U.S. Department of Education

Washington, D.C. 20202-5335

APPLICATION FOR GRANTS UNDER THE

FY 2016 TIF Competition 84.374A

CFDA # 84.374A

PR/Award # U374A160041

Gramts.gov Tracking#: GRANT12215655

OMB No. , Expiration Date:

Closing Date: Jul 15, 2016

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This application was generated using the PDF functionality. The PDF functionality automatically numbers the pages in this application. Some pages/sections of this application may contain 2 sets of page numbers, one set created by the applicant and the other set created by e-Application's PDF functionality. Page numbers created by the e-Application PDF functionality will be preceded by the letter e (for example, e1, e2, e3, etc.).

There were problems converting one or more of the attachments. These are: 1236-GEPA 427 Statement MCESA.pdf, 1238-Project Narrative Attachment.pdf, 1235-TIF 5 Abstract MCESA.pdf, 1239-Appendix B - Tif Optional High-Need School Checklist.pdf, 1242-Appendix E - Letters of Support_MOUs.pdf, 1240-Appendix C - Logic Model.pdf, 1243-Appendix f - Other Documents.pdf, 1249-Project Congressional Districts.pdf, 1247-REIL- Extend Project Narrative MCESA.pdf, 1237-Appendix A - Tif Optional Application Requirements Checklist.pdf, 1248-Areas Affected By Project MCESA.pdf, 1244-Appendix G - High Need Documentation.pdf, 1246-Appendix I - Indirect Cost Rate.pdf, 1241-Appendix D -Resumes of Key Personnel.pdf, 1234-TIF 5 Budget Narrative MCESA.pdf, 1245-Appendix H - Charter School Documentation.pdf

Application for Federal Assistance SF-424

* 1. Type of Submission:
- [ ] Preapplication
- [x] Application
- [ ] Changed/Corrected Application

* 2. Type of Application:
- [x] New
- [ ] Continuation
- [ ] Revision

* If Revision, select appropriate letter(s):

* Other (Specify):

* 3. Date Received: 07/15/2016

4. Applicant Identifier:

5a. Federal Entity Identifier:

5b. Federal Award Identifier:

State Use Only:

6. Date Received by State:

7. State Application Identifier:

8. APPLICANT INFORMATION:

* a. Legal Name: Maricopa County Education Service Agency

* b. Employer/Taxpayer Identification Number (EIN/TIN): 866000472

* c. Organizational DUNS: 1838666800000

d. Address:

* Street1: 4041 N Central Ave
Street2: Suite 1200
* City: Phoenix
County/Parish:
* State: AZ: Arizona
Province:
* Country: USA: UNITED STATES
* Zip / Postal Code: 85012-3311

e. Organizational Unit:

Department Name: Maricopa County Ed Svc Agency

Division Name:

f. Name and contact information of person to be contacted on matters involving this application:

Prefix:
* First Name: Curtis
Middle Name: J
* Last Name: Beckstrom
Suffix:

Title: Administrator

Organizational Affiliation:

* Telephone Number:
Fax Number: 602-506-2398

* Email:

Tracking Number:GRANT12215655 Funding Opportunity Number:ED-GRANTS-053116-002 Received Date:Jul 15, 2016 02:30:38 AM EDT

Application for Federal Assistance SF-424

*** 9. Type of Applicant 1: Select Applicant Type:**

B: County Government

Type of Applicant 2: Select Applicant Type:

X: Other (specify)

Type of Applicant 3: Select Applicant Type:

* Other (specify):

Local Education Agency (LEA)

*** 10. Name of Federal Agency:**

U.S. Department of Education

11. Catalog of Federal Domestic Assistance Number:

84.374

CFDA Title:

Teacher Incentive Fund

*** 12. Funding Opportunity Number:**

ED-GRANTS-053116-002

* Title:

Office of Innovation and Improvement (OII): Teacher Incentive Fund (TIF) CFDA Number 84.374A

13. Competition Identification Number:

84-374A2016-2

Title:

14. Areas Affected by Project (Cities, Counties, States, etc.):

Areas Affected By Project MCESA.pdf

Add Attachment | Delete Attachment | View Attachment

*** 15. Descriptive Title of Applicant's Project:**

Rewarding Excellence in Instruction and Leadership-Extend

Attach supporting documents as specified in agency instructions.

Add Attachments | Delete Attachments | View Attachments

Tracking Number:GRANT12215655 Funding Opportunity Number:ED-GRANTS-053116-002 Received Date:Jul 15, 2016 02:30:38 AM EDT

Application for Federal Assistance SF-424

16. Congressional Districts Of:

* a. Applicant AZ-004 * b. Program/Project AZ-003

Attach an additional list of Program/Project Congressional Districts if needed.

Project Congressional Districts.pdf | Add Attachment | Delete Attachment | View Attachment

17. Proposed Project:

* a. Start Date: 10/01/2016 * b. End Date: 09/30/2021

18. Estimated Funding ($):

* a. Federal	4,488,326.00
* b. Applicant	0.00
* c. State	0.00
* d. Local	0.00
* e. Other	0.00
* f. Program Income	0.00
* g. TOTAL	4,488,326.00

*** 19. Is Application Subject to Review By State Under Executive Order 12372 Process?**

☐ a. This application was made available to the State under the Executive Order 12372 Process for review on .

☒ b. Program is subject to E.O. 12372 but has not been selected by the State for review.

☐ c. Program is not covered by E.O. 12372.

*** 20. Is the Applicant Delinquent On Any Federal Debt? (If "Yes," provide explanation in attachment.)**

☐ Yes ☒ No

If "Yes", provide explanation and attach

Add Attachment | Delete Attachment | View Attachment

21. *By signing this application, I certify (1) to the statements contained in the list of certifications and (2) that the statements herein are true, complete and accurate to the best of my knowledge. I also provide the required assurances** and agree to comply with any resulting terms if I accept an award. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 218, Section 1001)**

☒ ** I AGREE

** The list of certifications and assurances, or an internet site where you may obtain this list, is contained in the announcement or agency specific instructions.

Authorized Representative:

Prefix: * First Name: Curtis

Middle Name: J

* Last Name: Beckstrom

Suffix:

* Title: Administrator

* Telephone Number: Fax Number: 602-506-2398

* Email:

* Signature of Authorized Representative: Kristine Morris * Date Signed: 07/15/2016

Tracking Number:GRANT12215655 Funding Opportunity Number:ED-GRANTS-053116-002 Received Date:Jul 15, 2016 02:30:38 AM EDT

Areas Affected By Project

The Phoenix metropolitan area, a fast growing city of approximately four million people and the city limits of Kingman, Arizona, will be affected by the project. The Phoenix metropolitan area is located within the state of Arizona and Maricopa County. The city of Kingman has a population of just over 28,000 people and is located within the state of Arizona and Mohave County. Participating LEAs across Maricopa County and the Kingman Unified School District will be impacted by the Rewarding Excellence in Instruction and Leadership-Extend (REIL-Extend) program by encouraging professional growth for all educators and by providing opportunities for participants to reach their highest potential.

Project Congressional Districts –

AZ-001

AZ-003

AZ-004

AZ-005

AZ-006

AZ-007

OMB Number: 4040-0007
Expiration Date: 01/31/2019

ASSURANCES - NON-CONSTRUCTION PROGRAMS

Public reporting burden for this collection of information is estimated to average 15 minutes per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Office of Management and Budget, Paperwork Reduction Project (0348-0040), Washington, DC 20503.

PLEASE DO NOT RETURN YOUR COMPLETED FORM TO THE OFFICE OF MANAGEMENT AND BUDGET. SEND IT TO THE ADDRESS PROVIDED BY THE SPONSORING AGENCY.

NOTE: Certain of these assurances may not be applicable to your project or program. If you have questions, please contact the awarding agency. Further, certain Federal awarding agencies may require applicants to certify to additional assurances. If such is the case, you will be notified.

As the duly authorized representative of the applicant, I certify that the applicant:

1. Has the legal authority to apply for Federal assistance and the institutional, managerial and financial capability (including funds sufficient to pay the non-Federal share of project cost) to ensure proper planning, management and completion of the project described in this application.

2. Will give the awarding agency, the Comptroller General of the United States and, if appropriate, the State, through any authorized representative, access to and the right to examine all records, books, papers, or documents related to the award; and will establish a proper accounting system in accordance with generally accepted accounting standards or agency directives.

3. Will establish safeguards to prohibit employees from using their positions for a purpose that constitutes or presents the appearance of personal or organizational conflict of interest, or personal gain.

4. Will initiate and complete the work within the applicable time frame after receipt of approval of the awarding agency.

5. Will comply with the Intergovernmental Personnel Act of 1970 (42 U.S.C. §§4728-4763) relating to prescribed standards for merit systems for programs funded under one of the 19 statutes or regulations specified in Appendix A of OPM's Standards for a Merit System of Personnel Administration (5 C.F.R. 900, Subpart F).

6. Will comply with all Federal statutes relating to nondiscrimination. These include but are not limited to: (a) Title VI of the Civil Rights Act of 1964 (P.L. 88-352) which prohibits discrimination on the basis of race, color or national origin; (b) Title IX of the Education Amendments of 1972, as amended (20 U.S.C.§§1681-1683, and 1685-1686), which prohibits discrimination on the basis of sex; (c) Section 504 of the Rehabilitation Act of 1973, as amended (29 U.S.C. §794), which prohibits discrimination on the basis of handicaps; (d) the Age Discrimination Act of 1975, as amended (42 U. S.C. §§6101-6107), which prohibits discrimination on the basis of age; (e) the Drug Abuse Office and Treatment Act of 1972 (P.L. 92-255), as amended, relating to nondiscrimination on the basis of drug abuse; (f) the Comprehensive Alcohol Abuse and Alcoholism Prevention, Treatment and Rehabilitation Act of 1970 (P.L. 91-616), as amended, relating to nondiscrimination on the basis of alcohol abuse or alcoholism; (g) §§523 and 527 of the Public Health Service Act of 1912 (42 U.S.C. §§290 dd-3 and 290 ee- 3), as amended, relating to confidentiality of alcohol and drug abuse patient records; (h) Title VIII of the Civil Rights Act of 1968 (42 U.S.C. §§3601 et seq.), as amended, relating to nondiscrimination in the sale, rental or financing of housing; (i) any other nondiscrimination provisions in the specific statute(s) under which application for Federal assistance is being made; and, (j) the requirements of any other nondiscrimination statute(s) which may apply to the application.

7. Will comply, or has already complied, with the requirements of Titles II and III of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 (P.L. 91-646) which provide for fair and equitable treatment of persons displaced or whose property is acquired as a result of Federal or federally-assisted programs. These requirements apply to all interests in real property acquired for project purposes regardless of Federal participation in purchases.

8. Will comply, as applicable, with provisions of the Hatch Act (5 U.S.C. §§1501-1508 and 7324-7328) which limit the political activities of employees whose principal employment activities are funded in whole or in part with Federal funds.

9. Will comply, as applicable, with the provisions of the Davis-Bacon Act (40 U.S.C. §§276a to 276a-7), the Copeland Act (40 U.S.C. §276c and 18 U.S.C. §874), and the Contract Work Hours and Safety Standards Act (40 U.S.C. §§327-333), regarding labor standards for federally-assisted construction subagreements.

10. Will comply, if applicable, with flood insurance purchase requirements of Section 102(a) of the Flood Disaster Protection Act of 1973 (P.L. 93-234) which requires recipients in a special flood hazard area to participate in the program and to purchase flood insurance if the total cost of insurable construction and acquisition is $10,000 or more.

11. Will comply with environmental standards which may be prescribed pursuant to the following: (a) institution of environmental quality control measures under the National Environmental Policy Act of 1969 (P.L. 91-190) and Executive Order (EO) 11514; (b) notification of violating facilities pursuant to EO 11738; (c) protection of wetlands pursuant to EO 11990; (d) evaluation of flood hazards in floodplains in accordance with EO 11988; (e) assurance of project consistency with the approved State management program developed under the Coastal Zone Management Act of 1972 (16 U.S.C. §§1451 et seq.); (f) conformity of Federal actions to State (Clean Air) Implementation Plans under Section 176(c) of the Clean Air Act of 1955, as amended (42 U.S.C. §§7401 et seq.); (g) protection of underground sources of drinking water under the Safe Drinking Water Act of 1974, as amended (P.L. 93-523); and, (h) protection of endangered species under the Endangered Species Act of 1973, as amended (P.L. 93-205).

12. Will comply with the Wild and Scenic Rivers Act of 1968 (16 U.S.C. §§1271 et seq.) related to protecting components or potential components of the national wild and scenic rivers system.

13. Will assist the awarding agency in assuring compliance with Section 106 of the National Historic Preservation Act of 1966, as amended (16 U.S.C. §470), EO 11593 (identification and protection of historic properties), and the Archaeological and Historic Preservation Act of 1974 (16 U.S.C. §§469a-1 et seq.).

14. Will comply with P.L. 93-348 regarding the protection of human subjects involved in research, development, and related activities supported by this award of assistance.

15. Will comply with the Laboratory Animal Welfare Act of 1966 (P.L. 89-544, as amended, 7 U.S.C. §§2131 et seq.) pertaining to the care, handling, and treatment of warm blooded animals held for research, teaching, or other activities supported by this award of assistance.

16. Will comply with the Lead-Based Paint Poisoning Prevention Act (42 U.S.C. §§4801 et seq.) which prohibits the use of lead-based paint in construction or rehabilitation of residence structures.

17. Will cause to be performed the required financial and compliance audits in accordance with the Single Audit Act Amendments of 1996 and OMB Circular No. A-133, "Audits of States, Local Governments, and Non-Profit Organizations."

18. Will comply with all applicable requirements of all other Federal laws, executive orders, regulations, and policies governing this program.

19. Will comply with the requirements of Section 106(g) of the Trafficking Victims Protection Act (TVPA) of 2000, as amended (22 U.S.C. 7104) which prohibits grant award recipients or a sub-recipient from (1) Engaging in severe forms of trafficking in persons during the period of time that the award is in effect (2) Procuring a commercial sex act during the period of time that the award is in effect or (3) Using forced labor in the performance of the award or subawards under the award.

SIGNATURE OF AUTHORIZED CERTIFYING OFFICIAL	TITLE
Kristine Morris	Administrator
APPLICANT ORGANIZATION	**DATE SUBMITTED**
Maricopa County Education Service Agency	07/15/2016

Standard Form 424B (Rev. 7-97) Back

Tracking Number:GRANT12215655 Funding Opportunity Number:ED-GRANTS-053116-002 Received Date:Jul 15, 2016 02:30:38 AM EDT

DISCLOSURE OF LOBBYING ACTIVITIES

Complete this form to disclose lobbying activities pursuant to 31 U.S.C.1352

Approved by OMB
0348-0046

1. * Type of Federal Action:
- [ ] a. contract
- [x] b. grant
- [ ] c. cooperative agreement
- [ ] d. loan
- [ ] e. loan guarantee
- [ ] f. loan insurance

2. * Status of Federal Action:
- [ ] a. bid/offer/application
- [x] b. initial award
- [ ] c. post-award

3. * Report Type:
- [x] a. initial filing
- [ ] b. material change

4. Name and Address of Reporting Entity:

[x] Prime [ ] SubAwardee

** Name* Maricopa County Education Service Agency

** Street 1* 4041 N Central Ave *Street 2* Suite 1200

** City* Phoenix *State* AZ: Arizona *Zip* 85012

Congressional District, if known:

5. If Reporting Entity in No.4 is Subawardee, Enter Name and Address of Prime:

6. * Federal Department/Agency:
Education

7. * Federal Program Name/Description:
Teacher Incentive Fund

CFDA Number, *if applicable:* 84.374

8. Federal Action Number, *if known:*

9. Award Amount, *if known:*
$

10. a. Name and Address of Lobbying Registrant:

Prefix ** First Name* N/A *Middle Name*

** Last Name* N/A *Suffix*

** Street 1* *Street 2*

** City* *State* *Zip*

b. Individual Performing Services (including address if different from No. 10a)

Prefix ** First Name* N/A *Middle Name*

** Last Name* N/A *Suffix*

** Street 1* *Street 2*

** City* *State* *Zip*

11. Information requested through this form is authorized by title 31 U.S.C. section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the tier above when the transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. 1352. This information will be reported to the Congress semi-annually and will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than $10,000 and not more than $100,000 for each such failure.

*** Signature:** Kristine Morris

***Name:** *Prefix* ** First Name* Curtis *Middle Name* J

** Last Name* Beckstrom *Suffix*

Title: Administrator **Telephone No.:** **Date:** 07/15/2016

Federal Use Only:

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Standard Form - LLL (Rev. 7-97)

Tracking Number:GRANT12215655 Funding Opportunity Number:ED-GRANTS-053116-002 Received Date:Jul 15, 2016 02:30:38 AM EDT

NOTICE TO ALL APPLICANTS

The purpose of this enclosure is to inform you about a new provision in the Department of Education's General Education Provisions Act (GEPA) that applies to applicants for new grant awards under Department programs. This provision is Section 427 of GEPA, enacted as part of the Improving America's Schools Act of 1994 (Public Law (P.L.) 103-382).

To Whom Does This Provision Apply?

Section 427 of GEPA affects applicants for new grant awards under this program. **ALL APPLICANTS FOR NEW AWARDS MUST INCLUDE INFORMATION IN THEIR APPLICATIONS TO ADDRESS THIS NEW PROVISION IN ORDER TO RECEIVE FUNDING UNDER THIS PROGRAM.**

(If this program is a State-formula grant program, a State needs to provide this description only for projects or activities that it carries out with funds reserved for State-level uses. In addition, local school districts or other eligible applicants that apply to the State for funding need to provide this description in their applications to the State for funding. The State would be responsible for ensuring that the school district or other local entity has submitted a sufficient section 427 statement as described below.)

What Does This Provision Require?

Section 427 requires each applicant for funds (other than an individual person) to include in its application a description of the steps the applicant proposes to take to ensure equitable access to, and participation in, its Federally-assisted program for students, teachers, and other program beneficiaries with special needs. This provision allows applicants discretion in developing the required description. The statute highlights six types of barriers that can impede equitable access or participation: gender, race, national origin, color, disability, or age. Based on local circumstances, you should determine whether these or other barriers may prevent your students, teachers, etc. from such access or participation in, the Federally-funded project or activity. The description in your application of steps to be taken to overcome these barriers need not be lengthy; you may provide a clear and succinct description of how you plan to address those barriers that are applicable to your circumstances. In addition, the information may be provided in a single narrative, or, if appropriate, may be discussed in connection with related topics in the application.

Section 427 is not intended to duplicate the requirements of civil rights statutes, but rather to ensure that, in designing their projects, applicants for Federal funds address equity concerns that may affect the ability of certain potential beneficiaries to fully participate in the project and to achieve to high standards. Consistent with program requirements and its approved application, an applicant may use the Federal funds awarded to it to eliminate barriers it identifies.

What are Examples of How an Applicant Might Satisfy the Requirement of This Provision?

The following examples may help illustrate how an applicant may comply with Section 427.

(1) An applicant that proposes to carry out an adult literacy project serving, among others, adults with limited English proficiency, might describe in its application how it intends to distribute a brochure about the proposed project to such potential participants in their native language.

(2) An applicant that proposes to develop instructional materials for classroom use might describe how it will make the materials available on audio tape or in braille for students who are blind.

(3) An applicant that proposes to carry out a model science program for secondary students and is concerned that girls may be less likely than boys to enroll in the course, might indicate how it intends to conduct "outreach" efforts to girls, to encourage their enrollment.

(4) An applicant that proposes a project to increase school safety might describe the special efforts it will take to address concern of lesbian, gay, bisexual, and transgender students, and efforts to reach out to and involve the families of LGBT students.

We recognize that many applicants may already be implementing effective steps to ensure equity of access and participation in their grant programs, and we appreciate your cooperation in responding to the requirements of this provision.

Estimated Burden Statement for GEPA Requirements

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless such collection displays a valid OMB control number. Public reporting burden for this collection of information is estimated to average 1.5 hours per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. The obligation to respond to this collection is required to obtain or retain benefit (Public Law 103-382). Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the U.S. Department of Education, 400 Maryland Ave., SW, Washington, DC 20210-4537 or email ICDocketMgr@ed.gov and reference the OMB Control Number 1894-0005.

Optional - You may attach 1 file to this page.

GEPA 427 Statement MCESA.pdf | Add Attachment | Delete Attachment | View Attachment

Section 427 of GEPA: Statement of Support

The ***Maricopa County Education Service Agency*** is committed to reducing barriers and connecting historically underserved and high-need areas with the services, resources, and tools they need to continuously improve their districts. Representing such a large and diverse county, with rural, urban, and suburban districts, we recognize the various challenges that each student and teacher can face in pursuit of improved academic achievement. We feel honored to be able to provide access for the Maricopa County educational community to programs and services without bias due to gender, race, national origin, color, disability, or age. Our ***Rewarding Excellence in Instruction and Leadership - Extend (REIL-Extend)*** program will work together with partner districts to eliminate barriers and create pathways that remove obstacles to taking full advantage of the program's potential. Our team understands how important it is to incorporate broadly reaching techniques and technologies that allow participants in distant districts to be fully involved. Many of the activities will be in multiple formats, including some that are accessible via the internet, or through other online-supported mechanisms or applications.

The ***Maricopa County Education Service Agency*** will invite candidates from all partner districts, without bias due to gender, race, national origin, color, disability, or age. Partner districts will be offered any and all available accommodations necessary for individuals in need of special services for full participation in the ***REIL-Extend*** program. The ***Maricopa County Education Service Agency*** fosters and encourages professional growth for all educators, providing opportunities for participants to reach their highest potential. The team will work together with each individual to determine the most appropriate methods to overcome any perceived or actual obstacles in reaching the goal of improving compensation systems to best reward student academic achievement, progress, and growth.

CERTIFICATION REGARDING LOBBYING

Certification for Contracts, Grants, Loans, and Cooperative Agreements

The undersigned certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than $10,000 and not more than $100,000 for each such failure.

Statement for Loan Guarantees and Loan Insurance

The undersigned states, to the best of his or her knowledge and belief, that:

If any funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this commitment providing for the United States to insure or guarantee a loan, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions. Submission of this statement is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required statement shall be subject to a civil penalty of not less than $10,000 and not more than $100,000 for each such failure.

* APPLICANT'S ORGANIZATION

Maricopa County Education Service Agency

* PRINTED NAME AND TITLE OF AUTHORIZED REPRESENTATIVE

Prefix: * First Name: Curtis Middle Name: J

* Last Name: Beckstrom Suffix:

* Title: Administrator

* SIGNATURE: Kristine Morris * DATE: 07/15/2016

Tracking Number:GRANT12215655 Funding Opportunity Number:ED-GRANTS-053116-002 Received Date:Jul 15, 2016 02:30:38 AM EDT

Abstract

The abstract narrative must not exceed one page and should use language that will be understood by a range of audiences. For all projects, include the project title (if applicable), goals, expected outcomes and contributions for research, policy, practice, etc. Include population to be served, as appropriate. For research applications, also include the following:

- Theoretical and conceptual background of the study (i.e., prior research that this investigation builds upon and that provides a compelling rationale for this study)
- Research issues, hypotheses and questions being addressed
- Study design including a brief description of the sample including sample size, methods, principals dependent, independent, and control variables, and the approach to data analysis.

[Note: For a non-electronic submission, include the name and address of your organization and the name, phone number and e-mail address of the contact person for this project.]

You may now Close the Form

You have attached 1 file to this page, no more files may be added. To add a different file, you must first delete the existing file.

* Attachment: TIF 5 Abstract MCESA.pdf | Add Attachment | Delete Attachment | View Attachment

Tracking Number:GRANT12215655 Funding Opportunity Number:ED-GRANTS-053116-002 Received Date:Jul 15, 2016 02:30:38 AM EDT

Abstract

Organization Name: Maricopa County Education Service Agency (MCESA)		Organization Address: 4041 North Central Avenue, Suite 1200 Phoenix, AZ 85012
Project Contact: CJ Beckstrom	Project Phone Number: [redacted]	Project Email: [redacted]
TIF General Competition CFDA Number 84.374A	**Competitive Preference: Priority 2**	**Group Application with 2 or more LEAs**

Rewarding Excellence in Instruction and Leadership: REIL Extend, an Alliance of seven (7) unique LEAs, will implement Human Capital Management Systems (HCMS) that retain talent, accelerate equity, expand leadership, and reward excellence for effective educators across forty-four (44) high-need schools. REIL-Extend will: (1) extend the reach of our best teachers and leaders to ensure high-quality instruction for all learners; (2) extend the reach of a collaborative partnership to assist high-need LEAs in bolstering their Human Capital Management Systems; and (3) extend infrastructure developments to expand the capacity of LEAs to utilize educator evaluation data to implement leading-edge technologies and practices that result in high-quality workforce decision-making and first class support systems for educators.

Project Objectives & Activities Summary Statement

The project objectives align to (1) the implementation of high-quality, LEA-wide Human Capital Management Systems focused on attracting, placing, retaining, and sustaining effective educators by expanding leadership and cultivating an engaged workforce; and (2) redesigning high-need schools to extend the reach of excellent educators, thereby increasing equitable access to effective instruction for all students.

Applicant Classification and Eligibility

Group Applicant Name	Eligibility	Number of	Number of High
Maricopa County Education Service Agency (MCESA)	LEA	Lead & Intermediary Unit	Lead & Intermediary Unit
Incito Charter School	LEA	1	1
Kingman Unified School District	LEA	12	12
Maricopa County Regional School District	LEA	7	7
Mobile Elementary School District	LEA	1	1
Nadaburg Unified School District	LEA	2	2
Roosevelt Elementary School District	LEA	19	19
Wilson School District	LEA	2	2
Public Impact	Non-profit Organization		

Project Narrative File(s)

*** Mandatory Project Narrative File Filename:** REIL- Extend Project Narrative MCESA.pdf

Add Mandatory Project Narrative File | Delete Mandatory Project Narrative File | View Mandatory Project Narrative File

To add more Project Narrative File attachments, please use the attachment buttons below.

Add Optional Project Narrative File | Delete Optional Project Narrative File | View Optional Project Narrative File

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INTRODUCTION

In October 2010 and 2012, the Maricopa County Education Service Agency (MCESA), was awarded *Teacher Incentive Fund* Grants to implement *Rewarding Excellence in Instruction and Leadership* (REIL) in multiple Maricopa County local education agencies. With TIF5, MCESA proposes to leverage the experience gained from the REIL program to move forward with *REIL-Extend*, which is intently focused on: (1) *extending* the reach of our best teachers and leaders to ensure high-quality instruction for all learners; (2) *extending the reach of a collaborative partnership* to assist high-need LEAs in bolstering their Human Capital Management Systems; and (3) *extending* infrastructure developments to expand the capacity of LEAs to utilize educator evaluation data to implement leading-edge technologies and practices that result in high-quality workforce decision-making and first class support systems for educators.

