice for those contemplating a large-scale CIS implementation.

While differences in the designs of multi-site CIS designs have been noted, there are some common critical success factors:

- Coordination to achieve a workable mix of the five communities (Education, Chess, Civic, Business, Government)
- Design scalability
- Sustainability/resilience of the human resources infrastructure
- Metrics and adaptive learning
- Project management

The ACIS leadership team hopes that our experience, while still in the formative stage, will encourage others in their CIS endeavors.