The TIF5 partner LEAs represent a diverse group of rural, urban, and special population LEAs that range in size from Mobile Elementary School District with 26 students to Roosevelt Elementary School District with 9,614 students (see Table 1). This group also includes a special population LEA, Maricopa County Regional School District that serves high-need or disengaged youth with a history of justice involvement.

Table 1: TIF5 LEAs

REIL-*Extend* LEAs				
District Name	**# of School**	**District**	**# of**	**# of**
Incito Schools	2	254	14	1
Kingman Unified School District	20	6,956	412	12
Maricopa County Regional School District	2	3,511	45	7
Mobile Elementary School District	1	26	2	1
Nadaburg Unified School District	3	842	46	2
Roosevelt Elementary School District	29	9,614	531	19
Wilson School District	4	1,245	70	2
Total	**61**	**22,448**	**1,120**	**44**

AN LEA-WIDE HUMAN CAPITAL MANAGEMENT SYSTEM (HCMS) WITH EDUCATOR EVALUATION & SUPPORT SYSTEMS AT THE CENTER
(Absolute Priority 1)

→ *A description of the LEA-wide HCMS, as it currently exists and with any modifications proposed for implementation during the project period of the grant.*

This section also addresses components of:

- **Selection Criteria B.2** *The extent to which the services to be provided involve the collaboration of appropriate partners for maximizing effectiveness of project services.*

"If they are to be strategic, HCM practices must align with a district's education improvement strategy and its view of effective instructional practice…and goals for student achievement."
-Allan Odden

OUR PROPOSAL:

① Implement a common vision of instructional improvement within a high-quality HCMS.

② Extend the reach of our best educators to ensure high-quality instruction for all learners.

③ Extend existing infrastructure to expand the capacity of LEAs to utilize educator evaluation. data to implement leading-edge technologies and practices that result in high-quality workforce decision-making and first class support systems for educators.

WORK WE WILL EXTEND:

① Observation instruments, assessments, student growth measures, annual effectiveness.

② HCMS strategies.

③ Supporting legislation.

④ Use of Data Management System (RDSS) to support educator workforce decision-making.

1.1 Absolute Priority:
How the HCMS is or will be aligned with the LEA's vision of instructional improvement.

This section also addresses components of:

- **Selection Criteria B.1** *The extent to which the proposed project is part of a comprehensive effort to improve teaching and learning and support rigorous academic standards for students.*

Three key components communicate how the HCMS aligns to the common vision of instructional improvement: (1) implementation of the performance-based educator evaluation system communicates key competencies and behaviors of effective teaching and leading that produce high levels of student achievement; (2) implementation of the educator support system

demonstrates how desired competencies and behaviors can be acquired or elevated; and (3) integration of the performance-based compensation (PBC) system.

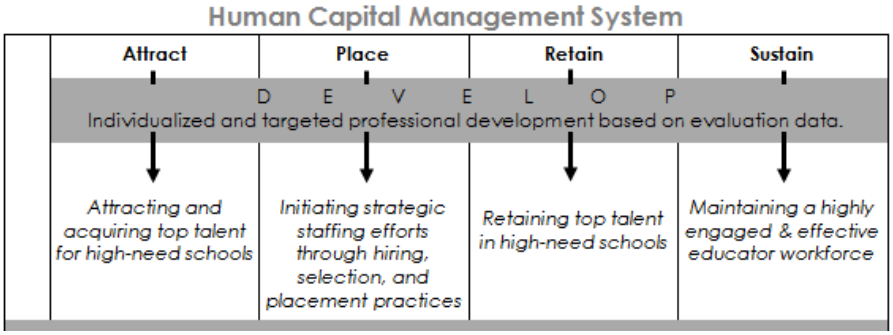
(1) Performance-Based Educator Evaluation System: *REIL-Extend* will utilize an inter-connected set of cross-LEA teacher and leader observation tools (Project Narrative Attachment, p. 3), as well as common assessments to inform student academic progress for all subject areas. These will inform the calculation of the REIL score, an annual overall effectiveness rating (more in section B.1) that serves as the foundation for HCMS decision-making (Absolute Priority section 1.2 for additional information). →An example of HCMS alignment is that observation scores will be reviewed on an ongoing basis and an intervention plan will support teachers who scored low on any of the elements labeled as "early warning indicators" (e.g., Critical Thinking element in the Learner Engagement rubric).

(2) Educator Support System: All educators will receive individual Educator Goal Plans (EGPs) based on the results of educator evaluation results. This is one of the most powerful aspects of HCMS alignment to the common vision. Additional support is described in Section C. Educators will support "on-demand" learning opportunities through educator access to the Learning Management System (LMS), which will connect resources, courses, and videos directly to the educator's observation data results. ◆In Spotlight Schools, educators will join teams led by Multi-Classroom Leaders (MCL) and will have access to daily observation and feedback, co-teaching, co-planning, and other on-the-job learning. ◆The *Learning, Leading, Coaching, and Evaluating Series*, supports educator learning of the elements in the observation rubrics and will inform the LEA-level PD plans. → An example of HCMS alignment is that job-embedded PD opportunities are directly aligned to educator evaluation data, as opposed to LEAs engaging in "PD potpourri."

(3) **Performance-Based Compensation:** LEAs will be utilizing new ways to pay, engaging in strategic compensation plans that reward educator effectiveness based on the REIL score. In addition, Arizona revised statute 15-977 requires that a portion of the funding administered through Arizona's pay-for-performance initiative (Prop 301), be aligned to the educator's overall effectiveness rating (i.e., REIL Score). → An example of HCMS alignment is that LEAs reward educators financially for attaining the performance competencies aligned to the common vision.

Additional Information: Several other examples illustrate the HCMS alignment to the common vision, including the Opportunity Culture initiative (section 1.3), which will be implemented to hire, select, and place highly effective educators in leadership roles. To support understanding of the over-arching HCMS (defined as a comprehensive and cohesive set of practices/strategies used to guide educator workforce decisions), REIL-Extend is organized to *attract, place, retain, and sustain* (Figure 1) effective educators with the use of educator evaluation data. Targeted PD is woven through into these four key areas as shown with the word DEVELOP (Figure 1). Project Narrative Attachment (p. 89) outlines key strategies in each of the four columns.

Figure 1: HCMS Table Header



1.2 Absolute Priority: How the LEA uses or will use the information generated by the Evaluation and Support System it describes in its application to inform key human capital decisions…

REIL-Extend will use educator evaluation results (i.e., observation scores, student growth results, overall effectiveness ratings, and other measures of professional practice) to inform HCMS decisions aligned to the key strategy groupings (attract, place, retain, and sustain).

Recruitment: Results from the evaluation of current employees will be analyzed to generate *sourcing* strategies, supporting recruitment efforts of strong candidates. In addition, these educator evaluation data will help identify gaps to ensure staffing efforts are strategic and support the resulting placement process.

Hiring, Selection, & Placement: The REIL Score and aligned performance classification (ineffective, developing, effective, highly effective) will be utilized as part of the multiple data point hiring process. LEAs will request performance classifications from the prior employer for candidates seeking teaching or leading positions. Performance classifications will also be used to strategically place educators to ensure that students have equitable access to effective instruction and leadership both within and across schools

Promotion: Spotlight Schools will use the performance classifications to determine candidacy to "extend their reach" via the Spotlight Schools Teacher Leader roles implemented through the *OC Initiative.* For example, the REIL Score would be a factor in determining candidacy for the Multi-Classroom Teacher role.

Performance-Based Compensation: LEAs will provide differential pay for educators based on effectiveness (REIL Score). This will occur via retention stipends, base pay salary increases, and salary enhancement for teachers and principals who extend their reach through advanced roles.

Professional Development Planning & Delivery: All educators will have EGPs differentiated based on evaluation results. Those educators who fall in the *ineffective* range will have support through a performance improvement plan, aligned to educator needs, which will determine dismissal, probationary, or continuing status. The *Learning, Coaching, Leading, and Evaluating Series* (described in Section C) are all aligned to the elements in the observation tools, ensuring differentiated support for each educator group.

Management of Retention & Dismissal Decisions: LEAs will implement an expectations and experience-based decision-making model to inform retention and dismissal decisions, in alignment with state statute and the state's four performance classifications, which are derived from educator's evaluation results. An example of this is shown in Table 2.

Table 2: Sample Expectations and Experience Decision-Making Model

Experience	Ineffective	Developing	Effective	Highly Effective
1 year	Retain if improving	Retain if improving	Retain & reward	Retain & reward
2 years	Dismiss	Retain if improving	Retain & reward	Retain & reward
3 years	Dismissal or non-renewal	Extend non-continuing status	Retain & reward	Retain & reward
4 years	Dismissal or non-renewal	Continue probationary status until effective	Retain & reward	Retain & reward
5+ years	Dismissal or non-renewal	Continue probationary status until effective	Retain & reward	Retain & reward

Use of Data to Inform HCMS Decisions (Weight of *REIL Score*)

Table 3 lists HCMS decisions, their alignment to the type of HCMS strategy, along with the significance, or weight, that the REIL Score will play in each HCMS decision. For some decisions, the REIL Score will be a non-negotiable part of the decision-making process. These instances are indicated in the table by the designation of *full* weight. For example, the REIL Score has full weight on the decisions about effective educators receiving PBC, and whether they are placed in specified positions. Other decisions will be made in part on the REIL Score. For example, when considering the equitable distribution of teachers across an LEA, leadership will have to take many factors into account (e.g., highly qualified status, teacher and student demographics, school leadership). In addition, because of state statute, some flexibility will be needed for specific decisions (e.g., reduction-in-force policies).

Table 3: HCMS Decisions Aligned to Results of Educator Evaluation (*REIL Score*)

Strategy Key→ A = Attract | **P** = Place | **R** = Retain | **S** = Sustain					**Weight of REIL Score on HCMS Decision***	
HCMS Decision	**A**	**P**	**R**	**S**	**Partial**	**Full**
Teacher Evaluation & Support						
Placement and base pay progression on educator salary structure.	√			√		√
Salary enhancement for reach extension positions.	√		√	√		√
Placement of teacher in Spotlight School.		√				√
Placement of teacher in career pathway position.		√				√
Issuance of three-year contract to highly effective teacher.	√		√	√		√
Request educator evaluation and performance classification when hiring outside of the LEA.	√	√	√	√	√	
Equitable distribution of teachers.		√			√	
Assignment of goal/action plan (educator goal plan).	√		√	√		√
Design / selection of professional development programs.	√		√	√	√	
Assignment of students to teachers.				√	√	
Employment retention cannot be based solely on tenure or seniority.			√	√	√	
Non-transfer of ineffective teacher to another school.		√			√**	
Assignment of a 4th year teacher with an ineffective performance classification a probationary contract as opposed to a "continuing" contract.			√		√	
Performance improvement plan for teachers with a performance classification of *ineffective*.			√			√
Dismissal policies for teachers with a performance classification of *ineffective* after using the intervention option.			√			√
Dismissal policies for teachers with a performance classification of *ineffective* who are not provided an intervention option (which includes the initiation of a notice of inadequate classroom performance no later than the second consecutive year of the *ineffective* classification).			√			√
Governing board developed definition of inadequacy of classroom performance that aligns with the performance classifications.			√	√	√	
School Leader Evaluation & Support						
Placement and base pay progression on educator salary structure.	√		√	√		√
Salary enhancement for principal/assistant principal career pathway position.	√		√	√		√
Request for educator evaluation and performance classification when hiring outside of the LEA.	√	√	√	√	√	
Assignment of goal/action plan (educator goal plan).	√		√	√		√
Design / selection of professional development programs.	√		√	√	√	

Transfer and contract policies for principals in the lowest performance classification (ineffective).		√	√		√	
Governing board developed definition of inadequacy of classroom performance that aligns with the performance classifications.			√	√	√	
* If *REIL Score* (performance classification) is not available, equivalent evidence of effectiveness will need to be provided. ** Prohibits a continuing teacher who is in the lowest performance classification for two consecutive years from being transferred as a teacher to another school unless the teacher has been given notice of inadequate classroom performance, is subject to an improvement plan, and the governing board approves the transfer.						

A Note on HCMS Reporting to Support Decision-Making

The REILize Decision Support System (RDSS) will also provide district and school leaders with information they need to utilize educator evaluation data in their decision-making. Table 4 provides a brief description of example reports. A more detailed description is included in the Project Narrative Attachment (p. 167).

Table 4: Example Reports in REILize Decision Support System

Report Name	Report Description
Average Observation Score by School	This school-level report allows users to view aggregated observation data for all observed educators groups. **See screenshot on p. 161 in the Project Narrative Attachment**
Observation Scores Heat Map	This report provides a heat map for district-wide observation data, disaggregated by school. **See screenshot on p. 162 in the Project Narrative Attachment**
REIL Score Components Inventory Report	This educator-level report includes each educator's REIL Score, performance classification, and a summary of assessment data used to calculate the REIL Score.
Human Capital Management System Report	Provides an LEA-wide view of how many teachers fall into each of the four performance classification categories. There are four "Report Views" available. **See screenshot on p. 164 in the Project Narrative Attachment**
Professional Development Planning Report	Run a multi-view report at the district-, school-, and/or educator-level. Observation summary statistics are broken up into: *Highest & Lowest*, *Power Indicators*, *Early Warning Sign*, and *High-Leverage* elements. **See screenshot on p. 162-163 in the Project Narrative Attachment**
Student Growth Drill Downs	Leaders access up to four levels of drill downs associated with the individual-level components of a teacher's REIL Score. Determine strengths/weaknesses by assessment/subject to enable the planning of differentiated PD. **See screenshot on p. 160 in the Project Narrative Attachment**
Raw Data Export – Performance Data	Allows leaders to download an Excel spreadsheet with observation performance scores, scorecard performance measures, and all demographic data associated with all educators in their organization. Leaders can organize and sort data to fit their planning needs.

Observation Cycle Report	Shows a teacher's individual observation scores by cycle.
Summative Cycle Report	Shows a Teacher's individual observation scores across all of his/her completed observation cycles.
Educator Goal Plan Mgmt. Page	Enables leaders to create and manage EGP goals for all educators. **See screenshot on p. 161 in the Project Narrative Attachment**

1.3 Absolute Priority: The human capital strategies the LEA uses or will use to ensure that high-need schools are able to attract and retain effective educators.

Opportunity Culture → A unique aspect of recruitment efforts will be the advertisement of the *OC Initiative*. Public Impact has reported that implementation of this initiative, which promotes equitable access to effective educators, has increased candidate pools by attracting large numbers of strong applicants. "Districts and schools offer new roles that extend the reach of excellent teachers and their teams to more students, for more pay, within recurring budgets and without forcing class-size increases. The new roles put districts in a much stronger position to hire great teachers—but only if they recruit and select well."◆A **Recruitment Toolkit** walks districts and schools through the major steps of a successful recruiting effort. The toolkit addresses key details, such as the timing of recruitment, to attract a large pool of excellent candidates and capture their interest before they commit to other jobs. Strong recruitment enables districts to attract great candidates regionally, even nationally, who could be a perfect fit for an *OC* role. ◆*OC* schools have attracted large numbers of strong applicants by offering high-paid advanced roles to great teachers. In 2014-15, schools received as many as 22 applicants for every open advanced role position. Applicants appear compelled by the high pay, but also by the chance to advance in their careers while continuing to teach.

Financial Strategies → To attract and retain effective educators, **financial** strategies include: (1) strategic compensation including base pay progression on the educator salary structure that is tied to the *REIL Score,* and the ability to progress more quickly to higher salaries (based on

effectiveness) than a traditional salary schedule; (2) retention stipends for effective educators that remain in the LEA; and (3) salary enhancement for effective teachers accepting a teacher leader role (Reach Extension) in a Spotlight School. ◆In addition to these strategies are some non-traditional financial strategies including making sure educators have access to loan forgiveness, home mortgage assistance, and linking teachers to resources that reduce their expenses. **Non-Financial Strategies →** Non-financial strategies include: regular feedback and high-quality PD; opportunities for shared leadership; and the opportunity for effective educators to make a difference by taking a risk and serving in a high-need school. Strategies include: (1) frequent feedback via multiple observation cycles; (2) high-quality PD aligned to the LEA-wide common vision of instructional improvement; (3) individualized EGPs aligned to evaluation results; (4) increased opportunities to work in schools led by effective/highly effective principals/ assistant principals; (5) opportunity to directly participate in the development and implementation of a coherent and comprehensive HCMS via membership on a *REIL-Extend* LEA-level transition team; (6) reduction in force policies that prohibit the use of seniority as the priority; (7) implementation of HR branding strategies to appropriately communicate a message about the LEA's goals and common vision of instructional improvement; (8) use of sourcing as a HCMS strategy to identify sources of potential high-quality candidates to serve in high-need schools; and (9) implementation of the human-centered design process for inclusive decision-making, including annual, school-level Design Day sessions with ongoing support.

Supporting Policies →LEAs have existing policies in place to support educator recruitment and retention. See *LEA Supporting HCMS Policies* (Project Narrative Attachment, p. 92).

1.4 Absolute Priority: Whether or not modifications are needed to an existing HCMS and a timeline for implementing the described features.

Most LEAs have made the necessary modifications, partially due to legislative changes implemented in Arizona beginning in 2012. This legislation serves as a foundation for many of the HCMS strategies that will be implemented as part of *REIL-Extend*. Current Legislation to Support HCMS Implementation has been included in the Project Narrative Attachment (p. 85) in order to document these policies. ◆A preliminary policy scan was conducted for Kingman USD and Nadaburg USD (LEAs transitioning to a new system) to determine if there were policy obstacles related to HCMS implementation. These *Potential Obstacles to Implementation* have been included the Project Narrative Attachment (p. 90). Examples include policies on staff contracts and compensation, which may need to be revised to account for differential pay, as well as staff assignments and transfers, which may need to be revised to incorporate proposed HCMS strategies related to the transfer of personnel from one school to another. ◆During the planning stages (Oct & Dec 2016) of the *OC Initiative*, Public Impact will assist LEAs in conducting policy scans to identify potential changes to support program implementation. For example, the *Reach Extension* models require flexibility in class size allocations, rostering procedures that allow for students to be assigned to MCTs, and procedures for classified staff ("reach associates") to receive training and performance stipends. ◆Major timelines related to HCMS implementation are reported in Table 5 and serve to highlight the needed program modifications. The timeline for specific implementation/ modification of HCMS activities has been built into the management plan (Table 14 in section D).

Table 5: Implementation Timeline

	16-17	17-18	18-19	19-20	20-21
Performance-Based Evaluation & Support					
Learning, Coaching, Leading observation process					
Incito, MCRSD, MESD, NUSD, RESD, WESD	√	√	√	√	√
KUSD		√	√	√	√
New observation processes for *other school personnel* (e.g., reach associates, reach extension teacher leaders)			√	√	√
Use of evaluation information to inform the design and delivery of district- and school-level PD and instructional support plans [***Meets grant requirement to implement professional development by year 3.***]					
Incito, MCRSD, MESD, NUSD, RESD, WESD	√	√	√	√	√
KUSD		√	√	√	√
EGPs, aligned to results of educator evaluation, according to phase-in schedule (Mgmt. Plan)					
Incito, MCRSD, MESD, NUSD, RESD, WESD	√	√	√	√	√
KUSD			√	√	√
Annual REIL Score calculation.					
Incito, MCRSD, MESD, NUSD, RESD, WESD	√	√	√	√	√
KUSD			√	√	√
HCMS Strategies					
Conduct LEA-level HCMS policy scans and gap analyses to facilitate implementation of HCMS Strategies, equitable distribution of educators, and OC Initiative	√				
Implement action plan to revise policies based on gap analyses		√	√		
Reach Extensions begin in accordance to phase-in plan established in P.I. scope of work		√	√	√	√
Staggered HCMS Strategies: Attract, Place, Retain, Sustain	√	√	√	√	√
Performance-Based Compensation					
PBC in base pay increases*					
Incito, MCRSD, MESD, NUSD, RESD, WESD		√	√	√	√
KUSD			√	√	√
Retention stipends for effective and highly effective educators*					
Incito, MCRSD, MESD, NUSD, RESD, WESD		√	√	√	√
KUSD			√	√	√
PBC stipends for effective/highly effective educators (NUSD)	√				
PBC stipends for effective/ highly effective reach associates (e.g., paraprofessionals support MCT)			√	√	√
Sustainable pay supplements for *reach extension* educators according to phase-in schedule (see Management Plan)		√	√	√	√
* ***Meets grant requirement to implement PBC no later than year 3.***					

IMPROVING TEACHER EFFECTIVENESS AND PROMOTING EQUITABLE ACCESS TO EFFECTIVE EDUCATORS
(Competitive Preference Priority 2)

PROMOTING EQUITABLE ACCESS THROUGH STATE PLANS TO ENSURE EQUITABLE ACCESS TO EXCELLENT EDUCATORS
(Invitational Priority)

→ *Projects that are designed to promote equitable access to effective teachers…*
→ *A description of how the project promotes equitable access to effective educators…*

This section also addresses components of:

- Selection Criteria B.1 *Comprehensive effort to improve teaching and learning…*
- Selection Criteria B.2 *Collaboration of appropriate partners*

"Only one quarter of today's teachers are leading U.S. students to make the kind of growth needed to compete with peers in other nations who lead the world in educational outcomes" (Public Impact, 2015).

OUR PROPOSAL:

① Accurately identify excellent educators.
② Align HCMS activities to the state's Equity Plan.
③ Implement Public Impact's *OC Initiative* in Spotlight Schools.

WORK WE WILL EXTEND:

① Authentic performance classifications
② Strategies aligned to the State's Equity Plan

◆REIL-Extend is strategically designed to take what we have learned from past practice and use that information to promote equitable access to effective teachers, in alignment with the state's Equity plan. ADE's *Ensuring Equitable Access to Excellent Educators in Arizona* plan is included in the Project Narrative Attachment (p. 345). ADE's articulated theory of action (section B.4) is highly aligned with the *REIL-Extend* desire to *retain talent, accelerate equity, expand leadership*, and *reward excellence* (Logic Model in Appendix C), creating the perfect opportunity to align strategies and resources to make a difference for students. In addition, MCESA worked collaboratively with ADE to inform and advise on the state's plan, serving to build our capacity to support this work.

Strategy Area 1: Measuring Educator Effectiveness: We've Got This! ADE's first strategy, strengthening the rating reporting system, focuses on the disconnect across the state between educator evaluation ratings and student achievement – which prevents equitable access. An advantage of REIL-Extend is that we are already able to differentiate performance in a more authentic manner. As an example, between 2013 and 2015, the percentage of effective and highly effective educators in the TIF4 cohort ranged from 56%-70% (aggregated across LEAs). The continuing effort to maintain meaningful distributions will lead to a strong system that actually measures effectiveness, *accelerating access* to effective educators. ◆In addition, our performance-based evaluation and support system will become even stronger with the development of the next iteration of tools that TIF5 funding will support including: refined instruments that tighten up language; new instruments resulting from job redesign; development of "quick-visit" observation tools; inclusion of an advanced Qualified Evaluation Training to re-calibrate continuing observers; and development of enhanced Certified Evaluator Training and Assessment, including the inclusion of a micro-credentialing component. ◆This is highly aligned with ADE's plan to identify ongoing professional training for administrators and evaluators. Aligned *REIL-Extend* activities include: authentic overall effectiveness ratings, robust package of multiple measures, data use trainings, RDSS reports, inter-rater agreement processes/procedures, and ongoing training for administrators/raters.

Strategy Area 2: Effective Retention & Recruitment Strategies to Promote Equitable Access. ADE's second strategy, employing effective retention and recruitment strategies, focuses on the difficulty retaining and recruiting highly effective teachers and the need to use an HCMS to support teacher retention. A teacher shortage is hitting Arizona hard, with up to 62% of public schools reporting unfilled teaching positions, and 23% of Arizona educators will be

eligible to retire in the next four years. Moving highly effective educators from one school to another cannot be the primary solution. If we are going to be short-staffed, it is better to implement models that allow our most effective educators to reach more students. Establishing an *OC* in a subset of *REIL-Extend* high-need schools is our major strategy to promote equitable access to excellent educators. Currently, approximately 20% of our *REIL-Extend* students are receiving instruction from a highly effective teacher. The *OC Initiative* will help us increase that. MCESA will partner with Public Impact to implement the *OC Initiative* in Spotlight Schools (subset of high-need schools), which will be identified during year one of grant implementation. Public Impact will provide technical assistance to MCESA to engage school sites in a process where school level design teams create new staffing and sustainable pay structures that reach more students with excellent teachers in the four core subject areas Additionally, district level design teams will create new staffing and pay structures that reach more schools with excellent leaders. These models increase access to effective educators by "extending the reach" of excellent teachers to more students. For example, in the Multi-Classroom Leadership (MCL) model, teachers with leadership skills both teach and lead teams of teachers in order to share strategies and best practices for classroom success. The MCL determines how students spend time and tailor teachers' roles according to their strengths. A sample job description is included in the Project Narrative Attachment (p. 99). Extending the reach of great teachers promotes equitable access in several ways:

(1) More students benefit directly from excellent teachers' instruction;
(2) Aspiring, novice, and developing teachers have the chance to learn on the job through daily interaction with teacher-leaders, creating a much more intensive learning environment than typical coaching and PD;
(3) Since these advanced roles sustainably pay more (with supplements as high as $23,000, averaging $11,000 nationally), they help attract and retain more excellent teachers to high-need schools; and
(4) With teams of leaders in their schools, excellent school principals can also advance in their careers, earn more, reach more teachers and students, and strengthen the leadership pipeline by attracting more potential leaders and providing them with leadership development on the job.

This is aligned with ADE's plan to support LEAs with employing effective retention and recruitment strategies. The ADE plan also references utilization of an HCMS, support for improved climate and culture, and individualized training based on need in the LEA and school continuous improvement plans. Aligned *REIL-Extend* activities include:

(1) Job redesign and school restructure to incorporate reach extensions (teacher leader roles);
(2) Targeted and job-embedded PD to help educators move up in their performance classification;
(3) Strategic compensation including differential pay/retention stipends based on effectiveness;
(4) Flexibility in hiring practices for principals of high poverty and/or high minority schools, early access to candidates and posting of positions, and use of Title II-A federal grant funds to provide funding sources for recruitment;
(5) Focus on working conditions as a key element to pay attention to at the school-level.

Strategy Area 3: Perception of the Profession. ADE's third strategy, providing incentives for teaching in high-need areas, focuses on changing the negative perception of the profession. The *OC Initiative* mentioned above can serve this purpose well by attracting and retaining excellent educators who seek to advance their K-12 education careers but continue teaching or leading at a school site. Additional aligned REIL-Extend activities include:

(1) Salary enhancement to serve in a teacher leader role at a Spotlight School (reach extensions via OC);
(2) Establishment of "reach associate" positions which can serve the dual purpose of creating an aspiring teacher pipeline while building positive interest in the profession;
(3) Collaborative community of learning through school-level annual Design Days where school teams use human centered design principles to empower educators to intentionally and collaboratively design impactful solutions for complex challenges for their schools; and
(4) Differential pay including retention stipends.

Summary: REIL-Extend will support up to 20 schools in implementing the *OC Initiative* which will result in acceleration of equitable access to effective educators. It will also contribute to a shared strategy of developing teacher leader pathways that keep the best teachers in the direct reach of students (Equity Plan, p. 40, 46), increasing pay in alignment with additional responsibilities (Equity Plan, p. 33, 36), adding new opportunities for aspiring teachers through a redesigned paraprofessional position (Equity Plan, p. 43), and providing protected in-school time for team planning, collaboration, and development (Equity Plan, p. 36) – all of which will improve retention and recruitment efforts.

IMPLEMENTATION OF A PERFORMANCE-BASED COMPENSATION SYSTEM (Requirement 1)

→ *A plan to develop and implement Performance-based Compensation Systems for teachers, principals, and other personnel in High-Need Schools in LEAs.*

"Because teachers across the effectiveness spectrum leave high-poverty, high-minority schools regularly… and are generally replaced by less experienced and effective teachers, bonuses that retain the teachers at the higher end of the effectiveness distribution can have substantial impacts on the quality of a school's faculty" (Springer et al, 2016).

1.1 Requirement: How applicants will implement PBC Systems as defined in this notice.

There are three PBC components to *REIL-Extend's* PBC Model that together increase salaries of the best educators, and increase educator retention in our neediest schools. The measure of effectiveness will be the annual effectiveness rating (REIL Score) which is based, in part, on measurable increases in student academic achievement (section B.1). The PBC components are listed below, with their alignment to the PBC definition included in the application materials.

1. Base salary increases for effective and highly effective teachers. Principals and other school leaders who receive an overall rating of effective or higher.	2. Retention stipends for effective and highly effective teachers, principals, and other school leaders who receive an overall rating of effective or higher and remain in their current LEA.	3. Salary enhancement for highly effective teachers and principals, who serve in a Reach Extension leadership role.
Definition Alignment		
Part (A)	Part (A)	Part (B)

1. Educator Salary Structure Based on Effectiveness

REIL-Extend LEAs will reward excellence through implementation of a restructured salary schedule that increases base pay based on educator effectiveness. Five LEAs will continue the work that was started in 2012 and was organized around the guiding principles listed below. Two LEAs will transition to the this model in years two and three after engaging in stakeholder design

and development meetings facilitated by REIL-Extends Finance/Business Systems Specialist and LEA personnel. These meetings will include financial modeling activities and use of transition teams to prioritize elements to be included in the final salary schedules. This means that NUSD and KUSD will continue their traditional compensation strategy while they engage in the process of redesigning and adopting salary schedules that align to the six *guiding principles*.

Guiding Principles
1. Educator compensation should aligned to a common vision of instructional improvement. 2. Initial salary placement should attract top teaching talent through the establishment of a competitive starting salary. 3. Base pay placement and progression designed to significantly reward long-term performance and rely less on years of experience and education units and degrees. 4. Base pay progression should reward effective educators by reducing the gap between initial and peak earnings. 5. Base pay progression is designed with an established end point. 6. Overall salary structure should be designed to foster collaboration (maximizing the number of educators benefitting from base pay progression), as opposed to competition (limiting the number of educators who can benefit from base pay progression) based on effectiveness.

The timeline for implementation of component 1 is as follows:

Performance-Based Compensation					
PBC in base pay increases*					
Incito, MCRSD, MESD, NUSD, RESD, WESD		√	√	√	√
KUSD			√	√	√
Performance-Based Compensation					
PBC stipends for effective and highly effective educators (NUSD)	√				
PBC stipends for effective and highly effective reach associates (e.g., paraprofessionals support MCT)			√	√	√

2. Retention Stipend

Current research identifies the use of retention stipends for effective educators as a promising practice (Springer et al, 2015) to attract and retain effective teachers (Section B.3). Retention stipends will range from $3,000 to $5,000 (based on recommendations from a literature review) and support the intended outcome to attract, reward, and retain effective educators in high-need schools.

The timeline for implementation of component 2 is as follows:

Performance-Based Compensation					
Retention stipends for effective and highly effective educators*					
Incito, MCRSD, MESD, NUSD, RESD, WESD		√	√	√	√
KUSD			√	√	√

3. Reach Extensions

Competitive base salaries and retention bonuses based upon educator effectiveness are not enough. LEAs face increasingly higher rates of retirement due to an aging workforce and a dwindling supply of new talent. As competition increases for talent, LEAs must be innovative in extending the reach of their most effective educators and training the next generation of educators, all the while maintaining a cost-neutral budget. To solve these challenges, MCESA will partner with Public Impact to support schools in implementing *OC* principles (section B.1) to create *reach extensions* through redesigned job roles in Spotlight Schools. *Reach extensions* will help LEAs find ways to pay the most effective educators 20-130% more (Public Impact, 2013), it will also present opportunities for our most effective educators to exercise leadership to change working conditions without having to leave the profession.

The timeline for implementation of component 3 is as follows:

Performance-Based Compensation					
Sustainable pay supplements for teacher & leader *reach extension* educators according to phase-in schedule (Mgmt. Plan)		√	√	√	√

◆An additional PBC component is the inclusion of a one-time stipend for the following: (1) Completion of Human Resource Certification (principals), and (2) Completion of Principal Supervisor certification (principal evaluators), micro-credentialing components to demonstrate evidence of professional achievement and mastery of content knowledge and leadership skills.

1.2 Requirement: Demonstrate that PBC Systems are developed with the input of teachers and school leaders in the schools and LEAs to be served by the grant.

This is addressed under selection criteria E.1

DOCUMENTATION OF HIGH-NEED SCHOOLS
(Requirement 2)

→ *Demonstrate that the schools participating in the implementation of the TIF-funded PBC systems are high-need schools.*

REIL-Extend includes 44 high-need schools that all meet the poverty criteria. See Appendix G: High Need Documentation.

SIGNIFICANCE
(Selection Criteria A)

→ ***The extent to which the proposed project is likely to build local capacity to provide improve or expand services that address the needs of the target population.***

This section also addresses components of:

- **Selection Criteria B.2** *The extent to which the services to be provided involve the collaboration of appropriate partners for maximizing effectiveness of project services.*

"The challenge—and opportunity—… at this juncture is how to combine the best of what we mean by "accountability" with the best of what we mean by "innovation" to create new systems and supports that more successfully reinforce and act on what they value." -Hewlett Foundation

OUR PROPOSAL:

① Utilize the right team and the right tools, at the right time, to achieve REIL Change.
② Build capacity of the state, regional, and LEA level to serve our highest need youth.
③ Extend infrastructure developments to expand the capacity of LEAs.

WORK WE WILL EXTEND:

① Infrastructure to support the work.
② Collaborative alliance of SEA, Regional, LEA, and service provider partners

→ There is something magical that occurs when the *right team* and *right tools* come together at the *right time* to positively influence the education profession. *REIL-Extend* will advance the work of improving the educator workforce by celebrating and institutionalizing the connection between evaluation and support.

Right Team: Implementation of a human capital management system with an educator evaluation & support system at the center requires significant infrastructure and capacity commitments. Through REIL-Extend, multiple organizations will partner with 7 LEAs, creating a high-performing team that support and extend individual LEA capacity to meet the needs of students, teachers, school leaders, and district-office staff to advance their human capital management systems (section B.2). MCESA is uniquely positioned as a regional education service agency to expand the capacity of local LEAs without the resources to implement this types of program on their own. REIL-Extend enables MCESA to assist LEAs in implementing observation tools and processes, assisting with inter-rater agreement and qualified and certified evaluator training, and providing extensive PD opportunities and resources. ◆The Arizona Department of Education IT department also supports and benefits from this partnership. Through development of the RDSS, ADE gains extensive knowledge in the area of data management which extends their capacity to support local LEAs. ◆Basis Policy Research provides the technical expertise necessary to ensure data management and quality measurement services, working with ADE and MCESA to ensure that educators receive robust and timely information that can truly be utilized to inform practice. ◆Lastly, Public Impact will provide the technical assistance necessary to assist LEAs create new staffing and pay structures that reach all students with excellent teachers in the four core subject areas.

Right Tools: A set of inter-connected observation tools and related resources serve as the foundation for a common vision of instructional improvement. Student growth measures (and student assessments in non-tested areas) have been tested and refined, which allow LEAs to include student academic progress as a measure of educator effectiveness at both the school and individual level. ◆RDSS will offer a learning management system (LMS) that will deliver on-

demand professional learning resources to educators. The LMS is integrated into the RDSS in order to connect resources, courses, and videos directly to the educator's observation data reports. An educator will view their observation score, select an element of concern, and be directed to a customized, curated collection of resources intended to support the educator with improving that particular instructional area.◆In addition to existing tools, new tools/strategies will be developed throughout the duration of REIL-Extend that will have a significant impact on the field, including: (1) addition of unannounced observation/walk-through tools to support the transition from best practice to daily practice; (2) enhanced inter-rater agreement strategies, utilizing micro-credentialing to improve observer training; (3) HCMS reporting to assist LEAs in managing educator workforce decisions; and (4) new job roles to expand teacher leadership while staying in direct contact with students. ◆This partnership will result in enhanced capacity at the regional and state level, resulting in a set of resources that any LEA across the state will be able to access in the future to build and enhance their human capital management systems.

Right Time: Arizona's rate of children eligible for free and reduce lunch has increased over the past six years by about 12%. At that same time, our school age Hispanic population has also grown rapidly, disproportionally in our communities with highest poverty. These increases come at a time when we have a large population of teachers nearing retirement and a diminishing talent pipeline to take their place. Lastly, throughout our state, economically disadvantaged and students of color receive instruction at disproportionally higher rates from inexperienced, developing or ineffective, and out of field teachers than their economically advantaged, non-minority peers (ADE Equity Plan). **TIF5 comes at exactly the "right time" to change these statistics**. REIL-Extend will advance educator evaluation and support to the next level,

combining the best of what we know about accountability and support with new innovative strategies to increase access for low-income and minority students to the best educators.

→**The Capacity-Building Impact of REIL-Extend is ENORMOUS!** In order to thoroughly demonstrate how REIL-Extend is likely to build local capacity to provide, improve, or expand services that address the needs of the target population, we felt it was important to provide examples that identify the target population subgroups and the aligned needs and resulting services that would be provided now and well into the future.

Example 1: Building ADE Capacity
Key: T= Teacher; BLA= Building-Level Admin.; DLA= District Level Admin.

Priority Needs of LEAs	Continuing services ADE will be able to provide, improve, or expand as a result of the project	Target Population			Provide	Improve	Expand
		T	BLA	DLA			
Capture observation data electronically in order to guide educator workforce decisions	• Electronic data capture tool		✓	✓	✓	✓	
	• Customizable observation instruments due to configurability options						✓
Use observation data to plan for PD needs	• Data display via reports and dashboards	✓	✓	✓	✓	✓	✓
Connect student rosters to teachers	• Access to RDSS: Rostering	✓	✓	✓	✓	✓	✓
Combine multiple measures into an overall effectiveness rating	• Calculation of an overall effectiveness rating			✓	✓	✓	

Example 2: Building MCESA Capacity

Priority Needs of LEAs	Continuing services MCESA will be able to provide, improve, or expand as a result of the project	Target Population			Provide	Improve	Expand
		T	BLA	DLA			
Multiple measures of classroom practice	• Access to observation tools, growth measures			✓	✓	✓	✓
Student assessments in non-tested areas	• Access to custom assessments for Art, Music, PE, Band, Social Studies, etc.	✓	✓	✓	✓	✓	✓
Observation tools for other educator groups	• Teacher Leader Observation Instrument • Paraprofessional Observation Instrument	✓	✓	✓	✓	✓	

Qualified and certified evaluator training	• Facilitation of Qualified Evaluator Training		✓	✓	✓	✓	
PD resources	• Access to video bank; PD modules	✓	✓	✓	✓	✓	
Connecting educator evaluation results to individual-level professional learning	• Video clips of effective instruction via access to the video bank • PD modules aligned to observation elements	✓	✓	✓	✓	✓	
Capture EGPs electronically	• Electronic Educator Goal Plan platform	✓	✓	✓	✓	✓	✓
Systems for inter-rater agreement	• Certified Evaluator Assessment • Micro-credentialing		✓	✓	✓	✓	✓
HR branding to increase Highly effective recruitment	• Consultant services			✓	✓		

Example 3: Building LEA Capacity

Priority Needs of LEAs	Continuing services LEAs will be able to provide, improve, or expand as a result of the project	Target Population			Provide	Improve	Expand
		T	BLA	DLA			
Capture observation data electronically in order to guide workforce decisions	• Electronic data capture tool		✓	✓	✓	✓	
Use observation data to plan for PD needs	• Data displays via reports and dashboards	✓	✓	✓	✓	✓	✓
Align PD to needs of educator	• Educator Goal Plans to support individual PD based on educator evaluation results	✓	✓	✓	✓		
Determine overall effectiveness of educator	• Calculation of an overall effectiveness rating			✓	✓		
Make informed decisions about hiring, transfers and promotions based upon data	• Use educator effectiveness to determine eligibility for transfers, placement, leadership roles and responsibilities		✓	✓		✓	
Ensure most needy youth have best quality instruction possible	• Dashboards will enable principals to evaluate student placements in appropriate classrooms		✓	✓		✓	
Increase impact of most effective educators	• Ability to use OC design kits to maximize resources to serve all youth	✓	✓	✓		✓	✓

◆ REIL-Extend is positioned with the Right Tools, with the Right Team, and the Right Time to truly accelerate equity throughout our state. We have the team to improve and increase results. Now is the time, to ensure that data is used to the fullest extent possible to ensure our highest need youth have access to the highest quality teacher possible.

QUALITY OF THE PROJECT DESIGN
(Selection Criteria B)

→ *The quality of the design of the proposed project.*

"Building a stronger teacher workforce requires the thoughtful orchestration of multiple processes working together in a human capital system."
-Jeannie Myung, Krissia Martinez, and Lee Nordstrum

OUR PROPOSAL:

① Engage in Focus and Fit HR practices to increase human resource alignment.
② The *Significant Seven* form the foundation of our work.
③ A talented team will lead the way.
④ Our logic model, *Extending REIL Change*, guides the work

WORK WE WILL EXTEND:

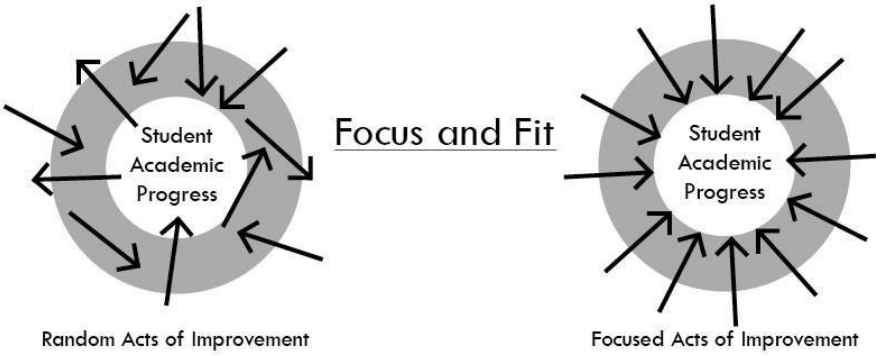
① Quality tools and resources including a robust data management system (RDSS)

B.1 Quality of the Project Design Criteria: The extent to which the proposed project is part of a comprehensive effort to improve teaching and learning and support rigorous academic standards for students.

→ **This section also addresses components of: Selection Criteria B.3** (strong theory)

Focus and Fit: Figure 2 depicts *REIL-Extend's* comprehensive effort to improve teaching and learning and support rigorous academic standards for students. Our goal is to work together and support each other in a culture that values coherence-making. "In many organizations, the problem is not the absence of innovations, but the presence of too many disconnected, episodic, piecemeal projects with superficial implementation" (Fullen, 2004). Through *REIL-Extend*, LEAs will strive to have all of the "arrows" pointing in the same direction, using the concepts of *focus and fit* as described in, *Strengthening the Educator Workforce through Human Resource Alignment*. Focus refers to implementation of Human Resource Management (HRM) practices that "promote acquiring, developing, and motivating educators with the desired competencies and that the practices work together in a coherent way." When we are in *fit* mode, our HRM practices fit with each other in supportive ways rather than staying confined within central office silos.

Figure 2: Focus and Fit



Focus and Fit increase human resource alignment that nudges the arrows that are out of place into the correct direction. In a system with vertical (focus) and horizontal (fit) alignment, there is a common vision of instructional improvement. New hires start with the competencies or ability to develop them. New educators get the head start on competencies from induction and mentoring programs. Leaders encourage and coach for competencies. Performance evaluation and feedback help educators assess their competencies. Educators can easily find PD that develops needed competencies. In a system with low HR alignment, new teachers are on their own to figure out district expectations. Educators see evaluation as a compliance event. There is no direction or help from leaders on what competencies to develop. There is "PD potpourri" with no focus. And there is no pay for performance aligned with a common vision of instructional improvement. REIL-Extend has been designed to be a comprehensive effort to implement high-quality systems (HCMS, PBE, PBC) that result in all of the arrows pointing toward increased student learning, moving from random acts of improvement to focused acts of improvement.

How Do We Get There? The Significant 7!

① Common Vision of Instructional Improvement	② Rater Accuracy and Agreement	③ Multiple Measures of Educator Effectiveness	④ REILize Decision Support System
⑤ High-Quality Professional Learning/EGPs	⑥ Reach Extensions	⑦ Strategic Compensation	

① COMMON VISION OF INSTRUCTIONAL IMPROVEMENT

The Performance Competencies: The observation tools communicate the performance competencies for three educator groups (teachers, coaches, and leaders). These have been included in the Project Narrative Attachment (p. 3). The Learning, Coaching, and Leading Observation Instruments were collaboratively developed with educators across multiple LEAs as part of two prior Teacher Incentive Fund grants and are aligned to national standards (i.e., *InTASC Common Core Teaching Standards; Professional Standards for Educational Leaders; Teacher Leader Model Standards).* Through *REIL-Extend*, we will refine these existing tools and develop additional tools to support implementation of the performance-based evaluation and support system. A document has been included in the Project Narrative Attachment (p. 2) that explains the current status of all observation instruments. Table 6 reports on the new tools that will be developed.

Table 6: New Observation Tools

Tool	Status
Learning Observation Instrument – Unannounced version (for classroom teachers)	• Development SY2016-17 • Validation SY2017-18
Learning Observation Instrument – Walk-through version (for classroom teachers)	• Development SY2016-17 • Validation SY2017-18
Multi Classroom Teacher Observation Instrument (for teachers serving in MCT roles at a Spotlight School)	• Development SY2016-17 • Validation SY2017-18 • Implementation SY 2017-18/ SY 2018-19
Reach Associate Observation Instrument (for paraprofessionals serving in Reach Associate Roles at a Spotlight School)	• Development SY2016-17 • Validation SY2017-18 • Implementation SY 2017-18/ SY 2018-19

→**Connection to *Focus and Fit*:** Articulating a common vision of instructional improvement through integrated observation instruments.

② RATER ACCURACY AND AGREEMENT

A Trustworthy System: The components of an observation system work together and support and reinforce each other (Better Feedback for Better Teaching, 2016). REIL-Extend will support observers through Qualified and Certified Evaluator Training (QET & CET) and Assessment (section C). An enhanced feature of CET will be supported through a paid service providing access to video clips and an online testing tool that will be used for REIL Certified Evaluator Assessment (Observation Engine). In addition, to increase the rigor of CET and more effectively design differentiated evaluator supports, REIL Extend will implement micro-credentialing, which validates and recognizes evaluators for their evaluative and QET skills and competencies. A core component of CET, the co-observation, which pairs MCESA field specialists with school leaders in the field to co-observe teachers in actual practice, and to de-brief after the observations in order to come to consensus on scores. →**Connection to *Focus and Fit*:** Providing feedback to educators in alignment with the common vision of instructional improvement.

③ MULTIPLE MEASURES OF EDUCATOR EFFECTIVENESS

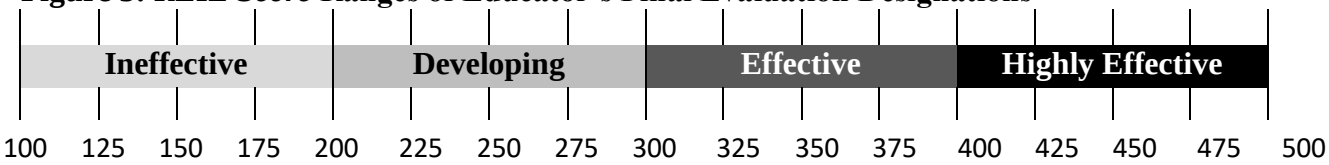
Informing Educator Effectiveness: Each measure in a multi-measure system adds value. Measures for *REIL-Extend* will include observation and student growth date (Table 7). Examples of these measures are described in depth in the REIL Guidebooks that are included in the Project Narrative Attachment (p. 170). In addition to these measures, MCESA will assist LEAs to conduct a gap analysis to determine compliance with *Arizona's Measuring Educator Effectiveness Framework* (see Project Narrative Attachment, p. 411) and identify solutions for any gaps (e.g., student survey).

Table 7: Current Measures

Educator Group	Professional Practice	Student Growth
Teachers	• Total Points from the Learning Observation Instrument • LOI 3+ Rate (Measures the total number of proficient observation scores across all cycles)	• VAM (Individual- & School-level) • CGA (Individual- & School-level) • Percent-Met • Practice Related Growth Index
Coaches	• Average element scores are totaled (within each of the 3 rubrics) and converted into performance scores	• Coached Teacher Cadre (VAM & CGA) • VAM (School-level) • CGA (School-level)
Leaders	• Average element scores are totaled (within each of the 5 rubrics) and converted into performance scores	• Observed Teacher Cadre (Weighted Average of Teacher Performance Scores) • VAM (School- & District-level) • CGA (School- & District-level)

A Primary Tool to Guide HCMS Decision-Making: *REIL-Extend* will utilize the REIL Score, which provides an educator with a performance classification (ineffective, developing, effective, and highly effective) in alignment with Arizona's *Measuring Educator Effectiveness Framework*. The REIL Score (Figure 3) is designed with two objectives in mind: (1) to create a precise and accurate annual measure of educator performance in order to provide feedback; and (2) to create a measure that allows for fair comparisons of the performance of all educators in order to guide HCMS decision-making.

Figure 3: *REIL Score* Ranges of Educator's Final Evaluation Designations



The three steps to determine the REIL Score are explained in-depth in the REIL guidebooks (Project Narrative Attachment, p. 170) and include: (1) converting all performance measures to a common 1-5 point scale; (2) assigning weights to the performance measures and summing each and then all to produce the total *REIL Score*; and (3) using this total score to determine the educator's performance classification. An example of the general weighting for teachers,

coaches, and administrators is presented in Table 8. *REIL Scores* fall between 100 and 500 (calibrated to have a mean of 300 and a standard deviation of 75).

Table 8: Weighting of Individual Performance Measures within the *REIL Score*

	Classroom-Level Growth	School-Level Growth	Observation*
Teachers	*40%*	*10%*	*50%*
Coaches	*40%*	*10%*	*50%*

	Observed Teacher Cadre	School- Level Growth	District-Level Growth	Observation
School Leaders	*5%*	*40%*	*5%*	*50%*

→C**onnection to *Focus and Fit*:** The measures informing annual evaluation scores (and resulting performance pay) are aligned to common vision of instructional improvement.

④ REILIZE DECISION SUPPORT SYSTEM

HCMS Decision-Making Support: In May of 2013, the USDOE identified the RDSS as a "**Promising Practice**" and stated: "The Department is impressed with MCESA's vision for the RDSS, which not only incorporates numerous data verification steps, but also provides opportunities for educators to drill down to specific classroom-level and student-level data to drive instruction. In addition, the RDSS will provide educators with targeted PD opportunities that are specifically aligned to their needs as determined by the data. While many of the systems and processes incorporated into the RDSS typically stand alone, the RDSS is an integrated and apparently seamless approach that should greatly help teachers and principals make decisions to improve instruction." ◆RDSS provides tools to facilitate decision-making (i.e., Identity Management Report, Educator Participation Page, Compensation Group Report, Comprehensive Personnel Report). Single-page observation capture tools will act as the starting point for a wide variety of real-time dashboards and reports. School leaders will utilize REIL Score data to plan PD, make human capital management decisions, and collaborate to create EGPs. Educators will

have access to individual student growth results, multi-year performance results, and online PD to support ongoing professional growth. Educators will track and access PD aligned with areas for professional growth. The RDSS: Rostering tool is the lynchpin for accurately connecting students, teachers, and assessments. Over the course of *REIL-Extend*, RDSS will evolve to include HCMS reporting tools to help monitor equitable distribution of teachers. In addition, enhanced features will be developed that allow LEAs to create student to teacher rosters that identify the best fit between students' academic needs and teacher strengths. *RDSS: Profile* (the main hub for the longitudinal data system) will focus on educator dashboards, reports, and increased configurability to meet the needs of all LEAs (Project Narrative Attachment, p. 159).

→**Connection to *Focus and Fit*:** Coordinates data and resources aligned to common vision of instructional improvement.

⑤ HIGH-QUALITY PROFESSIONAL LEARNING/EDUCATOR GOAL PLANS

Personalized Professional Learning: Educators will participate in an individualized Educator Goal Plan (EGP) system of support that is aligned to educator evaluation results. Educator goals will have two parts: (1) a student achievement goal in an identified content area; and (2) a measurable goal for improved instruction as measured by observation element scores. EGPs are described in depth in Section C (Professional Development Systems).

→**Connection to *Focus and Fit*:** PD opportunities are specifically targeted to help educators improve performance in the areas rewarded by the PBCS.

⑥ OPPORTUNITY CULTURE INITIATIVE / REACH EXTENSIONS

Identify Excellent Educators and Extend Their Reach: The *OC Initiative* will be implemented in Spotlight Schools to extend the reach of *REIL-Extend's* best educators. With

excellent teachers and the teaching teams they lead and support, students who:

- Start two years behind – catch up by having excellent teachers 4 years in a row
- Start one year behind – catch up by having excellent teachers 2 years in a row
- Start on grade level- leap ahead to compete with advanced students
- Catch up from behind – can also then leap ahead every year they have an excellent teacher

Through support from Public Impact (section B.2), Spotlight Schools will engage in job-redesign to create hybrid teaching roles that keep the best teachers in direct contact with students. Example roles include: (1) **Multi-Classroom Leadership**, where teachers both teach students and lead teams of teachers and assistants, sharing strategies and best practices; (2) **Time-Technology Swaps** where teachers use digital instruction for limited, age-appropriate periods, freeing a teacher's time while students learn online to teach more students, plan, and collaborate with peers; (3) **Specialization** where teachers can specialize in their best subjects or roles, with paraprofessional support, saving time for teamwork and reaching more students. The Opportunity Culture Initiative has **5 Guiding Principles** to ensure high-fidelity implementation. These include:

1. Reach more students with excellent teachers and their teams
2. Pay teachers more for extending their reach (up to 67% more)
3. Fund pay within regular budgets
4. Provide protected in-school time and clarity about how to use it for planning, collaboration, and development
5. Match authority and accountability to each person's responsibilities

→**Connection to *Focus and Fit*:** Excellent educators are identified in alignment with performance competencies and placed in leadership roles in the highest-need schools. Compensation is based on effectiveness level.

⑦STRATEGIC COMPENSATION

New Ways to Pay: *REIL-Extend* utilizes strategic compensation to attract, retain, and sustain educators. Annual retention stipends reward effective educators for remaining in their current LEA and high-need school. In addition effective educators advance on their salary schedule

based on effectiveness – as opposed to receiving one-time stipends. This allows effective educators to advance more rapidly than a traditional salary schedule allows. Additional detail on compensation is included in the Requirement 1: PBCS section.

→**Connection to *Focus and Fit*:** Compensates educators in alignment with common vision.

B.2 Quality of the Project Design Criteria: The extent to which the services to be provided involve the collaboration of appropriate partners for maximizing effectiveness of project services.

REIL-Extend will bring together an experienced and talented group of partners that will leverage PBC and related supports to "catalyze improvements in a district's human capital management and in student outcomes" (TIF5 NIA).

→ **Maricopa County Education Service Agency**, a regional educational agency, will lead the project, bringing six years of experience supporting LEAs in the development and implementation of human capital management systems. MCESA, whose staff has specialized expertise in a wide variety of areas, can offer support and resources that an LEA might not have access to otherwise (e.g., PD resources, data use, assessment development, financial services). One example of maximizing effectiveness is that MCESA will be able to develop the repository of professional learning resources that will populate the data management system that LEAs will utilize for educator support. A second example is that MCESA can coordinate cross-LEA work, resulting in shared utilization of resources (e.g., development of an observation instrument for *Reach Associates* (paraprofessionals); collecting classroom footage for video bank).

→ **The Arizona Department of Education's Technology Department** will support the next phase of work with development and implementation of the RDSS. *REIL-Extend* will require tools that support all aspects of HCMS decision-making, including those that facilitate equitable distribution of effective educators. By collaborating with ADE, services are maximized because

the project will leverage state systems (e.g., Highly Qualified Teacher database to assist with roles and permissions and the Student Accountability Information System to manage student-teacher course connections). This partnership also allows coordination with other state projects (e.g., see AELAS project in section B.4) that will benefit *REIL-Extend*. For example, the ADE team is working with an assessment vendor to improve data extraction for another department in ADE – which will also support our work. The department has also developed subject matter expertise in designing, building, managing, and fine-tuning application-based observation instruments, course rostering solutions, and performance-based evaluation reporting systems. The next steps will be to make these applications scalable, configurable, and sustainable.

→ **Basis Policy Research** is an organization contributing to the field in the area of performance-based evaluation and compensation systems. Team members have extensive experience in: (1) design, deployment, and refinement of the overall evaluation models; (2) calculation, reporting, and visualization of summative evaluation ratings for educators; (3) development and validation of the observation and student-growth measures comprising summative ratings; (5) design and development of screening tools to enable identification, recruitment, and retention of highly-effective educators; and (5) formative and summative program evaluation. Basis team members will work closely with the ADE team on managing, calculating, and displaying performance evaluation data based on the results of statistical analyses (e.g., value-added analysis). This is another example of how the effectiveness of program services will be maximized.

→ **Public Impact** will provide technical assistance to MCESA and partner LEAs as they create new staffing and pay structures that reach all students with excellent teachers in the four core subject areas, and extend the reach of excellent principals to more schools. Public Impact has experience implementing this initiative across multiple schools nationwide. Their expertise,

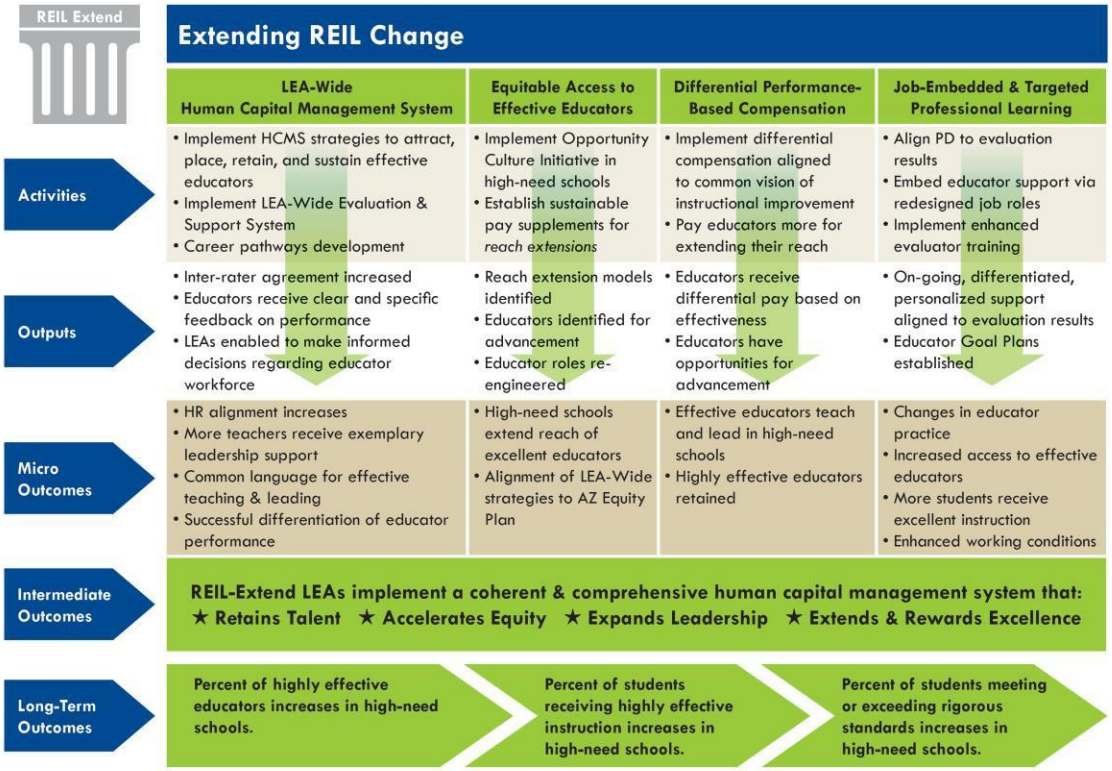
combined with MCESA's support, will ensure LEAs implement high-fidelity models to meet the goals of the project.

◆*REIL-Extend* partners were selected based upon the talent or tools they possess. By selecting these strategic partners, *REIL-Extend* is leveraging existing expertise and infrastructure to minimize costs and increase impact. This strategy reduces total program costs by leveraging expertise to extend best practices and accelerate work.

B.3 Quality of the Project Design Criteria: The extent to which the proposed project is supported by a strong theory

In collaboration with project partners and stakeholders, *REIL-Extend* has created a logic model to guide program implementation (Figure 4). This model is also included in Appendix C.

Figure 4: Extending REIL Change (Theory of Change)



Extending REIL Change (Figure 4) highlights the theory of action that:

→ **If** an LEA-wide HCMS is implemented with a strong educator evaluation and support system at the center; and differential pay is awarded based on effectiveness; and

→ **If** educator roles are re-engineered at high-need schools resulting in new career pathway roles, and educators have more opportunities for advancement; and

→ **If** LEAs are able to retain talent and accelerate equitable access to effective teaching and leading,

→ **Then** the percentage of highly effective educators will increase, the percentage of students receiving highly effective instruction will increase, and the percentage of students meeting or exceeding the standards will increase.

LEA-Wide HCMS (Column 1, Extending REIL Change)

Rationale → "Building a stronger teacher workforce requires the thoughtful orchestration of multiple processes working together in a human capital system" (*A Human Capital Framework for a Stronger Teacher Workforce*, 2013). The authors synthesize HCMS systems into four critical subsystems, which align with *REIL-Extend's* HCMS: strategies, attract, place, retain, and sustain (Absolute Priority section and HCMS Table in the Project Narrative Attachment, p. 89). In the CECR paper, *Strengthening the Educator Workforce through Human Resource Alignment*, the authors explain that strengthening the educator workforce "requires a combination of acquiring and building…educator competencies…and…districts can accomplish this through development and implementation of a competency-focused HRM strategy to guide specific HRM practices. The strategy must incorporate all HR practices, rather than allowing programs such as a performance-based compensation system (PBCS) to stand alone (section B.1). The concepts of vertical and horizontal alignment, outlined in the CECR paper, have also informed development of the *HR Alignment Innovation Configuration Map* (Project Narrative Attachment, p. 93) which is a tool that will be utilized to guide LEA implementation of HCMS practices as part of the performance reporting process.

Equitable Access to Effective Educators (Column 2, Extending REIL Change)

Rationale → Arizona faces a critical teacher shortage, which will get worse as teacher retirement increases over the next four years. TNTP's 2012 report, *The Irreplaceables*, advises on the importance of retaining excellent teachers and engaging in "smart" retention including: (1) make retention of Irreplaceables a top priority; and (2) strengthen the teaching profession through higher expectations. Accordingly, we will leverage our current excellent teachers and school leaders to reach more students. Public Impact's *OC Initiative* guides teams of teachers and school and district leaders to create models and re-design jobs to include teacher leader and expanded school leader roles, while maintaining class sizes and utilizing sustainable pay enhancements. By extending the reach of the best educators, more students will receive excellent instruction, thereby increasing student learning. At the same time, new leadership roles emerge that offer teachers and school leaders opportunities for advancement that increase retention and the ability to attract excellent educators to high-need schools. ◆Data to support this includes a 2003 study (Hattie) that identified that expert teachers do indeed differ from experienced teachers. "Students who are taught by expert teachers exhibit an understanding of the concepts targeted in instruction that is more integrated, more coherent, and at a higher level of abstraction than the understanding achieved by other students." This study included an extensive review of the literature and concluded that there was demonstrated need for a "focus on dependably identifying, esteeming and encouraging excellent teachers." ◆In addition, Public Impact has released data on their online dashboard: "compared to other schools in the same states, 45% more OC schools achieved high growth, while 46% fewer OC schools showed low growth." We have also included two "vignettes" from the Opportunity Culture website in the Project Narrative Attachment (p. 102) to highlight the results of two school systems (Project L.I.F.T. in Charlotte-

Mecklenburg, N.C; Metropolitan Nashville Public Schools) implementing this initiative. ◆In 2013, its first year of *OC* implementation, four Project L.I.F.T. schools received 708 applications for 19 teaching jobs. In prior years, some Project L.I.F.T. schools saw many positions go unfilled. In the second year, 2014, there were more than 800 applications for 27 new positions, but the quality of those applicants also soared - 145 passed the first phase—roughly a 50 percent increase in quality candidates.

Differential PBC (Column 3, Extending REIL Change)

Rationale → By differentiating pay we will increase both educator retention as well as increase the number of effective educators in high-need schools. In our prior TIF initiatives, LEAs have evolved from implementing separate performance stipends to embedding performance pay in base salaries with an emphasis on sustainability. Current research suggests that retention stipends may contribute to teacher retention (Springer et al, 2015). *REIL-Extend* has identified retention stipends, based on educator effectiveness, as a promising practice to attract and retain effective and highly effective teachers. A recent literature review revealed: "…the retention bonuses mitigate unwanted turnover and have the potential to strengthen leadership and institutional knowledge among the schools' faculty while avoiding financial burdens associated with turnover" (Springer, Swain, and Rodriguez, 2015). In addition, the authors noted they had found "encouraging evidence of a causal link between the bonus offer and retention of high-quality teachers." *REIL-Extend* retention stipends will range from $3000- to $5000- to support the attraction, rewarding, and retention of effective educators in high-need schools.

Job-Embedded PD Aligned to Evaluation Results (Column 4, Extending REIL Change)

As evidenced by our Theory of Change (Logic Model, Appendix C) a core component of *REIL-Extend* is Job-Embedded and Targeted Professional Learning. Guiding this component is the

strong belief that high-quality professional learning leads to changes in practice – for all educator groups. One of the most powerful dimensions of professional learning is the inclusion of feedback. This is well documented in recent literature including reports from the Measures of Effective Teaching (MET) Project, the Carnegie Foundation, and The New Teacher Project. We have included several sources on the important of feedback in the attached Bibliography. An additional report, *Giving Teachers the Feedback and Support They Deserve* (2015), makes the case that "evaluation systems that include high-quality, actionable feedback help teachers realize their potential." They go further to state: "Giving teachers the feedback and support they deserve is what will turn well-meaning evaluation systems into systems of improvement that can be sustained over time." This information supports the emphasis on feedback via the observation process, utilization of Educator Goal Plans, and the ability to access real-time data based on evaluation results through the professional learning resource directory in RDSS.

B.4 Quality of the Project Design Criteria: Integrate with or build on related efforts to improve relevant outcomes, using existing funding streams …

> "Arizona students would benefit from policies and funding that enable schools to attract, support, and retain great teachers and principals." (*AZ Education Progress Meter)*

◆Partners throughout Arizona and the Nation realize the importance of quality educators in our schools. *REIL-Extend* integrates with, and advances, the key work of community, State, and Federal partners. The State's Equity Plan (Competitive Preference Priority 2) provides a framework to describe the symbiotic relationship between these projects. ADE's Theory of Action (condensed version) from the Equity Plan is shown below and provides a foundation on which to build.

If, educator performance evaluation systems are implemented with fidelity, and
If, implementing a comprehensive yet individualized approach to educator retention and recruitment is supported at the state level, and
If, the perception of the profession can be improved to attract more applicants to the workforce,

Then, Arizona LEAs will be better able to retain, recruit and develop excellent educators so that all students, especially students of color and economically disadvantaged, have equitable access to effective instruction and leadership to help them achieve their highest potential in school and beyond.

The Equity Plan identified 3 key strategies. Each strategy is shown below, with the alignment of *REIL-Extend* activities to key resources and a description of the alignment and coordination of efforts which highlights the integration aspects.

Key Strategy 1: On going professional training for administrators and evaluators.

***REIL-Extend* Activities**	**Resource Partners**	**Description of Alignment and Coordination**
Professional Development (Leading, Learning, & Coaching Series)	ADE AELAS	*REIL-Extend* utilizes ADE's Event Management System for course registration and the LMS for delivery of on-line and hybrid PD through RDSS.
	ADE's Professional Development	ADE provides PD opportunities to support school leaders in effective implementation of observation instruments. ADE's mentoring program can help new teachers succeed early in career.
	SIG Program	*REIL-Extend* provides extensive PD and job-embedded follow-up support for some of the State's High need schools. *REIL-Extend* schools that are SIG schools will have the benefit of aligned professional development to advance school improvement goals.
	LEA PD	Local LEA Title dollars will also be utilized to PD in support of individualized Educator Goal Plans, based upon effectiveness.

Key Strategy 2: Human Capital Management Systems for Retention and Recruitment

***REIL-Extend* Activities**	**Resource Partners**	**Description of Alignment and Coordination**
Measure student growth as portion of teacher effectiveness	Arizona Framework for Educator Effectiveness	Framework requires use of observation data and student growth measures to determine educator effectiveness ratings. *REIL-Extend* supports LEAs in development and validation of quality tools and process for combining multiple measures to determine effectiveness.
	Pre-school Gold data clean-up	PDG - is supporting the development to cleanup and get cleaner preschool Student data from Teaching Strategies (which eventually could get leveraged with other assessment vendors)
Roster Tools for Student-Teacher-Course Connection	ADE AZEDs	AzEDS (Education Data Standards) project will automate reporting for LEAs without compromising privacy or reducing LEA control over student data, and will reduce the number of hours it takes to compile and submit data. It will serve as the student-teacher connection data collection source in FY2017.
REILize Decision Support System (RDSS)	AELAS	*REIL-Extend* will integrate with the state's AELAS project which is a comprehensive statewide data solution for education transformation. The system will enable parents, teachers, administrators and policy makers to make smart, effective and efficient decisions affecting student outcomes. ADEConnect, has and will continue to enable *REIL-Extend* LEAs to have an identity management solution that enables secure access to data and tools for things like password reset.

	AzDash SLDS Grant	ADE's AZDash project consolidates and presents student performance data in easy-to-use interactive dashboards, saving teachers time and LEAs money. *REIL-Extend* affords ADE the ability to pilot data migration and reporting to ensure accurate reporting. RDSS builds on learning from ADE's SLDS grant and the State's movement to real-time data collection for each student.

Key Strategy 3: Change Perception of the Profession

***REIL-Extend* Activities**	**Resource Partners**	**Description of Alignment and Coordination**
Competitive Base Pay	Prop 123	Proposition 123 increases payouts from the state's trust lands fund to public schools. LEAs received their first installment in July 2016 and many LEAs plan to utilize funds to increase base salaries which is a core component of an overall compensation package that will increase teacher retention.
	Prop 301 (Fund 11)	*REIL-Extend* will integrate with Arizona's pay-for-performance program which is funded through the state's Classroom Site Fund. This funding source for teacher compensation is made up of three parts (fund 11, fund 12, and fund 13); and can be used for base salary increases (fund 11), performance-based compensation (fund 12) and professional development (fund 13). In 2011, the Legislature amended ARS§15-977 to requiring that a portion of the CSF, fund 12, be linked to individual teacher effectiveness beginning in 2014-2015.
Performance Based Compensation	Prop 301	A school district governing board must adopt a PBCS system to allocate funding from the classroom site fund; individual teacher performance as measured by the teacher's performance classification shall be a component of the school district's portion of the forty percent allocation for teacher compensation based on performance.
Opportunity Culture-Reach Extensions	Arizona Equitable Access Plan Teach to Lead	Arizona's Equitable Access Plan speaks to changing the internal culture of the profession. Strategies such as teacher leadership, mentoring programs, and career pathways align to this work. *REIL-Extend* will support this aspect of the plan through implementation of *Opportunity Cultures* in up to 20 schools. Embracing principles of the national Teach to Lead initiative, *OC* will put teachers in the center of designing new structures for extending the reach of effective educators, and compensating them accordingly. Bringing teacher leadership voice into schools, and compensating them accordingly will help to elevate the profession.
Policy & Resource Alignmen	Title 1 and Title II A Funds	Arizona Equity Plan offers support for LEAs to conduct policy scans and gap analyses to gauge the comprehensiveness and alignment of LEA educator effectiveness policies.
Align fiscal resources to ensure access to effective educators.	Classrooms First	*Classrooms First* is a Governor appointed Task Force looking for sustainable and equitable ways to change the State's funding for schools. *REIL-Extend* inform this work and monitor progress of recommendations. The Arizona Education Progress Meter goal to increase teacher compensation will report on progress and amplify message in community about importance of educators.

One of the roles of the REIL Advisory Council will be to ensure on-going coordination of the multiple initiatives to ensure that lessons learned from *REIL Extend*, and the other projects, can together help accelerate equity throughout the State.

PROFESSIONAL DEVELOPMENT SYSTEMS TO SUPPORT THE NEEDS OF TEACHERS AND PRINCIPALS IDENTIFIED THROUGH THE EVALUATION PROCESS
(Selection Criteria C)

→ *The extent to which each participating LEA has a high quality plan for professional development to help all Educators located in High-Need Schools to improve their effectiveness.*

"To Improve Teaching and Learning, Professional Growth Matters Most." (Archer, et al, 2016)

OUR PROPOSAL:

① Connect evaluation results to individual PD needs.
② Utilize Educator Goal Plans.
③ Build capacity of LEAs by providing a robust set of professional learning resources.
④ Provide educators with access to timely and relevant data to guide decision making.

WORK WE WILL EXTEND:

① Shared utilization of resources
② Infrastructure to support access to personalized professional learning
③ Instruments and growth measures that result in authentic performance classifications
④ Data Management System (RDSS), supporting all educator groups in planning for PD.

◆The following response is organized into two categories: (1) high-quality for PD; and (2) use of disaggregated information.

C.1: The extent to which each participating LEA has a high-quality plan for professional development to help all Educators located in High-Need Schools to improve their effectiveness.

This section focuses on (1) observation processes; (2) observer training; (3) Educator Goal Plans; and (4) extensive access to PD resources through RDSS/LMS. Our Theory of Change (section B.3) identifies Job-Embedded and Targeted Professional Learning as a priority, as high-quality professional learning leads to changes in practice. Additionally, one of the most powerful

components of a PD plan is the inclusion of feedback loops. We include additional information about this in section B.3.

① **The Observation Processes:** In *Better Feedback for Better Teaching* (2016), the authors note: "Significant progress in achievement will require that every teacher gets the individualized feedback and support he or she needs to change practice in ways that better promote student learning." We have found that the identification of the reinforcement and refinement during the post-conference portion of an observation cycle leads to the active engagement on the part of the teacher to try out new practices in the classroom. Receiving this feedback assists educators in seeing gaps that occur between actual and desired performance. Participating in multiple observation cycles is one of the best forms of job-embedded PD. When a teacher sits down for a post-conference, "she now expects to leave with a concrete plan for improving her teaching practice" (*Better Feedback for Better Teaching*), which is the power of a quality observation cycle. *REIL-Extend* LEAs will implement multiple classroom observations, including announced and unannounced, as a core component of job-embedded professional learning. This practice also applies to principals, assistant principals, and teacher leaders. All educator groups will benefit from the provision of specific and timely feedback as part of the evaluation system.

② **Observer Training:** In order for the feedback system described above to thrive, LEAs will need to ensure that "observers have the full set of knowledge and skills that quality observation requires" (Better Feedback for Better Teaching: A Practical Guide to Improving Classroom Observations, 2016). Through *REIL-Extend*, common tools and resources will be developed, which can be leveraged across the multiple LEAs to inform their PD plans. To support teachers in improving their effectiveness, they need strong leaders who understand the observation rubrics

and growth measures and can successfully observe and provide feedback based on the common vision of instructional improvement. Therefore, all LEAs have committed to implement ongoing Qualified and Certified Evaluator Training as a core component of their PD plans.

→**Qualified Evaluator Training (QET):** QET participants will be able to: (1) describe the structure and content of each rubric, performance level, and descriptor; (2) record and analyze evidence from observation settings; and (3) establish inter-rater agreement in a controlled setting. Participants will script and score two classroom observation videos as part of a concluding assessment. A QET "Booster" will also be integrated into PD plans to ensure evaluators have a refresher course that assists in reducing common rater errors and rater bias.

→**Certified Evaluator Training (CET):** CET ensures all evaluators/observers maintain accurate ratings in the field, implement effective observations and conferencing processes, and embed correct conferencing procedures into practice. A priority for CET is the establishment and maintenance of inter-rater agreement defined as "the degree to which two or more evaluators give the same rating to an identical observable situation." Inter-rater agreement is of critical importance as educator effectiveness is determined in part by the scores received on the observation rubrics. For this reason, the focus is on accurately measuring educator practice, not an evaluator's/observer's perception of practice. All evaluators also participate in the annual Certified Evaluator Assessment, which monitors on going inter-rater agreement among evaluators. In order to increase educator access to videos for practice scoring, Observation Engine, an online platform, will be utilized as part of the CET/CEA process.

→**Micro-credentialing**: To increase the rigor of CET, and to more effectively design differentiated evaluator supports, REIL-Extend will implement micro-credentialing. Micro-credentials provide evaluators with a way to gain validated recognition for the skills and

competencies they bring to evaluation as well as those they learn throughout QET. The system allows evaluators to submit evidence, have it reviewed by experts and peers, and earn certification of specific competencies related to evaluating educators. Evaluators may earn up to ten micro credentials throughout the CET process in areas such as: 1) accuracy of scoring; 2) scripting techniques; 3) conference objectives; 4) questioning strategies; 5) reinforcement; 6) refinement; 7) quality of feedback; 8) rational of scores; 9) quality of script; and 10) interpretation of rubric language.

③ **Educator Goal Plans:** Our Theory of Change includes alignment of PD to educator evaluation results as a primary activity and the establishment of EGPs as a primary output. All *REIL-Extend* LEAs will incorporate EGPs into their PD plans as a predominate way educators will receive the individualized support they need. All LEAs will have access to an EGP tool in the RDSS which will help leaders manage the process. At the core of the goal plan is the actual goal, which has two parts: (1) a student achievement focus in an identified content area, and (2) a measurable goal for improved instruction as measured by *LOI* element scores. A sample goal is included below:

Sample Goal: By March 2017, Alex Munoz will show increased proficiency in the ability to plan and deliver English Language Arts lessons using the Instructional Strategies Element: Monitor and Adjust, as evidenced by improved observation scores on the Instructional Strategies rubric, and improved ELA *Informational Comprehension* student achievement on 7th grade AzMerit assessment.

→**Action Plans:** Supporting the goal completion is an electronic plan of action to support each educator in achieving the identified goal. The action plan includes objectives in three areas (planning, instruction, and student learning) aligned to the identified observation element. The plans also include key steps, a *support team member* (e.g., administrator, instructional coach),

frequency and duration of support, and the *evidence* to be used to determine achievement of the objective. An example of the action plan components are shown in Table 9 below.

Table 9: Action Plan Components

Component	Example				
Rubric Element	Monitor and Adjust	**Type of Support**	Planning		
Objectives	The teacher will plan possible adjustments to comprehension lessons using information, print to prepare for extensions, or sub-group interventions within the lesson.				
Description of Support	1. Attend Learning Series: Year 1 workshop "Modifying Instruction" 2. Analyze data with coach to anticipate students who may have misconceptions that will require adjustments to first time teaching. 3. View aligned video clips in video bank. 4. Plan checks for understanding to monitor learning during lesson. 5. Plan lesson 1:1 with coach. 6. Plan lessons with PLC.				
Support Team Member	Instructional Coach	**Frequency**	Bi-Weekly	**Duration**	3 times
Evidence	1. Lesson plans with possible adjustments specific to a sub-objective or learning experience are listed. 2. Possible adjustments are labeled as content, pedagogy, or critical thinking. 3. Students who may require extension or intervention in the lesson based on prior assessment are listed.				

◆EGPs will also support school leaders' growth. Included in the Project Narrative Attachment (p. 123) are the handbooks which describe the EGPs for these educator groups. For school leaders, the EGP action plan will include objectives focused on planning, implementation, and progress monitoring for each identified *LdOI* element in the goal.

④ **<u>Extensive Access to PD Resources and a Robust Learning Management System</u>**

→**On-Demand Professional Learning via the RDSS Learning Management System** – RDSS will offer an integrated suite of tools including a learning management system (LMS) that delivers on-demand, differentiated professional learning resources to educators. The LMS connects resources, courses, and videos directly to the educator's observation data reports. An educator can navigate to their dashboard, view their observation scores, select an element of

concern, and be directed to a customized, curated collection of resources intended to support the educator with improving that particular instructional area.

→ **Video Bank-** The video library will house examples of classroom (multiple content areas and grade bands) and leadership (multiple settings) practices for each of the observation instrument proficiency levels and will assist educators in accessing just-in-time information aligned with the results of their observation feedback as well as the *REIL Score*. One way for educators to access video clips is to click on their observation cycle report inside the observation capture tool, which will take them to the professional learning resource directory where a video clip will already be featured that highlights the next proficiency level the educator is trying to achieve.

→ **Learning, Coaching, Leading, Evaluating Series –** LEAs will have the opportunity to implement the *Learning, Coaching, Leading, and Evaluating Series* as part of their long-term PD plans for different educator groups (teacher, instructional coach, principal, or principal evaluator) to build teacher and leader effectiveness. A three-year PD training series has been developed for each group of educators to establish a solid foundation for all educators across an LEA (Project Narrative Attachment, p. 147). These courses align to observation elements, as well as effective implementation of AZ Content Standards or Professional Standards for Educational Leaders. Implementation guides are also available to support principals in facilitating successful professional learning for their teachers or to support in facilitating successful professional learning for leaders. LEAs will be able to access these modules to inform their PD plans based on educator evaluation results. Many of these modules can also be utilized as part of LEA new educator orientation, induction, and mentoring programs.

Here is an example of a module from the **Learning Series**:

Guided Practice and Check for Understanding - 2 hrs

- *By the end of this module, participants will design a student action aligned to a sub-objective that will provide the student an opportunity to practice the learning and the teacher with learning evidence to effectively check for understanding. Evidence of proficiency will be clearly written student actions aligned to task-analyzed sub-objectives.*
- *Alignment to LOI Elements: Teacher Role, Instructional Approach, Practice/Aligned Activity, and Real-Time Assessment*

Here is an example of a module from the **Leading Series:**

High Functioning Teams (6 hours)

- Participant will build skills of the school leadership team and increase their leadership team's ability to influence the effectiveness of other leaders and teams on their campus.
- *Alignment to LdOI Elements: Collaborative Learning Structures, Accountability for Goals, Group Facilitation*

→ **Opportunity Culture –** Public Impact will coordinate an extensive PD plan for MCTs, one of the reach extension models that will be an option in a Spotlight Schools, which will include a 3-day summer session followed by monthly sessions. The list of the sessions is included in the Project Narrative Attachment (p. 101). Once Spotlight Schools are identified, Public Impact will help support development of the PD plans to support this initiative. Table 10 presents a high-level view of the cross-LEA level 5-Year PD Plan to support *REIL-Extend* educators. Individual LEAs will refine their plans on a yearly basis in collaboration with their assigned field specialist.

Table 10: 5-Year Support Plan for Educators

	16-17	17-18	18-19	19-20	20-21
Performance-Based Evaluation & Support					
Implement *Learning, Coaching, Leading* observation process					
Incito, MCRSD, MESD, NUSD, RESD, WESD	√	√	√	√	√
KUSD		√	√	√	√
Implement new observation processes for *other school personnel* (e.g., reach associates, reach extension teacher leaders)			√	√	√
Use of evaluation information to inform the design and delivery of district- and school-level PD and instructional support plans. (***Meets grant requirement to implement professional development by year 3)***					
Incito, MCRSD, MESD, NUSD, RESD, WESD	√	√	√	√	√
KUSD		√	√	√	√
Implement Educator Goal Plans, aligned to results of educator evaluation, according to phase-in schedule (see Management Plan)					

Incito, MCRSD, MESD, NUSD, RESD, WESD	√	√	√	√	√
KUSD			√	√	√
Implement Qualified Evaluator Training and/or QET Booster	√	√	√	√	√
Implement Certified Evaluator Training, including micro-credentialing component					
Incito, MCRSD, MESD, NUSD, RESD, WESD	√	√	√	√	√
KUSD			√	√	√
Implement selected modules from *Learning, Coaching, Leading, Evaluating* Series based on data					
Incito, MCRSD, MESD, NUSD, RESD, WESD	√	√	√	√	√
KUSD			√	√	√
Implementation of Opportunity Culture PD at Spotlight Schools					
Incito, MCRSD, MESD, NUSD, RESD, WESD		√	√	√	√
KUSD			√	√	√

C.2: The extent to which the plan describes how the participating LEA will use the disaggregated information generated by the proposed educator Evaluation and Support System

◆"Understanding how teachers are performing is an important first step. But the real work lies ahead: understanding how to use that data to help all teachers improve their practice and the outcomes for America's young people" (Feedback for Better Teaching, 2016). *REIL-Extend* will work together and support each other to grapple with using educator evaluation results in meaningful ways. For example, the RDSS will increase LEA capacity to successfully access data. Listed below are seven key examples of how LEAs will use data generated to identify PD needs of educators.

① **Principals and peer evaluators** will utilize observation data as part of the observation cycle post-conferencing process. The first opportunity to get data into the hands of a teacher is during the post-conference with the establishment of a reinforcement and refinement that directly relates to the classroom practice of the teacher. As mentioned in section C.1, there is tremendous power and potential with this process that is often overlooked as a compliance event instead of the job-embedded professional learning opportunity that it can be. With RDSS, teachers can access their

data in real-time and can implement action plans immediately. Multi-year functionality allows for teachers to monitor growth from year-to-year. The *Observation Cycle Report* is the gateway to the on-line PD resources inside the LMS. A teacher can click on any observation score, which will take them to videos and courses aimed at a particular element.

② **School Leaders** will also utilize the RDSS tools and reports to work collaboratively with teachers to establish their educator goal plans (section C.1). The *Educator Goal Plan Management Page* will enable BLAs to create and manage EGP goals. Users will filter by goal elements, content areas, and assessments. This supports the school level Instructional Support Plans which the leadership team uses to establish groupings of educators with common needs and to monitor progress of coaching groups. Each educator and his/her evaluator will annually analyze element scores and student learning data using reports from RDSS and establish a goal to improve the identified achievement goal area of focus.

③ **Principals and their leadership teams** will use data to identify school-wide strengths/weaknesses and to identify patterns relative to rubrics/elements, and content/concepts from student achievement data, informing the school's Continuous Improvement Plan, year-long PD Plan, and short-term Instructional Support Plans. For example, instructional leaders are able to access multiple drill downs associated with a teacher's REIL Score (i.e., *Composite Performance Score by Measure*; *Performance Score and Composite Growth Estimate by Subject*; *Growth Estimate by Grade Level*). Leadership teams can use this information to determine each teacher's strengths/weaknesses by assessment and subject area to enable the planning of differentiated PD. Another example of use is the *Summative Cycle Report* which can be used to identify trends. As well as rubrics/elements where PD might be required. A third example is the

REIL Score Components Inventory Report. Administrators can quickly group educators based on the type(s) of assessment and subject area(s) to which they are attached for student growth calculations, thereby enabling the planning of appropriate differentiated PD groupings.

④ **School-level Leadership Teams** will utilize educator data to manage Instructional Support Plans which guide school-level PD. For example, 3-8 week coaching cycles are implemented for deeper support on each objective of the year-long PD goal. The *Average Observation Score by School* shows aggregated data across all observations for all observed educators for each of the observation instruments. Leadership teams can also look at observations over time to monitor the transfer of new learning to effective application.

⑤ **Principal supervisors** will use data from observation and documentation settings as part of the conferencing process.

⑥ **District-office administrators** will utilize the *Performance Classification Summary Report to* access the performance classification distributions of their educators across the district. The *District/School Comparison* shows the number/percentage of all educators at a particular school in each performance classification compared to the district average.

⑦ **The *Professional Development Planning Report*** is used by district and school leaders to facilitate the provision of PD for educators. An administrator will run a multi-view report at the district-, school-, and/or educator-level. The observation summary statistics are broken up into four categories: *Highest & Lowest*, *Power Indicators*, *Early Warning Sign*, and *High-Leverage* elements. The educator-level data displays the growth on specific elements for every teacher observed on the LOI. The district- and school-level views aim at supporting instructional leaders who will manage support/PD caseloads based on school-level score results.

QUALITY OF THE MANAGEMENT PLAN
(Selection Criteria D)

→ *The adequacy of the management plan to achieve the objectives of the proposed project on time and within budget, including clearly defined responsibilities, timelines, and milestones for accomplishing project tasks.*

"Whenever you plan, you plan to succeed."

(1) Goals, Objectives, and Performance Measures

◆*REIL-Extend's* Goals, Objectives, and Performance Measures are shown in Table 11. The USDOE TIF performance measures are included and aligned to *REIL-Extend's* objectives to facilitate interim and annual performance reporting. The two main goals for *REIL-Extend* focus on core programmatic elements aligned to our Logic Model (see section B.3 for additional information as well as Appendix C). ◆Embedded in the performance measures is the use of a tool called the *HCMS Self-Assessment*. *REIL-Extend* will use this tool, along with the locally-created *Human Resource Alignment Innovation Configuration Map*, to support ongoing implementation of program activities. These tools (Project Narrative Attachment, p. 93) will also serve as a communication tool for utilization in *REIL-Extend* communication team meetings. Utilization of these tools will enable our timely attainment of project goals and objectives. They will also assist in the identification and celebration of project milestones. More information, including a description of these tools, is in the next section.

Table 11: Goals, Objectives, & Performance Measures

GOAL 1: Attract, place, retain, and sustain effective educators through implementation of a high-quality, LEA-wide human capital management system focused on expanding leadership and cultivating an engaged workforce.
Objective 1.1: *REIL-Extend* LEAs will implement high-quality human capital management strategies in alignment with the common vision of instructional improvement.
Performance Measures: **(1)** By 2020, 100% of LEAs will score at the moderate to exemplary level on the HCMS Self-assessment (Section 1: General Structure; Section 2: Recruitment, Selection, and Placement); **(2)** USDOE Performance Measure (d): The number of school districts participating in a TIF grant that use educator eval systems to inform the following human capital decisions: Recruitment; hiring; placement; retention; dismissal; PD; tenure; promotion; or all of the above.

Objective 1.2: REIL-Extend LEAs will implement an LEA-wide performance-based educator evaluation and support system that successfully differentiates performance in order to implement personalized support and feedback for improvement.
Performance Measures: **(1)** By September 30, 2020, 100% of *REIL-Extend* LEAs will score at the moderate to exemplary level on the HCMS Self-assessment (Section 4: PD; Section 5: Evaluation); **(2)** USDOE Performance Measure (f): The percentage of teachers and principals who receive the highest effectiveness rating; **(3)** USDOE Performance Measure (g): The percentage of teachers and principals in high-needs schools who receive the highest effectiveness rating; **(4)** By September 30, 2020, 100% of retained teachers and administrators with REIL Scores will have individual educator goal plans.
Objective 1.3: *REIL-Extend* LEAs will increase the retention rate by expanding leadership opportunities through implementation of a career pathway program.
Performance Measures: **(1)** By September 30, 2020, 100% of LEAs will have a career pathway development program in place for a minimum of 2 educator groups; **(2)** By September 30, 2020, *REIL-Extend* LEAs will maintain or improve the aggregate retention rate of effective and highly effective reach extension educators.
Objective 1.4: *REIL-Extend* LEAs will implement differential compensation based on educator effectiveness and aligned to the common vision of instructional improvement
Performance Measures: **(1)** By September 30, 2020, 100% of LEAs will score at the moderate to exemplary level on the HCMS Self-assessment (Section 6: Recognition & Reward); **(2)** USDOE Performance Measure (a): The percentage of educators in all schools who earned performance-based compensation; **(3)** USDOE Performance Measure (b): The percentage of educators in all High-Need Schools who earned performance-based compensation; **(4)** USDOE Performance Measure (c): The gap between the retention rate of educators receiving performance-based compensation and the average retention rate in each high-need school.
Objective 1.5: *REIL-Extend* LEAs will ensure that at least 33% of the 40% Classroom Site Fund (301) allocation for individual teacher performance is based on the overall effectiveness rating.
Performance Measures: **(1)** USDOE Performance Measure (e): The percentage of performance-based compensation paid to educators with State, local, or other non-TIF Federal resources.
GOAL 2: Redesign high-need schools to accelerate access to effective educators by extending the reach of excellent teachers.
Objective 2.1: *REIL-Extend* LEAs will increase the percentage of students having access to effective and highly effective educators in core content areas.
Performance Measures: **(1)** By September 30, 2020, *REIL-Extend* LEA Spotlight Schools will have reach extension models in place; **(2)** By September 30, 2020, the percentage of students receiving instruction from effective educators will increase by 10%; **(3)** By September 30, 2020, 50% of REIL-Extend students will demonstrate proficiency on the state-administered AZ Merit assessment.

(2) Monitoring Progress

◆**Program Evaluation** supports progress monitoring of project goals, objectives, and performance measures and implementation of program activities. This includes external evaluation to provide timely and unbiased information, including interim feedback, to enable refinements during implementation. *REIL-Extend* will also employ: (1) quarterly *Discover Days*;

(2) quarterly Advisory Council meetings; and (3) utilization of LEA-level self-assessment tools to inform implementation of HCMS practices. These activities will foster a culture of *sense-making* that will build capacity, empower stakeholders, and assist the LEAs in continually moving the work forward.

Quarterly 'Discover Days' Basis Policy Research will lead ongoing Discover Days with the MCESA Management Team as a way to routinely reflect on the progress towards project goals and assist with continuous programmatic improvement. Discover Days will be focused on a data-based approach and will ensure that sufficient time is allocated to the compilation and leveraging of project-related data. For example, Basis Policy Research will analyze correlations between potential leading indicators of student growth such as educator observation ratings to develop an early warning system to help LEA superintendents identify principals and schools in need of additional support to boost educator performance. Analyses such as this one will support data-driven policy and resource allocation decisions to optimally meet project goals

Advisory Council: *REIL-Extend* includes an Advisory Council as one of the communication structures. This group will share views, ideas, and challenges in order to facilitate consistent implementation of the project, and advise on dissemination strategies to communicate information to the field. Basis Policy Research will assist in facilitating these meetings and presenting data in a user-friendly format that can be consumed by stakeholders. An example outcome of this process (and the Discover Days), would be development and dissemination of an implementation guide on how to improve Qualified Evaluator Training for observers.

Utilization of Self-Assessment Tools to Support HCMS Implementation: Twice a year, field specialists will work with their LEA leadership team to engage in a self-reflection process utilizing two human resource related tools. The descriptions of these tools are shown below.

Tool	Description
TIF: Human Capital Management System (HCMS) Self-Assessment	The *Human Capital Management System (HCMS) Self-Assessment* is a comprehensive instrument designed to guide Local Education Agencies (LEAs) in examining their human capital practices with a critical eye toward improvement. The tool is structured around *Human Capital Quality Indicators*—a comprehensive framework developed through an in-depth, collaborative process involving an extensive review of the literature on HCMS and related fields and feedback from TIF grantees. Altogether, 56 quality indicators address six areas of HCMS functioning: General System Design, Recruitment/Selection/Placement, Induction/Mentoring, PD, Evaluation, and Recognition and Reward.
Human Resource Alignment Innovation Configuration Map	This tool provides a continuum of practice for LEAs seeking to move to high-fidelity implementation of HR alignment practices. The tool organizes HR practices into three areas: Strategic Staffing, Talent Management & Development, and Strategic Compensation, and illustrates LEA behaviors that occur in practice in specific sub-categories (e.g., recruitment, selection, placement).

Evaluation Plan Matrix: Table 12 provides an example of the data collection and analytic strategies that will be used to evaluate progress toward the goals, objectives, and performance measures. A comprehensive plan that includes all of the objectives is included in the Project Narrative Attachment (p. 244).

Table 12: Evaluation Plan Matrix

GOAL 1: Attract, place, retain, and sustain effective educators through implementation of a high-quality, LEA-wide human capital management system focused on expanding leadership and cultivating an engaged workforce.		
Objectives	**Data Collection /Sources**	**Analytic Strategies**
1.1: *REIL-Extend* LEAs will implement high-quality human capital management strategies in alignment with the common vision of instructional improvement.	• Semi-structured interviews with principals and central office staff • Annual surveys of educators • LEA employment data (e.g., retention rates, attrition) • Human resource document review • Data from HCMS Self-Assessment and HRA IC Map • RDSS reports • LEA administrative employment data; REIL Scores • LEA financial data / salary schedules	• Qualitative analyses of interview data • Descriptive quantitative analyses of survey data • Cross-sectional and longitudinal descriptive analyses of HCMS Self-Assessment & HRA IC Map • Descriptive quantitative analyses of employment and financial data, salary schedule data, and REIL Scores • Correlational analyses of educator evaluation measures with educator value-added scores

Timeline of Key Evaluation Events: The evaluator will collect and analyze quantitative and qualitative data to understand and improve the implementation and impact of the program's incentives on teacher, principal, and school performance (Table 13).

Table 13: Timeline of Key Evaluation Events

	Year 1				Year 2				Year 3				Year 4				Year 5			
Data Collection																				
	Quarter				Quarter				Quarter				Quarter				Quarter			
Survey & interview instrument/protocol design	X			X			X					X				X				
Interviews with LEA/MCESA leadership/staff		X				X				X								X		
Educator surveys		X				X				X								X		
Co-observation & CEA data			X				X				X				X					
Educator evaluations (REIL Scores) & EGPs	X			X				X				X				X				X
RDSS reporting				X				X				X				X				X
Micro-credentialing data		X		X		X		X		X		X		X		X		X		X
State standardized assessment data			X	X			X	X			X	X			X	X			X	X
LEA finance & HR data/documentation			X				X				X				X				X	
HCMS Self Assessment & HRA IC Map data		X		X		X		X		X		X		X		X		X		X
Analysis																				
Program Implementation			X				X				X				X					
Program Impact					X			X			X	X			X	X			X	X
Performance Feedback																				
Discover Days				X	X	X	X	X	X	X	X	X	X		X	X	X		X	X
Formative Reports		X		X		X		X		X		X		X		X		X		X
Annual evaluation report					X				X				X				X			X
Comprehensive evaluation report																				X
Dissemination of Implementation Guides								X			X				X					X

(3) Project Personnel

KEY PERSONNEL: *REIL-Extend* will be supported with two key personnel. Dr. Lori Renfro, MCESA's Assistant Superintendent for Human Capital Management Systems, will serve as the designated Project Director for the TIF5 grant, overseeing implementation of the TIF5 grant activities. Dr. Janice Johnson will serve as the TIF5 Project Leader. These key personnel have multiple years of experience implementing TIF grants and have led the work with a wide variety of LEAs in multiple contexts: K-12, K-8, and high school districts, as well as rural, urban, and special populations. The Project Director (Dr. Lori Renfro) will be responsible for ensuring successful completion of annual grant requirements, managing the project partnerships, facilitating coordination efforts of the multiple partners, implementing and monitoring the management plan, coordinating contractual services and program evaluation activities, and

supervising the management team. The Project Leader (Dr. Janice Johnson) will be responsible for coordinating all activities under each of the program objectives, ensuring efficient coordination and communication across LEAs. Dr. Johnson will oversee the day-to-day operations of the program, supervise program staff, and work collaboratively with the REIL Advisory Council, LEA administration, and project partners. Kristine Morris, MCESA's Chief Deputy Superintendent, who oversees the direction and management of administration and operations for MCESA, will serve as the authorizing representative for the grant and will provide guidance and support for state and local policy work, and cross-LEA implementation of *REIL-Extend*. Ms. Morris has championed programming for our most at-risk youth, including those serviced through the juvenile detention system. Her efforts will help advance the implementation of *REIL-Extend's* equity work. ◆Resumes are included in Appendix D. Job descriptions for key personnel have been included in the Project Narrative Attachment (p. 251). ◆ MCESA will contribute additional support through agency-funded leadership team positions including: Assistant Superintendent for Educational Innovation (.20FTE); Assistant Superintendent for Economic Management (.25FTE); Director of Communication and Learning Systems (.25FTE); and Administrator for Research and Evaluation (.25FTE).

OTHER PERSONNEL: The scope of this project will require that substantial human resources be allocated in order to ensure successful completion of program goals and objectives. In addition to the expertise and time commitment of the key personnel listed above, *REIL-Extend* will also utilize a strategic staffing model to support the *REIL-Extend* scope of work.

Field Specialists: In MCESA's 2013 Teacher Incentive Fund Monitoring Report, USDOE identified MCESA's use of field specialists (who serve as liaisons to the participating LEAs and schools), as a promising practice, noting that during the onsite monitoring visit, teachers and

principals both communicated that they greatly appreciated the support the field specialists provided. *REIL-Extend* will continue this important position, including LEA-specific and cross-LEA positions, which will also facilitate the transition of 6 LEAs from current participation in TIF3 and TIF4 grants to the TIF5 project.

Peer Evaluators: Peer evaluators have been identified as contributing to a more rigorous performance evaluation system and as a means to improve teaching practice (*Peer Evaluation of Teachers in Maricopa County's Teacher Incentive Fund Program,* 2015). *REIL-Extend* is including a cadre of peer evaluators (15 positions) to support LEAs with providing teachers with content-specific feedback; allowing for more observations (increasing feedback cycles and providing multiple opportunities for teachers to apply the feedback and coaching suggestions); and supporting school leaders in applying the rubrics to increase accurate evaluation ratings.

Management Team: MCESA will also utilize a Management Team which includes positions aligned to the various scopes of work, including HCMS implementation, PD, assessment development, performance-based evaluation & support, and strategic compensation. Positions include: **Opportunity Culture Project Leader (1.0FTE)-** lead MCESA OC design team and program implementation; **Management Analyst (1.0FTE)**-maintain project management timelines for all *REIL-Extend* goals and objectives; **Financial/Business Systems Specialist (1.0FTE)**-support fiscal planning and documentation; **Leadership Administrator (.50FTE)**-oversee implementation of PD aligned to leading, learning and coaching series; **Assessment Administrator (1.0FTE)-** responsible for research and validation of multiple measures of educator effectiveness; and **Data Management System Project Leader (1.0FTE)** -responsible for the coordination of RDSS development activities.

Base Team: Base team personnel will provide support for all aspects of the program. Positions include: **LMS coordinator (1.0FTE)**-ensure educators have access to on-demand PD aligned to their evaluation results; **PD Resource Coordinator (1.0FTE)**- populate the video bank that represent all elements and levels of the observation instruments; **Marketing/Communications Coordinator (1.0FTE)**- support HCMS/ HR branding for LEAs; and **Peer Evaluators** (15 positions)-support implementation of the PBE plan through observations of teachers and provision of feedback, co-observations with school leaders to increase and maintain inter-rater agreement, and on-site support for schools in PD delivery and EGP implementation. Additional agency-funded positions that will support the grant include: Administrator for Fiscal Compliance and Innovation (.35FTE); and Business Services Representative (.25FTE). All positions are represented and described in the Budget Narrative section.

(4) Management Plan with designated personnel, timelines, and milestones

Several timelines have been included in the application including: a high-level HCMS *Implementation Timeline* (Table 5); The *Timeline of Key Evaluation Events* (Table 13); and a *5-Year Support Plan for Educators* (Table 10), outlining performance-based evaluation and support activities. In addition to these timelines, Table 14 (see below) serves to facilitate accomplishment of project activities by identifying key activities, timeframes, and person(s) responsible. Project milestones are also noted to communicate specific deliverables and signify project checkpoints to validate program progress.

Table 14: Program Management Activities

REIL-Extend Activities / Milestones	Timeline	Person(s) Responsible
Staffing		
Utilize multiple data point hiring process to select and hire *REIL-Extend* program staff	Oct 2016-Jan 2017	MCESA Mgmt. Team
Human Capital Management System		
Develop and distribute *A Closer Look* series to provide program overviews for differentiated stakeholder groups	Oct-Dec 2016	MCESA Dir. of Learning & Comm.

Develop and post *FAQ* information on website	Dec 2016	Marketing Coord.
LEAs conduct *REIL-Extend* road-shows	Nov-Dec 2016	Project Leader
Develop Guidebooks for Years 2-5 (Apr-July of each year)	Years 2-5	DMS Project Lead
Establish LEA-level communication plans	Oct-Dec 2016	Proj. Leader; LEA
Monitor and revise communication plans (start *Mar 2017)*	Annually	Project Leader
Milestone: Communication Plans in place for all LEAs	January 2017	
HCMS Strategies		
Establish differentiated HR branding strategies based on LEA needs as an *attract* strategy	June 2017	Marketing Coordinator
Implement Recruitment strategy at Spotlight Schools (Group 1)	Year 1	OC Project Lead; LEA Staff
Implement Recruitment strategy at Spotlight Schools (Group 2)	Year 2	
Implement Recruitment strategy at Spotlight Schools (Group 3)	Year 3	
Job re-design begins at Spotlight Schools based on phase-in schedule (cohort 1 begins Year 1)	Ongoing	
Communicate about retention stipends as a *retain* strategy.	Aug & Feb	LEA Staff
Implement priority selection processes for Spotlight Schools.	Annually	
Implement Behavior Event Interviews as part of multiple data point hiring process at Spotlight Schools	Annually	
Implement Design Days as a *sustain* strategy using human-centered design principles	Annually	Field Specialists; Principals
Utilize multiple data point hiring processes aligned to common vision of instructional improvement as a *place* strategy	Annually	LEA Staff; Field Specialists
Policy Review & Revision		
Implement action plans to revise policies/procedures/educator effectiveness measures based on gap analyses	March 2017	Project Leader LEA staff
Develop recommendations for performance classification and inadequate classroom performance definitions (KUSD, NUSD)	Jan-May 2017	LEA Staff; Field Specialists
Ensure transfer policies for Spotlight School placement for teachers and administrators is in place	Jan-June 2017	
Make necessary policy revision recommendations for policies: Evaluation of Professional Staff Members (KUSD; NUSD)	Jan-May 2017	
Develop necessary policy recommendations for equitable distribution of teachers	SY 2016-17 SY 2017-18	LEA Staff; Field Specialists
Develop governing board policy recommendations regarding alignment of PD opportunities to the principal evaluations	Mar-July 2017	
Develop policy recommendations: PD alignment with LEA-wide HCMS and revised educator salary structure	SY 2013-14	
Develop 301 plan for SY2017-18 that aligns with *REIL-Extend* and state statute	March-June 2017	Field Specialists
Milestone: Governing boards adopt definitions for performance classifications (based on observation, student growth) (KUSD)	July 2017	
Milestone: Governing boards adopt definition of inadequacy of classroom performance (KUSD)	July 2017	

Milestone: Governing Boards adopt revised teacher and school leader administrator evaluation policies	May-August 2017	
Milestone: Revised 301 plans in place	June of each year	
Milestone: Policy alignment to ensure successful implementation of *REIL-Extend* achieved (KUSD; NUSD)	September 2017	
Use of Educator Evaluation Data in Decision Making		
Use of educator evaluation data to inform recruitment, selection and placement of educators (Begin Year 2)	Ongoing	LEA Staff
Use of educator evaluation data to inform placement of students on teacher rosters (Begin Year 2)	Ongoing	Principals
Use of educator evaluation data to inform design and delivery of district- and school-level PD (Begin Year 1)	Ongoing	LEA Staff; Data Coordinators
Use of educator evaluation data to inform personalized Educator Goal Plans (Begin Year 1)	Ongoing	Principals
Monitor observation data (Early Warning System indicators) and develop intervention plans to support teachers (Years 1-5)	October-November	Data Coordinators; LEA staff
Monitor Power Indicators to implement partnering of high performing teachers with those needing support	Year 2	Principals
LEAs take performance classifications into account during annual assignment of students to teachers to equitable access	Year 2-5	LEA Staff
Implement improvement plans based on observation results	Year 1	Principals
Assignment of educator performance classifications (Sep of each year beginning Sep 2017)	Annually	DMS Project Lead
Revise hiring & selection practices; request performance classifications from external candidates; implement multiple data point hiring practices; selection committee procedures	SY 2017-18 / SY 2018-19	LEA Staff
Milestone: EGPs aligned with educator evaluation data results	October 2018	
Milestone: LEAs begin using equitable distribution procedures / performance classifications in placement decisions	August 2018	
Monitoring Progress		
Monitor targets on USDOE performance measures	Quarterly	Data Coordinators
Collect HCMS Self-Assessment Ratings (December & May)	Years 1-5	
Collect IC Map Ratings (December & May)	Years 1-5	
Conduct analysis of current compliance to AZ Measuring Educator Effectiveness Framework	Jan-March 2017	
Establish and implement action plan based on gap analysis to ensure compliance with framework	May 2017	Project Director; Project Lead
Milestone: Establishment of baseline self-assessment ratings	December 2016	
Milestone: LEAs have measures in place aligning to Educator Effectiveness Framework	August 2017	
Milestone: Educator effectiveness measures are identified in alignment with AZ Framework	September 2017	
Performance-Based Evaluation System		
Verify current LEA evaluation systems/policies, administrative procedures, & state statutes (KUSD)	Oct-Nov 2016	Mgmt. Analyst; Field Specialist
Governing Boards adopt list of qualified evaluators	Annually	LEA Staff
Implement observation and feedback cycles per LEA-specific plans (Incito, MCRSD, MESD, NUSD, RESD, WESD)	Years 1-5	

Implement observation and feedback cycles per LEA-specific plans (KUSD)	Years 2-5	Project Leader
Implement qualified and certified evaluator training as described in: Absolute Priority 2.1 / Selection Criteria B.3	Years 1-5	Leadership Admin
LOI overview for teachers and leaders (KUSD)	May-Oct 2017	Project Leader
LdOI overview for leaders (KUSD)	May-Oct 2017	
Establish development plan for new observation tools (e.g., walk-through tools; observation tools for Teacher Leader roles)	March 2017	Project Director; Project Leader
Implement new observation processes (e.g., reach extension teacher leaders; reach associates [para-professionals])	Phase In SY2017-18	
Identify additional measures for educator effectiveness (e.g., student survey)	March 2017	
Establish need for refinements to *professional responsibilities* rubric	Year 1	Project Lead; LLC Field Specialists
Ongoing validation of observation instruments.	Annually	Basis Policy R.
Revisions/refinements to observation instruments based on quantitative and qualitative feedback	Annually	Project Director; Project Leader
Communication reach out for Texts for Teachers and Leaders	Annually Aug & March	Marketing Coord.
Design micro-credentialing program for certified evaluator assessment with Digital Promise	Year 1	LLC Specialists
Begin micro-credentials for principal supervisors	Years 1-2	Project Leader
Begin micro-credentials for teacher supervisors	Years 1-2	Project Leader
Milestone: Evaluators receive Micro-credentials	June 2018 and ongoing	
Establish LEA-specific Peer Evaluator Implementation plans	Year 1	Project Leader
Assessments		
Pre- and Post-Custom Assessments administered (e.g., Art, Music, PE, Band, Social Studies) according to Assessment Plan	Twice a year per plan	Assessment Administrator (AA)
Assessments administered per assessment plan	Year 1-5	AA
Analyze & refresh of current item bank for middle school Social Studies assessments	Oct 2016	AA; Measure Coord. (MC)
Recruit for internal & external stakeholders: in item bank refresh	Nov 2016	AA
Internal & external stakeholders review blueprint considerations	Jan 2017	AA; MC; Data System Spec (DSS)
Social Studies item writing event to populate assessment bank	Mar 2017	
Conduct content & bias review on new item bank questions	June 2017	
Milestone: Create new Social Studies assessments with the updated item bank	Aug 2017	
Collect pre-test data for psychometric evaluation	Aug 2018	MC; DSS
Analyze & refresh of current item bank for Arts & Gen. Ed.	Sept 2018	AA; MC
Conduct psychometric evaluation on pre-test data	Nov 2018	
Recruit for internal & external stakeholders item bank refresh	Nov 2018	AA
Internal & external stakeholders review blueprint considerations	Jan 2019	AA; MC
Arts & Gen. Ed. item writing event to populate assessment bank	Mar 2019	MC; DSS

Collect post-test data for psychometric evaluation	May 2019	
Conduct content & bias review on new item bank questions	June 2019	
Milestone: Create new Arts & Gen. Ed. assessments with the updated item bank	Aug 2019	
Conduct psychometric evaluation on post-test data	Aug 2019	AA; MC
Collect pre-test data for psychometric evaluation	Aug 2020	MC;DSS
Analyze & refresh of current item bank for PE & Music	Sept 2020	AA; MC
Conduct psychometric evaluation on pre-test data	Nov 2020	
Recruit for internal & external stakeholders: item bank refresh	Nov 2020	AA
Internal & external stakeholders review blueprint considerations	Jan 2021	AA; MC
PE & Music item writing event to populate assessment bank	Mar 2021	MC; DSS
Collect post-test data for psychometric evaluation	May 2021	
Conduct content & bias review on new item bank questions	June 2021	
Milestone: Create new PE & Music assessments with the updated item bank	Aug 2021	
Conduct psychometric evaluation on post-test data	Aug 2021	AA; MC
Milestone: Educator evaluation system in place LEA-wide for teachers, instructional coaches, reach extension teacher leaders, and school leaders	August 2019	
PBCS / Educator Salary Schedule		
Establish membership of Cross-District Implementation Team	Oct 2016	Project Leader
LEA-level Design Transition Teams form	Oct 2017	Field Specialists
School-level Design Transition Teams form	Nov 2016	
Facilitation of Implementation and Design Transition Teams for PBCS focus	Jan- July 2017	Proj Lead; OC Proj Leader, Field Spec
Implement School Level Design Day Teams	Nov 2016	Field Specialists
Financial Modeling begins for KUSD & NUSD revised salary schedule proposal; TIF 4 LEAs review and revise current salary structure Dec 2016 TIF 4 LEAs; Jan 2017 KUSD/NUSD	2016-17	OC Project Leader, Financial/Business Systems Specialist
Financial Modeling begins for Retention stipends, Reach Extension salary augmentation proposals, and a one-time stipend for HR certification and leadership supervisor certification	Jan 2016	
Align policy for salary schedule placement based on effectiveness (KUSD & NUSD)	SY 2016-17	Project Director, Field Specialists
Develop policy revision recommendations (Professional Growth / Horizontal Movement on Salary Schedule) KUSD & NUSD	SY 2016-17	
Milestone: PBCS stipend in place for NUSD only	October 2016	
Milestone: Salary augmentation in place for Reach Extension educators	July 2017 for TIF 4 & NUSD July 2018 for KUSD	
Milestone: Retention stipends in place for effective and highly effective educators	September 2017 for TIF 4 & NUSD September 2018 for KUSD	
Milestone: One-time stipend in place for HR certification and leadership supervisor certification	Sept 2017-2021 for TIF 4 & NUSD September 2018-2021 for KUSD	

LEAs place and provide base pay progression on educator salary structure based on effectiveness (SY 2017-18 for TIF 4 LEAs/NUSD SY 2018-19 for KUSD	2017-2019	Project Director, Financial/Business Systems Specialist
Milestone: PBCS in place via revised educator salary structure	August 2017 for TIF 4 LEAs /NUSD August 2018 for KUSD	
REIL Scores distributed to all eligible educators via REILize Decision Support System ***(Sept of each year beginning 2017)***	Annually	DMS Proj Leader & Finance Spec
LEAs roll over classroom site fund & 123 monies for use in Year 6	2017-18	Financial/Business Systems Specialist
LEAs identify and communicate to Reach Extension position educators for PBCS (Nov 2017 for TIF 4 LEAs & NUSD; Nov 2018 for KUSD)	2017-18	Program Director
Milestone: Salary augmentation in place for Reach Extension associates (e.g. paraprofessionals via OC strategy)	July 2018	
Data Management System		
RDSS: Registration, Event Management System (EMS), is enabled for educators to begin registering for PD opportunities	Oct 2016	DMS Project Lead
Release new RDSS: Rostering development (paging; student/teacher-to-roster links; multi-year functionality)	Oct 2016	DMS Project Lead; ADE Proj. Dir.
Establish membership of Cross-District Data Management System (DMS) team	Nov 2016	DMS Project Lead
Configuration Management P. is developed to give districts the ability to set roles & permissions within RDSS	Dec 2016	DMS Project Lead; ADE Proj. Dir.
DMS LEA-level Transition Teams form	Jan 2017	Field Spec
Facilitation of DMS teams (beginning Jan 2016)	Monthly	DMS Project Lead
Establish training outcomes and scheduling related to RDSS component implementation (beginning Jan 2016)	Annually	DMS Project Lead; Program Director
Release new Educator Goal Plan development to capture data points to be used for reporting	Jan 2017	DMS Project Lead; PD Coordinator
Develop video bank production schedule to prioritize observation rubric elements for video capture and production	Jan 2017	PD Resource Coordinator
Feedback loops incorporated to inform and collect feedback from school staff	Beginning Feb 2017	DMS Project Lead; Field Specialists
Modifications to existing Observation Instruments is incorporated into the data capture tools	Feb 2017	DMS Project Lead; Program Director
Establish processes and procedures for assessment delivery of secure assessments	Mar 2017	Program Director; Assessment Coord.
Rostering considerations considered for reach extension positions; action steps identified	April 2017	Program Dir; DMS Admin; Field Spec
Develop new dashboard and reporting components in RDSS	Years 1-5	DMS Project Lead; ADE Proj. Dir.
Populate the Learning Management System (LMS) with new courses and resources	Year 1-5	DMS Project Lead; PD Coordinator
RDSS: Profile enhancements for scorecard & drill down configurability	May 2017	DMS Project Lead; ADE Proj. Dir.
Integration of the Operational Data Store (ODS)	June 2017	ADE Proj Dir
Release Award management functionality in RDSS: Profile	July 2017	DMS Project Lead; Financial Specialist

Implement roster management process	Year 2-5 (begins in Oct)	DMS Project Lead; Data Systems Specialists
Rostering enhancements to support equitable distribution	Year 2-5	DMS Project Lead; DSS
Develop new RDSS reporting & dashboard features to increase content and improve the overall user experience	Year 2-5	DMS Project Lead; ADE Proj Dir; DSS
Implement HCMS talent management components to support the implementation of Opportunity Culture	Year 2-5	DMS Project Lead; Program Director
Release REIL Scores for all educators & begin Award process (begins in Aug)	Year 2-5	DMS Admin
Identify and form teacher and administrator video cadre members upon release of Sep 2017 performance classifications	Sep 2017	PD Coord
Begin videotaping observations for inclusion in video bank	Oct 2017	PD Coord.; Videographer
Gather requirements to support "sourcing" strategies and resulting reports to increase teacher recruitment efforts	Oct 2017	DMS Project Lead; ADE Proj. Dir.
Incorporate teaching certification and teacher preparation program information in an HCMS report	Jan 2019	DMS Project Lead
Milestone: All evaluators entering obs. scores into RDSS	Sept 2017	
Milestone: RDSS houses all tools to support real-time data use	Aug 2017	
Milestone: HCMS dashboards and longitudinal views are used by building- & district-level users to support strategic plans	Mar 2018	
Ongoing refinement and maintenance of RDSS	Years 1-5	Project Dir; ADE
Equitable Access to Effective Educators/ Opportunity Culture Initiative		
Set up MCESA-level parameters	Oct 2016	Public Impact Project Leader; OC Project Leader
Select districts, begin district OC design sessions (#1)	Nov 2016	
Conduct state and district policy scan	Nov 2016	
Support district in school selection process	Dec 2016	
Continue district (#2) and begin Cohort A design sessions (#1)	Jan 2017	
Continue district (#3) and Cohort A school design sessions (#2)	Feb 2017	
Train district in conducting Behavior Event Interviews (BEI)	Feb 2017	
Support district with recruitment materials	Feb 2017	
Continue district (#4) and Cohort A school design sessions (#3)	March 2017	
Support district with candidate selection	March 2017	
Final Cohort A school design sessions (#4)	April 2017	
Prepare Cohort A for implementation	June 2017	
Provide implementation support for Cohort A schools	August 2017	
Conduct selection of Cohort B	August 2017	
Plan and facilitate yearlong PD for Cohort A schools	Year 2	
Conduct site visits	Year 2-5	
Collect school and district data for OC dashboard	Year 2-5	

Support MCESA leading Cohort B school design sessions and implementation preparation.	Year 2-5	
On-going implementation, refinement	Year 3-5	
Collect teacher and student data to provide feedback	Annually	
Milestone: Reach extension models in place.	September 2018	
Milestone: MCESA leading implementation, PD, and selecting cohorts through a gradual release	Year 3	
Professional Development		
LEAs establish annual year-long PD Plans (Mar-Apr) each year	Years 1-5	Field specialists
Establish annual MCESA support plan to provide training and resources to support LEA PD plans	Annually (Mar. of each year)	Project Leader; PD Team
Schools establish Annual PD Plans aligned to Continuous Improvement Plans	Per LEA direction	Principals; Field Specialists
School Leadership Teams establish Instructional Support Plans to support groups of teachers with common needs	Every 6-8 weeks	Principals; Leadership Teams
Milestone: Educator evaluation data is accessible through RDSS to inform professional development (KUSD)	September 2018	
Milestone: Alignment of district- and school-level professional development to educator evaluation results	September 2018	
Implement Educator Goal Plans: Teachers (Phase 1) Group 1: (Incito, MCRSD, MESD, NUSD, RESD, WESD)	Year 1	Project Leader; Field Specialists; LEA staff
Implement Educator Goal Plans: Teachers (Phase 1) (KUSD)	Year 2	
Implement Educator Goal Plans: Leaders (Phase 1) Group 1	Year 1	
Implement Educator Goal Plans: Leaders (Phase 1) (KUSD)	Year 2	
Implement Educator Goal Plans: Teachers (Phase 2) Group 1	Year 2	
Implement Educator Goal Plans: Teachers (Phase 2) (KUSD)	Year 3	
Implement Educator Goal Plans: Leaders (Phase 2) Group 1	Year 2	
Implement Educator Goal Plans: Leaders (Phase 2) (KUSD)	Year 3	
Implement Educator Goal Plans: Teachers (Phase 3) Group 1	Year 3	
Implement Educator Goal Plans: Teachers (Phase 3) (KUSD)	Year 4	
Implement Educator Goal Plans: Leaders (Phase 3) Group 1	Year 3	
Implement Educator Goal Plans: Leaders (Phase 3) (KUSD)	Year 4	
Milestone: Full implementation of EGPs	September 2021	
Qualified Evaluator Training (QET) Booster: Group 1	Year 1 & 4	LLC Field Spec
Qualified Evaluator Training (KUSD)	Year 2 & 5	
Certified Evaluator Training (CET), including co-observations, calibration cadres, and video scoring in *Observation Engine* (Incito, MCRSD, MESD, NUSD, RESD, WESD)	Begin Year 1	LLC Field Spec
Certified Evaluator Training (CET), including co-observations, calibration cadres; video scoring in *Observation Engine* (KUSD)	Begin Year 2	
Milestone: All observers receive qualified and certified evaluator status	September 2018	
Population of PD resources into Learning Management System section of REILize Decision Support System	Ongoing	LMS Coordinator
Implement video clip collection plan to capture footage for prioritized elements (teachers, leaders)	Ongoing	PD Resource Coordinator

Milestone: Prioritized videos completed per plan	September of each year	
Develop modules for Learning Series based on LEA PD Plan needs	Years 1-5	Project Leader; PD Design Team
Develop modules for Coaching Series based on LEA PD Plan needs	Years 1-5	
Develop modules for Leading Series based on established LEA PD Plan needs	Years 1-5	
Implement Learning, Leading, Coaching Series based on LEA PD Plan needs	Years 1-5	LLC Field Spec
Milestone: Modules completed and archived per MCESA PD Plan	September of each year	
Spotlight School Multi Classroom Teachers participate in summer academy	Annually	Public Impact; OC Project Leader
Spotlight School Multi Classroom Teachers participate in monthly PD sessions	Monthly	
Develop content for *Texts for Teachers and Leaders*	SY 2012-13	LLC Field Spec
Implement *Texts for Teachers/ Texts for Leaders*	Years 1-5	Marketing Coord
Overall Program		
Facilitate REIL Advisory Council Meetings. (Beginning Oct 2017)	Quarterly	Project Director /Project Leader
Intergovernmental Agreements (IGAs) signed	Jan 2017	Project Leader
Create introductory communication materials	October 2017	Marketing Coord.
Implement media strategy to explain the *REIL-Extend*	Nov 2016	Dir. Of Comm.
Implementation of Program Evaluation plan (see Timeline of Key Evaluation Events in section E.4) (beginning Feb 2017)	Ongoing	Project Director; Project Leader
Milestone: Annual Evaluation Report.	Annually Years 2-4	
Milestone: Comprehensive Evaluation Report.	December 2021	

REIL-Extend's budget, as described in the Budget Narrative, is appropriately allocated and sufficient to ensure we have the personnel and contractual services required to carry out the full scope of work proposed. The scope includes support for LEAs at three different stages of implementation (prior TIF LEAs, current TIF LEAs, and new LEAs who will need to establish all of the foundational elements to HCMS implementation). The budget accounts for the size of LEAs and the differential supports required for LEAs at each stage of implementation to carry out the full scope of work proposed in the management plan (Table 14)., and is inclusive of Personnel (26.29%) and Contractual (18.9%) costs.

ADEQUACY OF RESOURCES
(Selection Criteria E)

→ *Adequacy of resources for the proposed project.*

"A persistent challenge for all education initiatives is sustaining improvements over time."
Sustaining Your TIF Efforts: A Reflection Guide

OUR PROPOSAL:

① Implement design teams at Spotlight Schools to ensure teacher and school leader input.
② Prioritize focus groups, structured interviews, and survey collection activities.
③ Implement sustainable pay supplements through implementation of reach extensions.

WORK WE WILL EXTEND:

① Stakeholder engagement and communication
② Robust communication structures
③ Funding sources that will allow continued implementation post-grant

E.1: The extent to which the PBCSs are developed with the input of teachers and school leaders in the schools and LEAs to be served by the grant.

◆PBCS elements include the multiple measures that inform educator effectiveness ratings. These were developed with the input of central office staff, teachers, and leaders – in alignment with Arizona's *Measuring Educator Effectiveness Framework*. In addition, teachers wrote the items for the custom assessments which are utilized as part of the assessment plan that informs the REIL score. ◆Across the LEAs, stakeholder input has been and will continue to be collected and utilized. ◆By way of example, *REIL-Extend* has/is incorporating the following features as part of the project based on stakeholder feedback: (1) inclusion of multiple measures of student growth, expanding the student growth element to include categorical growth analysis in addition to a value-added model; (2) modification to the number of observation cycles; (3) inclusion of unannounced/informal walk-throughs as an additional observation measure; (4) the option to include student survey data as one of the multiple measures; (5) the option to include a professional responsibilities rubric as an additional professional practice measure; and (6)

inclusion of a retention stipend for effective educators. ◆As part of *REIL-Extend* implementation, the Spotlight Schools will implement design teams where teachers and school leaders choose and tailor models specifically for their schools, which will involve decision-making around new pay structures and job-roles. This work is specifically related to PBC systems as the pay structures and design roles will be tied to educator effectiveness and the resulting utilization of PBC funds. ◆Partner LEAs utilize a variety of structures to assist in local efforts to collect input and feedback to inform high-quality implementation of their performance-based compensation systems. Communication and Stakeholder Groups (Project Narrative Attachment, p. 248), includes a document that lists the LEA-specific workgroups and activities that inform PBCSs. Table 17 highlights an example of one LEA, Roosevelt ESD.

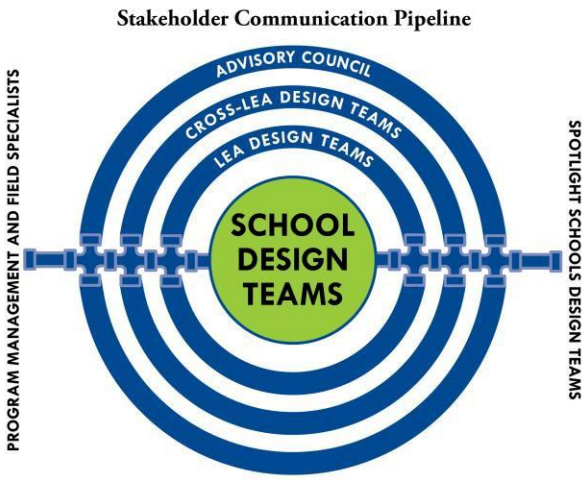
Table 17: Stakeholder Engagement LEA Example: Roosevelt ESD

LEA	Currently Operating Committees/ Workgroups	Data Collection Activities
Roosevelt Elementary School District	• TIF 5 Principal input survey • TIF 5 Teacher input survey • 301 Committee • District Cabinet input • REIL-TNG Basis Policy Research Year 4 Survey	• District survey results • District survey results • Meeting agendas • Meeting agendas • Survey results

◆An example workgroup that is common across most LEAs is a "301 Committee" which refers to Proposition 301, a state-funded pay-for-performance program. This is a primary way that LEAs gather input and feedback directly related to performance-based compensation.

Future Involvement: Cross-LEA collaboration and support amongst multiple stakeholders is necessary for *REIL-Extend*. Future stakeholder engagement has been strategically planned for through implementation of a dynamic communication structure. Figure 5 represents the focus on school design teams which are comprised of teachers and school leaders. These teams are then supported by LEA level and cross-LEA level design teams.

Figure: 5: Stakeholder Communication Pipeline



The stakeholder communication plan is designed to keep the teacher and principal voice at the center of communication. Visualized as a network of connected pipes, school level design teams are connected to all communication efforts via the program staff. The Advisory Council, cross-LEA design teams, and LEA design teams surround schools in order to listen, watch, and stay current of school level needs that will inform higher level decision making. The connected design of the plan and the critical role of the Field Specialist ensures, every principal, teacher, paraprofessional, and support staff opportunity for their ideas, needs, and challenges to be communicated through the network and be used to inform decision making.

The comprehensive communication structure, a *Communication and Stakeholder Groups* table is included in the Project Narrative Attachment (p. 248). Table 16 includes an example.

Table 16: Example of Communication and Stakeholder Group

Group	Who They Are	What They Do
(7) *REIL-Extend* Superintendent Team	MCESA Management Team; LEA Superintendents. Facilitator: Project Leader	Grapple with and exchange information related to identifying and removing obstacles, solving challenges; navigating state policy; identification of strategies for supporting Governing Boards.

E.2: The extent to which the applicant demonstrates a plan to sustain financially the activities conducted and systems developed under the grant once the grant period has expired.

◆ TIF projects aim to create infrastructures that increase educator effectiveness, provide students with access to these teachers, and improve student achievement. "Sustaining these efforts…takes long-term planning and strategic decision-making along the way" (Sustaining Your TIF Efforts: A Reflection Guide, 2015). *REIL-Extend* includes specific design elements in order to enhance and ensure fiscal and programmatic sustainability post-grant.

Sustainability Element: PBC Embedded in Base Salaries: The inclusion of PBC as an embedded component of educator base salaries will increase sustainability. Five LEAs began implementing new salary structures with base salary increases based on effectiveness in SY2014-

15. They will continue this work with *REIL-Extend*. ◆Nadaburg USD and Kingman USD will continue their current compensation strategy during year 1, while they engage in the process of re-designing salary schedules that align to the salary restructure guiding principles (see Requirement 1 section for Guiding Principles). In year 2 and 3, NUSD (Year 2) and KUSD (Year 3) will adopt and transition to new salary structures that provide base pay increases based on effectiveness. ◆Included in the Project Narrative Attachment (p. 239) are LEA-specific sustainability plans that show how the LEAs will implement their strategic compensation strategies. A plan component, LEA efficiencies will serve to increase sustainability. For example, teacher retirements produce salary savings, allowing LEAs to plan for sustainability. LEAs also have access to a new source of funds (Proposition 123) that increases payouts from the state's trust lands fund to public schools. This voter-approved proposition allows LEAs flexibility in the use of these funds which can be leveraged for strategic compensation purposes. Additional information is included in section B.4.

Sustainability Element: Phase-in/Phase-out of retention stipends: *REIL-Extend* LEAs will fund increasing shares of the retention stipend component in years 4 and 5. This strategic phase-in / phase-out plan includes a gradual shift of reliance upon grant funds to reliance upon district funds to ensure sustainability beyond the grant period.

Table 16: Funding for Retention Stipends

PBC Component	Schools	Potential Annual Award	Budget Source
Retention Stipends	Non-Spotlight Schools	Year 1: NA	NA
		Year 2: $3,000	Year 2: 100% TIF / 0% District
		Year 3: $3,000	Year 3: 100% TIF / 0% District
		Year 4: $3,000	Year 4: 67% TIF / 33% District
		Year 5: $3,000	Year 5: 33% TIF / 67% District
	Spotlight Schools	Year 1: NA	
		Year 2: $5,000	Year 2: 100% TIF / 0% District
		Year 3: $5,000	Year 3: 100% TIF / 0% District
		Year 4: $5,000	Year 4: 70% TIF / 30% District
		Year 4: $5,000	Year 5: 40% TIF / 60% District

Sustainability Element: Job Re-design to Create Fiscally Sustainable Teacher Leader and Principal Leader Roles: *REIL-Extend* LEAs will implement *reach extensions* in Spotlight Schools to extend the reach of the best educators – creating opportunities for career advancement, development, and higher pay. This initiative results in new job roles and pay structures in a way that frees up per-pupil funds in order to implement a sustainable model. Since the additions to teacher pay in OC models are completely paid for with reallocation, LEAs will be able to continue using the models without ongoing external funding sources and support.

Sustainability Element: RDSS: When the project ends, LEAs will have continued access to RDSS and its integrated suite of tools which have been described extensively in this grant application. Screenshots have also been included in the Project Narrative Attachment (p. 159).

Additional Information on Sustainability: *REIL-Extend* LEA MOUs demonstrate their commitment to ensure the sustainability of the activities conducted and systems developed under the grant. These are included in Appendix E.

Other Attachment File(s)

*** Mandatory Other Attachment Filename:** Appendix A - Tif Optional Application Requirements

Add Mandatory Other Attachment | Delete Mandatory Other Attachment | View Mandatory Other Attachment

To add more "Other Attachment" attachments, please use the attachment buttons below.

Add Optional Other Attachment | Delete Optional Other Attachment | View Optional Other Attachment

Tracking Number:GRANT12215655 Funding Opportunity Number:ED-GRANTS-053116-002 Received Date:Jul 15, 2016 02:30:38 AM EDT

TIF Application Requirements Checklist (Optional)

To be considered for funding, applicants must address the following general program application and program requirements that the NIA requires. To ensure the fulfillment of every program requirement and authorized activity listed below, the Department strongly encourages the applicant, to indicate the page number(s) where the specific component is located in the program narrative on the left side of the page for the elements of the Absolute Priority and Requirement 1.	
	Absolute Priority: An LEA-wide Human Capital Management System (HCMS) with Educator Evaluation and Support Systems at the Center.
(a) X p. 2 – 12 p. 26 - 34	(a) To meet this priority, the applicant must include, in its application, a description of its LEA-wide Human Capital Management System (HCMS), as it exists currently and with any modifications proposed for implementation during the project period of the grant.
(1) X p. 2-4, 10, 18-20, 29, 31-34	(1) A description of how the HCMS is or will be aligned with the LEA's vision of instructional improvement;
(2) X p. 3 – 9, 23, 16, 32 – 33, 41, 13 - 17	(2) A description of how the LEA uses or will use the information generated by the Evaluation and Support System it describes in its application to inform key human capital decisions, such as decisions on recruitment, hiring, placement, retention, dismissal, compensation, professional development, tenure, and promotion;
(3) X p. 9 – 10, 16, 18 – 20, 33, 34, 38 - 39	(3) A description of the human capital strategies the LEA uses or will use to ensure that High-Need Schools are able to attract and retain effective Educators.
(4) X p. 11 – 12, 28 – 29	(4) Whether or not modifications are needed to an existing HCMS to ensure that it includes the features described in response to paragraphs (1), (2), and (3) of this priority, and a timeline for implementing the described features, provided that the use of evaluation information to inform the design and delivery of professional development and the award of performance-based compensation under the applicant's proposed Performance-based Compensation Systems in High-Need Schools begins no later than the third year of the grant's project period in the High-Need Schools listed in response to paragraph (a) of Requirement 2--Documentation of High-Need Schools.
	Requirement 1: Implementation of Performance-based Compensation Systems:
(b) X P. 4 – 10, 18 - 20 33 – 34, 71 - 72	Each applicant must describe a plan to develop and implement Performance-based Compensation Systems for teachers, principals, and other personnel in High-Need Schools in LEAs, including charter schools that are LEAs.
(1) X p. 9 – 10, 16, 18 – 20, 33 – 34, 71 – 71	Applications must: address how applicants will implement Performance-based Compensation Systems as defined in this notice.
(2) X p. 18- 20, 69 - 71	Applicants also must demonstrate that such Performance-based Compensation Systems are developed with the input of teachers and school leaders in the schools and LEAs to be served by the grant.

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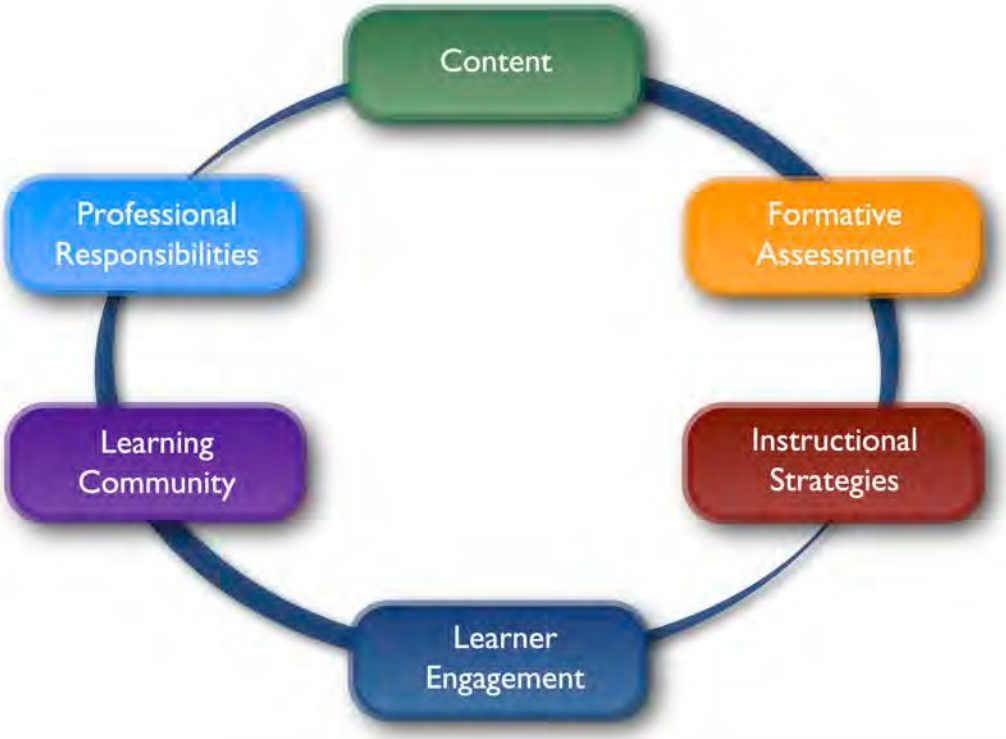
Observation Instruments and Supports

Observation Tool Status

Tool	Status
Learning Observation Instrument (for classroom teachers)	• Development: SY 2010-11 • Validation & Revision: SY 2011-12 • Ongoing validation SY 2012-13 to current • Revision scheduled for SY 2017-18
Learning Observation Instrument: Special Education Overlay (for a subset of self-contained special education teachers)	• Development: SY 2011-12 • Ongoing validation SY 2012-13 to current • Revision scheduled for SY 2017-18
Coaching Observation Instrument (for teachers serving in instructional coaching roles)	• Development: SY 2011-12 • Validation: SY 2012-13 • Ongoing validation SY 2012-13 to current • Revision scheduled for SY 2016-17
Leading Observation Instrument (for building-level leaders)	• Development: SY 2010-11 • Validation & Revision: SY 2011-12 • Ongoing validation SY 2012-13 to current • Revision scheduled for SY 2017-18
Learning Observation Instrument – Unannounced version (for classroom teachers)	• Development SY2016-17 • Validation SY2017-18
Learning Observation Instrument – Walk-through version (for classroom teachers)	• Development SY2016-17 • Validation SY2017-18
Multi Classroom Teacher Observation Instrument (for teachers serving in MCT roles at a Spotlight School)	• Development SY2016-17 • Validation SY2017-18 • Implementation SY 2017-18/ SY 2018-19
Reach Associate Observation Instrument (for paraprofessionals serving in Reach Associate Roles at a Spotlight School)	• Development SY2016-17 • Validation SY2017-18 • Implementation SY 2017-18/ SY 2018-19



Learning Observation Instrument

July 2012

MCESA
Maricopa County Education Service Agency

Acknowledgement Page

The *Learning Observation Instrument* is the result of a collaborative effort to create a cross-district teacher observation tool to be used as part of a performance-based evaluation system. Maricopa County Education Service Agency, along with the six partner districts implementing the federally-funded *Rewarding Excellence in Instruction and Leadership* program, led this comprehensive effort to establish a rigorous, transparent, and fair evaluation system that recognizes excellence and supports the professional growth of teachers.

The following people/groups are acknowledged for their contribution in the development and revision of the REIL Learning Observation Instrument:

Alhambra Elementary School District Teacher Evaluation Transition Team
Gila Bend Unified School District Teacher Evaluation Transition Team
Isaac Elementary School District Teacher Evaluation Transition Team
Nadaburg Unified School District Teacher Evaluation Transition Team
Phoenix Union High School District Teacher Evaluation Transition Team
Tolleson Elementary School District Teacher Evaluation Transition Team

Mikii Bendotti, TIIES Developer
Basis Policy Research
REIL Extend Districts/School Personnel
REIL Cross-District Teacher and Principal Evaluation Teams
REIL Cross-District Rubric-Specific Teams and Super User Group

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Dr. Linda Califano, REIL Field Specialist
April Castillo, REIL Field Specialist
Darcy Moody, REIL Field Specialist
Dr. Greg Sackos, REIL Field Specialist

In addition, several bodies of work were reviewed to assist in the development process including:

Arizona Professional Teaching Standards
DC Impact Teaching and Learning Framework
Frameworks for Teaching (Charlotte Danielson)
Glendale Elementary School District Teacher Evaluation Instrument
In-TASC Model Core Teaching Standards, CCSSO
Teacher Advancement Program Teaching Skills, Knowledge and Responsibility Standards (National Institute for Excellence in Teaching)
Teacher Improvement of Instruction Evaluation System (TIIES), Covey and Associates
Teach for Success Observation Protocol (WestEd)

Rewarding Excellence in Instruction & Leadership

Learning Observation Instrument (classroom teachers)

CONTENT RUBRIC

Aligns with InTASC Standard 2 (Learning Differences), 4 (Content Knowledge), 5 (Application of Content), 7 (Planning for Instruction), and 8 (Instructional Strategies)

The *Content* rubric is designed to support teacher understanding and implementation of effective learning experiences that make content accessible and meaningful for learners to assure mastery of the content. These experiences are facilitated through teacher understanding of how to connect concepts and use differing perspectives to engage learners in critical thinking, creativity, and collaborative problem solving related to authentic local and global issues.

	5	4	3 Proficient	2	1	0
	Meets criteria at levels 3, 4, and 5.	**Meets criteria at levels 3 and 4.**	-	-	-	-
Element	**Descriptors**					
Conceptual Understanding	**Guides all students to create or select their own representations and explanations of concepts;** ensures students demonstrate understanding of concepts through multiple ways/examples. Utilizes questions at essential sub-objectives with increasing complexity or depth of content **that are differentiated according to student cognitive level.** (2a, 2c, 4a, 8i)	Utilizes **effective** representations and explanations of concepts **throughout the lesson** that capture key ideas and details that build conceptual understanding in the discipline; prompts students to demonstrate understanding of concepts through multiple ways/examples. Utilizes questions at essential sub-objectives **with increasing complexity or depth of content**; surface learner misconceptions that may interfere with learning. (2a, 4a, 4e, 8i)	Utilizes representations and explanations of concepts (*e.g., comparisons, analogies, examples, TPR, realia, manipulatives, anchor charts, graphic organizers*) that capture **key ideas and details** that build **conceptual** understanding in the discipline. Utilizes questions **at essential sub-objectives** that support student understanding in the discipline and stimulate discussion for a specific purpose (*e.g., probing for learner understanding, helping learners articulate their ideas and thinking processes, encouraging students to question and analyze ideas from diverse perspectives*). (4a, 4b, 8i)	Utilizes representations **and** explanations of concepts that capture **key ideas** essential to build understanding of the lesson outcome. Utilizes questions within the lesson to probe for learner understanding related to the lesson outcome. (4a, 8i)	Utilizes representations and/or explanations of concepts that capture some key ideas to build understanding of the lesson outcome. Utilizes questions within the lesson to stimulate discussion. (4a, 8i)	

Pre-Conf. | Observation | Post-Conf.

2

Element	5	4	3 Proficient	2	1	0
	Meets criteria at levels 3, 4, and 5.	Meets criteria at levels 3 and 4.	.	.	.	.
	Descriptors					
Task Analysis Pre-Conf. Observation Post-Conf.	Planned/Taught lesson objective(s), sub-objective(s), & materials are logically organized/sequenced in relation to the lesson, unit, and **year-long plan.** (7c)	Planned/Taught lesson objective(s), sub-objective(s), & materials **anticipate possible student misconceptions** and are logically organized/sequenced in relation to lesson and **unit.** (4f, 7b, 7c)	Planned/Taught lesson objective(s), **sub-objective**(s), & materials are aligned to content standards, **segmented for learning, reflect prior learning, and are logically organized/sequenced in relation to the lesson.** (4d, 4f, 7b, 7c)	Planned/Taught lesson objective(s) and materials are **sequenced** and aligned to content standards. (7b, 7c)	Planned/Taught lesson objective(s) & materials are sequenced. (7b, 7c)	
Connections to Content Pre-Conf. Observation Post-Conf.	Engages **students in applying interdisciplinary** content knowledge to a real-world question, problem, issue, or event **through the lens of local and/or global issue(s).** (4b, 5b, 5d, 5g)	Engages **students in applying disciplinary** content knowledge to a **real-world question, problem, issue, or event.** (4b)	**Prompts student reflection** of prior content knowledge; linking new concepts to familiar concepts; makes connections to students' experiences. (2d, 4d)	Activates students' **prior knowledge**; makes connections to students' experiences to enhance understanding of the content. (2d, 4d)	Makes connections to students' experiences to enhance understanding of the content.	
Content Accessibility Pre-Conf. Observation Post-Conf.	Discusses plan for making content accessible for all students at the **individual student level** by identifying and sharing materials/strategies for verbal & instructional scaffolding (*e.g., building background; paraphrasing; adapting materials; modifying tasks, problems, complexity of text; and/or vocabulary*). Provides evidence that multiple sources of data were used in planning for content accessibility, **including (relevant (literacy (performance (data (for (each (student**, IEPs, ILLPs, and relevant assessment data (*e.g., formative assessments*). (2a, 2e, 4f, 5h)	Discusses plan for making content accessible for all students at the **sub-group level** by identifying and sharing materials/strategies for verbal & instructional scaffolding (*e.g., building background; paraphrasing; adapting materials; modifying tasks, problems, complexity of text; and/or vocabulary*). (2a, 2e, 4f, 5h)	Discusses plan for making content accessible for all students at the **sub-objective (level** by identifying and sharing materials/strategies for verbal & instructional scaffolding (*e.g., building background; paraphrasing; adapting materials; modifying tasks, problems, complexity of text; and/or vocabulary*). Provides evidence that appropriate data was used in planning for content accessibility, **including (IEPs, (ILLPs, (and (relevant (assessment (data (*e.g., formative assessments*).** (2a, 2e, 4f, 5h)	Discusses plan for making content accessible for students by identifying and sharing materials **and** strategies for verbal or instructional scaffolding (*e.g., building background; paraphrasing; modifying tasks, problems, complexity of text; and/or vocabulary*). Provides evidence that data was used in planning for content accessibility for **at (least (one (subgroup (of (students.(** (2a, 2e, 4f)	Discusses plan for making content accessible for students by identifying and sharing materials or strategies for verbal or instructional scaffolding (*e.g., building background; paraphrasing; modifying tasks, problems, complexity of text; and/or vocabulary*). Provides evidence that data was used in planning for content accessibility for **at (least (one (student.(** (2a, 2e, 4f)	

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FORMATIVE-ASSESSMENT-RUBRIC-

Aligns-with-InCTASC-Standard-1-(Learner-Development),-6-(Assessment),-7-(-Planning-for-Instruction),-and-8-(Instructional-Strategies)-

The *Formative Assessment* rubric is designed to support teacher understanding and implementation of real time (during & end of lesson) assessment as a strategy to monitor learner progress and to guide ongoing planning and instruction. Effective teachers use real time assessments that are at the correct level of difficulty, aligned to standards based objectives, and engage learners in demonstrating knowledge and skills. In addition, the effective teacher articulates & documents progress that learners have made in relation to the observed lesson objective.

Element	5	4	3 Proficient	2	1	0
	Meets criteria at levels 3, 4, and 5.	**Meets criteria at levels 3 and 4.**	-	-	-	-
	Descriptors					
Real Time (during & end of lesson) **Assessment** (Pre Conf. / Observation / Post Conf.)	Plans appropriate during and end of lesson assessment(s) that are designed to elicit the information necessary throughout the lesson in order to adjust instruction at the **individual student level.** (1a, 6a, 6b, 7d, 8b)	Plans appropriate during and end of lesson assessment(s) that are designed to elicit the information necessary **throughout the lesson** in order to adjust instruction at **the sub group level.** (1a, 6a, 6b, 7d, 8b)	**Plans appropriate during and end of lesson assessment(s)** (*e.g., student recording, artifacts, monitoring notes, verbal response*) aligned to the lesson objectives that are designed to elicit the information necessary to adjust instruction at the **sub objective level.** (1a, 6a, 6b, 7d, 8b)	Plans real time assessment(s) **aligned to the lesson objective,** that are designed to elicit overt responses from students **multiple times** during the lesson. (6a, 6b)	Plans real time assessment(s) designed to elicit an overt response from students. (6a)	
Student Progress (Pre Conf. / Observation / Post Conf.)	Articulates and presents evidence of student progress, relative to rigorous short term (*e.g., unit, series of lessons*) and long term (*e.g., end of year*) goals in order to guide planning. Presents evidence that **nearly all students (95-100%)** met the lesson objective. (6c, 6g, 8b)	Articulates and presents evidence of student progress, relative to **rigorous short term (*e.g., unit, series of lessons*) and long term (e.g., end of year)** goals in order to guide planning. Presents evidence that **most of the students (75-94%) met the lesson objective.** (6c, 6g, 7f, 8b)	Articulates and presents evidence of student progress to guide planning. Presents evidence that **nearly all students (95-100%)** demonstrate progress (*growth*) **relative to the lesson objective.** (6c)	Articulates student progress; **75%-94%** of students demonstrate progress (*growth*).	Articulates student progress; **less than 75%** of students demonstrate progress (*growth*).	
Correct Level of Difficulty (Pre Conf. / Observation / Post Conf.)	Produces evidence that real time assessments are at the correct level of difficulty at the **individual student level.** (6a)	Produces evidence that real time assessments are at the correct level of difficulty at the **sub group level.** (6a)	Produces evidence that real time assessments are at the correct level of difficulty for more than half of the students, as evidenced by pre/prior assessment(s) **and** student work. (6a)	Produces evidence that real time assessments are at the correct level of difficulty **for more than half** of the students, **as evidenced by pre/prior assessment(s) or student work.** (6a)	Produces evidence that real time assessment(s) are at the correct level of difficulty **for less than half** of the students. (6a)	

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INSTRUCTIONAL-STRATEGIES-RUBRIC

Aligns with InTASC Standard 2 (Learning Differences), 3 (Learning Environment), 6 (Assessment), 7 (Planning for Instruction), and 8 (Instructional Strategies)

The *Instructional Strategies* rubric is focused on specific instructional strategies that teachers utilize to ensure learners develop deep understanding of content areas and their connections, and to build skills to apply knowledge in meaningful ways. The teacher varies his/her role in the instructional process (e.g., instructor, facilitator, coach, audience) in relation to the content and purposes of instruction and the needs of learners.

Element	5	4	3 Proficient	2	1	0
	Meets criteria at levels 3, 4, and 5.	**Meets criteria at levels 3 and 4.**	.	.	.	.
	Descriptors					
Teacher Role Pre-Conf. / Observation / Post-Conf.	Varies teacher role (*e.g., teacher led, facilitation of student learning*) effectively and consistently in relation to content and purpose of instruction, **and the needs of individual learners.** (8d)	Varies teacher role (*e.g., teacher led, facilitation of student learning*) effectively and **consistently** in relation to content and purpose of instruction, **and the needs of sub groups of learners.** (8d)	Varies teacher role (*e.g., teacher led, facilitation of student learning*) **effectively** during the instructional process **in relation to content and purpose of instruction.** (8d)	Varies teacher role (*e.g., teacher led, facilitation of student learning*) during the instructional process **to support learning outcome(s).** (8d)	Varies teacher role (*e.g., teacher led, facilitation of student learning*) during the instructional process. (8d)	! !
Instructional Approach Pre-Conf. / Observation / Post-Conf.	Explicitly models an exemplary product/performance, **free of distractions,** by labeling steps or concepts, with precise academic vocabulary and clear articulation of meta cognition. **AND/OR** Presents problems/situations and allows open ended processing of thinking or experimentation; **uses precise academic vocabulary while eliciting student predictions or conjectures about content, and supporting students in justifying their ideas.** (6f, 8d, 8e, 8f, 8i)	Explicitly models an exemplary product/procedure/ performance by labeling steps or concepts with precise academic vocabulary and **clear articulation of meta cognition.** **AND/OR** Presents problem/situation and allows open ended processing of thinking or experimentation; **uses precise academic vocabulary** while clarifying their understandings/ **misunderstandings, developing explanations, and communicating ideas.** (6f, 8d, 8e, 8f, 8i)	**Explicitly** models an exemplary product/procedure/performance by labeling steps or concepts **with precise academic vocabulary.** Supports students, at **essential sub objectives** in using clear academic vocabulary/labels (*verbal, written, (or) non linguistic representation*) **to (solidify) learning.** **AND/OR** Presents problem/situation and allows open ended processing of thinking or experimentation; **uses precise academic vocabulary while clarifying understandings.** Supports students at **essential sub objectives in using clear academic vocabulary/labels** (*verbal, written, (or) non linguistic representation*) **to (solidify) learning.** (8d, 8e, 8f, 8i)	**Models** a task/performance by labeling the steps/criteria. **AND/OR** Presents problem/situation to **allow open ended processing of thinking or experimentation.** (8d, 8e)	Provides clear directions for a procedure or shows an example of a product or performance. **AND/OR** Presents problem/situation with discussion. (8d)	!

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Element	5	4	3 Proficient	2	1	0
	Meets criteria at levels 3, 4, and 5.	**Meets criteria at levels 3 and 4.**	.	.	.	.
	Descriptors					
Practice/ Aligned Activity Pre-Conf. / Observation / Post-Conf.	Engages all students in examining their own thinking **and/or** learning; **students effectively provide support for one another.** (3b, 6f)	Provides sufficient, aligned practice or conceptual development activity **aligned to appropriate sub-objective(s).** **Effectively** provides scaffolding for students **who need assistance and appropriately fades away or renews support as needed to ensure all students** are challenged to move toward independence. (2b)	Provides **sufficient, aligned practice or conceptual development activity** to support **successful learning** of the lesson objective. Actively guides and scaffolds individual students as they practice the objective and move toward independence (*e.g., referencing posted steps, anchor charts, graphic organizers or templates, coaching, questioning, prompting, cueing*). (2a)	Provides opportunity for students to practice the lesson objective before independent practice is assigned; **or** provides opportunity during the conceptual development activity for students to work toward mastery of the lesson objective.	Provides independent practice or conceptual development activity.	!
Feedback (during the lesson) Pre-Conf. / Observation / Post-Conf.	**Prompts all students to utilize tools (*e.g., checklists, rubrics, exemplars, questions*) to assess their own understanding and generate feedback in order to advance their own learning.** (6d)!	Provides academic feedback, **with precise labels,** that is **specific to the needs of the learner.** (6d) !	Provides academic feedback in order to promote learning and retention that: **(1) is aligned at the sub-objective level; (2) references a specific level of skill or knowledge, and (3) is timely.** (6d)	Provides academic feedback that is **aligned to the objective.** (6d)	Provides academic feedback during the lesson. (6d)	!

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Element	5	4	3 Proficient	2	1	0
	Meets criteria at levels 3, 4, and 5.	Meets criteria at levels 3 and 4.	.	.	.	.
	Descriptors					
Monitor and Adjust (use of real time assessment) Pre-Conf. / Observation / Post-Conf.	Checks for understanding by eliciting overt responses from all students at essential sub1 objective levels. Utilizes student responses to appropriately move forward with or adjust one or more of the following at the **individual level**: • Instructional approach (*e.g., pacing, modeling, questioning, guided practice, feedback, etc.*) • Content sub skills or complexity (*e.g. number in problem or Lexile*) • Depth of knowledge • Grouping • Task/Product requirements (2b, 8a, 8b)	Checks for understanding by eliciting overt responses from **all students** at essential sub1 objective levels. Utilizes student responses to appropriately move forward with or adjust one or more of the following at the **sub group level:** • Instructional approach (*e.g., pacing, modeling, questioning, guided practice, feedback, etc.*) • Content sub skills or complexity (*e.g. number in problem or Lexile*) • Depth of knowledge • Grouping • Task/Product requirements (2b, 8a, 8b)	Checks for understanding by eliciting overt responses **from most students (75% or more)** at **essential sub-objective levels**. **Utilizes student responses to appropriately** move forward with or adjust **one or more** of the following: • Instructional approach (*e.g., pacing, modeling, questioning, guided practice, feedback, etc.*) • Content sub skills or complexity (*e.g. number in problem or Lexile*) • Depth of knowledge • Grouping • Task/Product requirements (8a, 8b)	Elicits overt responses from **at least half (50%)** of the students to either move forward with or adjust instruction. (8a, 8b)	Elicits overt responses from a few of the students to either move forward with or adjust instruction. (8a, 8b)	!
Analysis of Instruction Pre-Conf. / Observation / Post-Conf.	Articulates how the results of this lesson **fit into the long range planning** for the content discipline, and identifies effective steps for increasing student learning **at the individual student level** for the next lesson. (7f)	**Articulates how the results of this lesson fit into the content discipline** and identifies effective steps for increasing student learning **at the sub group level** for the next lesson. (7f)	Accurately identifies strengths and/or weaknesses of the lesson/instruction, based on analysis of student work/results, **and identifies effective steps for increasing student learning for the next lesson**. (7f)	**Accurately** identifies strengths and/or weaknesses of the lesson/instruction, **based on analysis of student work/results**. (7f)	Identifies strengths and/or weaknesses of the lesson/instruction.	!

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LEARNER-ENGAGEMENT-RUBRIC

Aligns with InCTASC Standard 2 (Learning Differences), 3 (Learning Environments), 4 (Content Knowledge), 5 (Application of Content), 6 (Assessment), 7 (Planning for Instruction), and 8 (Instructional Strategies)

The *Learner Engagement* rubric is designed to support teachers with establishment of classroom environments that support authentic engagement in learning. The effective teacher understands the relationship between motivation and engagement and knows how to design learning experiences using strategies that build learner self-direction and ownership of learning. The teacher collaborates with learners to develop shared values and expectations for rigorous academic discussions, and individual and group responsibility for quality work. Engagement is both student-to-student and teacher-to-student, and is grounded in development of critical thinking skills focused on content specific process skills. This facilitates authentic engagement where students are not just compliant, but can see a connection between the assigned task and the results/outcomes, and that there is clear meaning and personal relevance.

Element	5	4	3 Proficient	2	1	0
	Meets criteria at levels 3, 4, and 5.	**Meets criteria at levels 3 and 4.**	-	-	-	-
	Descriptors					
Student to Student Interaction Pre-Conf. / Observation / Post-Conf.	**Students respond to shifts in conversation as they explore the topic; different students may emerge as experts** (*e.g., appropriately adjusts within the context, draws on multiple and/or diverse perspectives, challenges assumptions with justification and evidence*) in order to develop expressive language proficiency and demonstrate deep or extended learning. (4b, 4h, 5d, 6f, 8h)	Students engage in **focused learning conversations to build on other students' thoughts/ideas/writing/non-linguistic representation** (*e.g., questioning, piggybacking, summarizing, clarifying, paraphrasing*), in order to develop expressive language proficiency and **demonstrate deep or extended learning.** (4h, 5d, 6f, 8h)	Students engage in **structured, scaffolded** student-to-student academic dialogue aligned to the lesson objective in order to **develop expressive language proficiency and solidify learning.** Students demonstrate individual accountability, **equal participation, application of content vocabulary, and justification of ideas.** (4h, 8h)	Students engage in **structured,** student-to-student academic dialogues (*e.g., reporting, sharing, clarifying*), aligned to the lesson objective. Students demonstrate **individual accountability and use of content vocabulary.** (4h, 8h)	Students engage in student-to-student academic dialogue (*e.g., reporting, sharing, clarifying*). (4h, 8h)	
Teacher to Student Interaction Pre-Conf. / Observation / Post-Conf.	Elicits participation from **all students consistently** throughout the lesson for **each** sub-objective. **Students hold one another accountable for engagement in activities and responses.** (3c)	Elicits participation from **nearly all (95%-100%)** students for **most** sub-objectives, **through a systematic progression of purposeful questions and a variety of activities.** (8i)	Elicits participation from **most (85%-94%)** of the students at significant points during the lesson, through **purposeful questioning and/or activities** (*e.g., speak, write, signal, perform, think*) requires students to engage in covert (*internal*) thinking and provides sufficient wait time before calling on individual students. **Adjusts level of concern to promote mandatory participation through time limits, calling on non-volunteers, pacing, proximity, and/or performance checks.** (8i)	Elicits participation from **more than half** of the students during parts of the lesson, through questioning and/or activities (*e.g., speak, write, signal, perform, think*). **Utilizes questioning strategies that require covert (*internal*) thinking and sufficient wait time before calling on individual students.** (8i)	Elicits participation from **less than half** of the students, during parts of the lesson, through questioning and/or activities. (8i)	

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Element	5	4	3 Proficient	2	1	0
	Meets criteria at levels 3, 4, and 5.	Meets criteria at levels 3 and 4.	.	.	.	.
	Descriptors					
Authentic Engagement Pre-Conf. / Observation / Post-Conf.	Facilitates authentic engagement by: **(1) Involving all students in generating and evaluating new ideas and novel approaches, seeking inventive solutions to problems, and developing original work; and (2) Collaborates with all students to design and implement relevant learning experiences.** (2a, 3b, 5f, 5g, 7a, 8c, 8i)	Facilitates authentic engagement by assigning **differentiated, meaningful tasks that require complex thinking,** that most students associate with a result or outcome that has clear meaning and personal relevance. (2a, 7a, 8c, 8i)	Facilitates authentic engagement by assigning tasks that **most students** associate with a result or outcome that has clear meaning **and personal relevance** (*connects task(s) to learning outcome relative to big idea; purpose for learning*). (7a, 8c, 8i)	Assigns tasks that **some students associate with a result or outcome that has clear meaning.**	Assigns tasks that most students complete to avoid a negative consequence, or achieve an extrinsic outcome (*e.g., reading a book in order to pass a test*).	
Critical Thinking Pre-Conf. / Observation / Post-Conf.	Students use complex reasoning **with planning over an extended period of time in connection with a long-term project, problem, performance, and/or investigation** (*e.g., process multiple conditions of a problem or task; use multiple sources to gather and synthesize information; examine and explain alternatives*). **Students monitor their thinking to ensure learning; seek knowledge about how they learn new concepts, facts, and procedures; gain control in directing their solution process.** (5f)	Students use complex reasoning for **more than one sub-objective** during the lesson to make new meaning not provided by the teacher (*e.g., apply a concept in a new context; develop a plan or sequence of steps; select or devise an approach to research a problem; recognize and explain misconceptions; propose and evaluate solutions to problems; draw conclusions; make connections across time and place to explain a concept or big idea; develop generalizations*). (5f)	Students **use complex reasoning to make new meaning not provided by the teacher** (*e.g., apply a concept in a new context; develop a plan or sequence of steps; select or devise an approach to research a problem; recognize and explain misconceptions; propose and evaluate solutions to problems; draw conclusions; make connections across time and place to explain a concept or big idea*). (5f)	Students **use information or conceptual knowledge to demonstrate comprehension** of content (*e.g., summarize essential points; express learning in a graph or non-linguistic representation; explain cause-effect relationship; categorize; infer*).	Students demonstrate recall of fact(s), information, or procedure(s).	

LEARNING-COMMUNITY-RUBRIC-

Aligns-with-InCTASC-Standard-3-(Learning-Environments)

The *Learning Community* rubric is designed to support teachers with establishment of a classroom learning environment that enhances individual and collaborative learning, and that encourages positive social interaction, active engagement in learning, and self-motivation. The learning environment must motivate student learning through establishing interest, providing choices, making relevant connections, building understanding, assessing learning outcomes, developing close teacher-learner relationships, and creating a sense of belonging between and among learners. The teacher collaborates with learners to develop shared values and expectations for respectful interactions, rigorous academic discussions, and individual and group responsibility for quality work.

Element	5	4	3 Proficient	2	1	0
	Meets criteria at levels 3, 4, and 5.	**Meets criteria at levels 3 and 4.**	-	-	-	-
	Descriptors					
Routines & Procedures Pre-Conf. / Observation / Post-Conf.	**Students support each other** in consistently and effectively applying the routines and procedures **as members of a highly functioning learning community.** (3c, 3d)	Routines and procedures are **effectively and consistently utilized and internalized by students** to maximize instructional time. (3d)	**Supports students in utilizing routines and procedures to maximize instructional time.** (3a, 3d, 3f)	Implements routines and procedures to enable the classroom to run more smoothly. (3f)	Re-directs students to follow routines and procedures. (3f)	!
Responsibility for Learning Pre-Conf. / Observation / Post-Conf.	**Students are self-directed** learners who assume responsibility for productivity and maintain momentum without continuous monitoring. **Students use exemplary anchor papers, rubrics and/or other exemplary student work to evaluate their work and the work of others.** (3a, 3c, 3e)	**Collaborates with students** to develop shared values and expectations for respectful interactions, rigorous academic discussions, and individual and group responsibility for quality work. (3a, 3c, 3e)	**Conveys high expectations** for learning using **one or more** of the following strategies: - Focuses students on their academic and/or social goals. - Prompts students to monitor their own work habits and take initiative. - Encourages students to use strengths as a basis for growth and their misconceptions as opportunities for learning. (3e)	**Conveys high expectations** for student work and behavior through statements of lesson objective expectations, references to criteria for quality, **and/or** asking students to share with one another what is expected.	Assigns work to students and addresses misbehavior.	!

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Element	5	4	3 Proficient	2	1	0
	Meets criteria at levels 3, 4, and 5.	Meets criteria at levels 3 and 4.	.	.	.	.
	Descriptors					
Monitoring and Responding to Student Behavior Pre-Conf. / Observation / Post-Conf.	**Students proactively sustain a positive learning environment** so that nearly all necessary adjustments to behavior are student initiated.	**Prompts students to develop and use self-monitoring skills** to maintain a positive and productive learning environment. (3a, 3e)	**Uses verbal and non-verbal cues in ways that demonstrate respect, and conveys the reason for the appropriate behavior in order to develop a collaborative community.** (3c, 3f) If needed, provides prompt intervention in a respectful and effective manner when a student(s) does not meet community **and/or** performance expectations.	Uses strategies to effectively monitor and respond to student behavior. If needed, respectfully responds to student(s) who do not meet community **and/or** performance expectations.	Uses strategies to monitor student behavior and responds to disrespectful or off task behavior.	!
Relationships Pre-Conf. / Observation / Post-Conf.	**Students facilitate and demonstrate positive interactions with their peers** in ways that demonstrate respect for and responsiveness to cultural backgrounds and/or differing perspectives.	**Demonstrates personal knowledge of individual students' lives, interests, and/or preferences.**	Facilitates and demonstrates polite and respectful verbal and non-verbal student-to-student and teacher-to-student interactions **in ways that demonstrate respect for and responsiveness to the cultural backgrounds and/or differing perspectives students bring to the learning environment.**	Facilitates polite and respectful teacher-to-student and student-to-student interactions.	Listens and observes in a thoughtful and responsive manner.	

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PROFESSIONAL-RESPONSIBILITIES-RUBRIC-

Aligns-with-InCTASC-Standard-9-(Professional-Learning-&-Ethical-Practice)-and-10:-(Leadership-&-Collaboration)

The *Professional Responsibilities* rubric is designed to identify appropriate professional responsibilities in the context of the other rubrics embedded in the Learning Observation Instrument. The effective teacher engages in ongoing professional learning and uses evidence to continually evaluate his/her practice, particularly the effects of his/her choices and actions on others (learners, families, other professionals, and the community), and adapts practice to meet the needs of each learner. The effective teacher seeks appropriate leadership roles and opportunities to take responsibility for student learning, to collaborate with learners, families, colleagues, other school professionals, and community members to ensure learners growth, and to advance the profession.

	5	4	3 Proficient	2	1	0
	Meets-criteria-at-levels-3,-4,-and-5.	**Meets-criteria-at-levels-3-and-4.**	-	-	-	-
Element	**Descriptors**					
Engagement-in-Meaningful-and-Appropriate-Professional-Learning-Opportunities	Contributes to the knowledge and skills of others (e.g., models effective practice for colleagues), and leads professional learning activities. 10(f)	Actively seeks out and participates in ongoing professional learning opportunities within and outside the school that **directly** address needs identified through examination of evidence of instructional effectiveness. Actively participates in and contributes meaningfully to required professional learning activities. (9a, 9b)	Seeks out and participates in **ongoing** professional learning opportunities **within-and-outside-the-school-that-generally-address-needs-identified-through-examination-of-evidence-of-instructional-effectiveness.** (9a, 9b)	Attends required professional learning activities. Seeks out and participates in optional professional learning opportunities.	Attends required professional learning activities.	
Collaboration-with-Colleagues	Actively engages with grade level or subject area colleagues **on-an-ongoing-basis** in giving and receiving feedback on instruction, examining student work, analyzing evidence of instructional effectiveness, and sharing responsibility for student learning. (1c, 10a 10b, 10i)	Actively engages **within-and-across** grade level or subject area colleagues in giving and receiving feedback on instruction, examining student work, analyzing evidence of instructional effectiveness, and sharing responsibility for student learning. **Consistently-seeks-opportunities** to share practices and learning with colleagues and to learn from them. (1c, 10a, 10b, 10i)	**Actively-engages** with grade level or subject area colleagues in giving and receiving feedback on instruction, examining student work, analyzing evidence of instructional effectiveness, and sharing responsibility for student learning. **Seeks-opportunities** to share practices and learning with colleagues and to learn from them. Relationships with colleagues are characterized by mutual support, respect, and cooperation. (1c, 10a, 10b, 10i)	Participates with grade level or subject area colleagues in **sharing-responsibility-for-student-learning.** Relationships with colleagues are cordial and respectful.	Participates professionally with grade level or subject area colleagues. Relationships with colleagues are cordial, and respectful.	

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Element	5	4	3 Proficient	2	1	0
	Meets criteria at levels 3, 4, and 5.	Meets criteria at levels 3 and 4.				
	Descriptors					
Engagement with Families	**Actively and authentically involves families** on an **ongoing basis** in setting goals and expectations for individual student learning and development. Establishes mutual expectations for individual students in collaboration with families, and works with them to **mutually develop and monitor** strategies **both at school and at home** to support students in achieving those goals. (10d)	**Actively and regularly involves families** in setting goals and expectations for individual student learning and development. Establishes **mutual expectations** for individual students in collaboration with families, and works with them to develop and monitor strategies at home to support students in achieving those goals. (10d)	**Involves families** in setting goals and expectations for individual student learning and development. Communicates expectations for individual students to families, and **works with them** to develop and monitor strategies at home to support students in achieving those goals. (10d)	Communicates expectations for individual students to families, and **works with them** to develop and monitor strategies at home to support students in achieving those goals.	Communicates expectations for individual students to families.	
Communication with Families	Uses a variety of communication tools and strategies to **regularly and frequently communicate** with families regarding individual student learning and progress. **Seeks regular and frequent information and feedback** from families about students and the instructional program. (10d, 10g)	Uses a **variety of communication tools and strategies** to regularly communicate with families regarding individual student learning and progress. **Seeks information and feedback from families about students and the instructional program.** (10d, 10g)	**Regularly communicates** with families regarding individual student learning and progress. Responds **fully** to families' concerns about students, **and follows up by providing information about progress or changes.** Relationships with families are characterized **by mutual support.** (10d, 10g)	**Communicates** with families regarding individual student learning and progress. **Responds to families' concerns** about students. Relationships with families are cordial and respectful. (10d, 10g)	Provides required information to families. Responds to families' concerns about students. Relationships with families are cordial and respectful. (10d, 10g)	
Leadership	Seeks opportunities and accepts leadership roles at the district, state, or national level and advocates for learners, the school, the community, and the profession. Engages collaboratively in the school-wide effort to build a shared vision and supportive culture, identify common goals, and monitor and **evaluate** progress toward those goals. (10c, 10k)	Seeks opportunities and accepts leadership roles at the district level. Engages collaboratively in the school-wide effort to build a shared vision and supportive culture, identify common goals, and monitor progress toward those goals. (10c, 10k)	Seeks opportunities and accepts leadership roles within the school. Actively supports the school's shared vision and common goals. Contributes to improvement efforts within the school. (10c, 10k)	Participates in leadership opportunities when asked. (10k)	Understands and supports the school's shared vision and common goals. (10c)	

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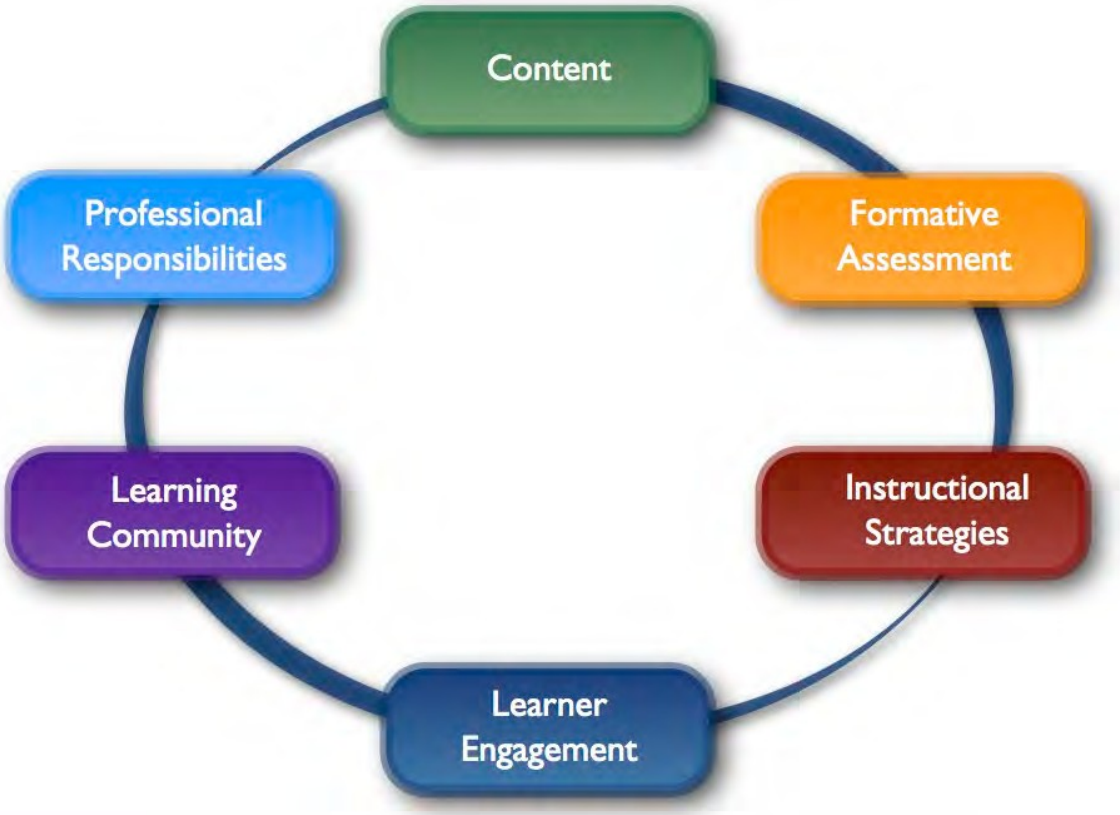

Special(Education(Overlay(

Learning Observation Instrument

MCESA
Maricopa County Education Service Agency

REIL

Rewarding Excellence in Instruction & Leadership
Learning Observation Instrument classroom teachers

CONTENT RUBRIC

Aligns with In-TASC Standard 2 (Learning Differences), 4 (Content Knowledge), 5 (Application of Content), 7 (Planning for Instruction), and 8 (Instructional Strategies)

The *Content* rubric is designed to support teacher understanding and implementation of effective learning experiences that make content accessible and meaningful for learners to assure mastery of the content. These experiences are facilitated through teacher understanding of how to connect concepts and use differing perspectives to engage learners in critical thinking, creativity, and collaborative problem solving related to authentic local and global issues.

	5	4	3 Proficient	2	1	0
	Meets criteria at levels 3, 4, and 5.	Meets criteria at levels 3 and 4.				
Element	**Descriptors**					
Conceptual Understanding	**Guides all students to create or select their own representations and explanations of concepts;** ensures students demonstrate understanding of concepts through multiple ways/examples. Utilizes questions at essential sub-objectives with increasing complexity or depth of content **that are differentiated according to student cognitive level.** (2a, 2c, 4a, 8i)	Utilizes **effective** representations and explanations of concepts **throughout the lesson** that capture key ideas and details that build conceptual understanding in the discipline; prompts students to demonstrate understanding of concepts through multiple ways/examples. Utilizes questions at essential sub-objectives **with increasing complexity or depth of content**; surfaces learner misconceptions that may interfere with learning. (2a, 4a, 4e, 8i)	Utilizes representations and explanations of concepts (*e.g., comparisons, analogies, examples, TPR, realia, manipulatives, anchor charts, graphic organizers*) that capture **key ideas and details** that build **conceptual** understanding in the discipline. Utilizes questions **at essential sub-objectives** that support student understanding in the discipline and stimulate discussion for a specific purpose (*e.g., probing for learner understanding, helping learners articulate their ideas and thinking processes, encouraging students to question and analyze ideas from diverse perspectives*). (4a, 4b, 8i)	Utilizes representations **and** explanations of concepts that capture **key ideas** essential to build understanding of the lesson outcome. Utilizes questions within the lesson to probe for learner understanding related to the lesson outcome. (4a, 8i)	Utilizes representations and/or explanations of concepts that capture some key ideas to build understanding of the lesson outcome. Utilizes questions within the lesson to stimulate discussion. (4a, 8i)	
Pre-Conf. **Observation** **Post-Conf.**						

1

Element(	5(	4(	3(Proficient(	2(	1(	0(
	Meets(criteria(at(levels(3,(4,(and(5.(	Meets(criteria(at(levels(3(and(4.(	(	(	(	(
	Descriptors					
Task(Analysis((Pre(Conf.(Observation(Post(Conf.(	Planned/Taught lesson objective(s), sub-objective(s), & materials are logically organized/sequenced in relation to the lesson, unit, and **year-long(plan.** (7c)	Planned/Taught lesson objective(s), sub-objective(s), & materials **anticipate(possible(student(misconceptions(**and are(logically organized/ sequenced in relation to lesson and(**unit.(** (4f, 7b, 7c)	Planned/Taught lesson objective(s), **sub-objective**(s), & materials are aligned to content standards, **segmented(for(learning,(reflect(prior(learning,(and(are(logically(organized/(sequenced(in(relation(to(the(lesson.** (4d, 4f, 7b, 7c)(	Planned/Taught lesson objective(s) and materials are **sequenced** and aligned to content standards. (7b, 7c)	Planned/Taught lesson objective(s) & materials are sequenced. (7b, 7c)	
Connections(to(Content((Pre(Conf. Observation(Post(Conf.)	Engages **students(in(applying interdisciplinary** content knowledge to a real-world question, problem, issue, or event **through(the(lens(of(local(and/or(global(issue(s).** (4b, 5b, 5d, 5g)	Engages **students(in(applying disciplinary** content knowledge to a **real-world(question,(problem,(issue,(or(event.** (4b)	**Prompts(student reflection** of prior content knowledge, linking new concepts to familiar concepts, makes connections to students' experiences. (2d, 4d)	Activates students' **prior(knowledge,** makes connections to students' experiences to enhance understanding of the content. (2d, 4d)	Makes connections to students' experiences to enhance understanding of the content.	
Content(Accessibility((Pre(Conf.(Observation(Post(Conf.)	Discusses"plan"for"making" content"accessible"for"all" students"at"the"**individual(student(level**"by"identifying"and" sharing"materials/strategies"for" verbal"&"instructional"scaffolding" (*e.g.,%building%background;% paraphrasing;%adapting%materials;% modifying%tasks,%problems,%complexity% of%text;%and/or%vocabulary*)." "" Provides"evidence"that"multiple" sources"of"data"were"used"in" planning"for"content"accessibility," **including(relevant(literacy(performance(data(for(each(student**,"IEPs,"ILLPs,"and"relevant" assessment"data"(*e.g.,%formative% assessments*)." (2a,"2e,"4f,"5h)" "	Discusses"plan"for"making" content"accessible"for"all" students"at"the"**sub-group(level**" by"identifying"and"sharing" materials/strategies"for"verbal"&" instructional"scaffolding"(*e.g.,% building%background;%paraphrasing;% adapting%materials;%modifying%tasks,% problems,%complexity%of%text;%and/or% vocabulary*)." (2a,"2e,"4f,"5h)" " "	Discusses"plan"for"making"content" accessible"for"all"students"at"the"**sub-objective(level**"by"identifying"and" sharing"materials/strategies"for" verbal"&"instructional"scaffolding" (*e.g.,%building%background;%paraphrasing;% adapting%materials;%modifying%tasks,% problems,%complexity%of%text;%and/or% vocabulary*)." "Provides"evidence"that"appropriate" data"was"used"in"planning"for" content"accessibility,"**including(IEPs,(ILLPs,(and(relevant(assessment(data"** (***e.g.,%formative%assessments***)."** (2a,"2e,"4f,"5h)"	Discusses"plan"for" making"content" accessible"for"students" by"identifying"and" sharing"materials"**and**" strategies"for"verbal"or" instructional" scaffolding"(*e.g.,% building%background;% paraphrasing;%modifying% tasks,%problems,% complexity%of%text;% and/or%vocabulary*)." "" Provides"evidence"that" data"was"used"in" planning"for"content" accessibility"for"**at(least(one(subgroup(of(students.(** (2a,"2e,"4f)"	Discusses"plan"for" making"content" accessible"for"students" by"identifying"and" sharing"materials"or" strategies"for"verbal"or" instructional" scaffolding"(*e.g.,% building%background;% paraphrasing;%modifying% tasks,%problems,% complexity%of%text;% and/or%vocabulary*)." "Provides"evidence"that" data"was"used"in" planning"for"content" accessibility"for"**at(least(one(student.(** (2a,"2e,"4f)"	"
2" "	"		"	"	"	"

FORMATIVE(ASSESSMENT(RUBRIC(

Aligns(with(InDTASC(Standard(1((Learner(Development),(6((Assessment),(7(((Planning(for(Instruction),(and(8((Instructional(Strategies)(

The*Formative&Assessment*rubric is designed to support teacher understanding and implementation of real Time (during & end A of A lesson) assessment as a strategy to monitor learner progress and to guide ongoing planning and instruction. Effective teachers use real Time assessments that are at the correct level of difficulty, aligned to standards A based objectives, and engage learners in demonstrating knowledge and skills. In addition, the effective teacher articulates & documents progress that learners have made in relation to the observed lesson objective.(

Element(	5(	4(	3(Proficient(	2(	1(	0(
	Meets(criteria(at(levels(3,(4,(and(5.(	**Meets(criteria(at(levels(3(and(4.(**	(	(	(	(
	Descriptors(					
RealDTime((during&endA ofAlesson)(**Assessment(** PreDConf.(Observation Post(DConf.	Plans appropriate during and endAofAlesson assessment(s) that are designed to elicit the information necessary throughout the lesson in order to adjust instruction at the **individual(student(level.** (1a,6a,6b,7d,8b)	Plans appropriate during and endAofAlesson assessment(s) that are designed to elicit the information necessary **throughout the(lesson** in order to adjust instruction at **the(subD group(level.** (1a,6a,6b,7d,8b)	**Plans(appropriate(during(and(endD ofDlesson(assessment(s)**(*e.g.,(student(recording,(artifacts,(monitoring(notes,(verbal(response*)aligned to the lesson objectives that are designed to elicit the information necessary to adjust instruction at the **subDobjective(level.** (1a,6a,6b,7d,8b)	Plans real Time assessment(s) **aligned(to(the(lesson(objective,** that are designed to elicit overt responses from students **multiple(times** during the lesson.((6a,6b)	Plans real Time assessment(s) designed to elicit an overt response from students. (6a)	
Student(Progress(((PreDConf.(Observation(Post(DConf.	Articulates and presents evidence of student progress, relative to rigorous short Term (*e.g.,(unit,(series&of(lessons*) and long Term (*e.g.,(endBofByear*) goals in order to guide planning. Presents evidence that **nearly(all(students(95(D100%)**(met the lesson objective. (6c,6g,8b)	Articulates and presents evidence of student progress, relative to **rigorous(short Dterm((e.g.,(unit,(series(of(lessons)** and **longDterm(e.g.,(endDofDyear)** goals in order to guide planning. Presents evidence that **most(of(the(students(75D94%)(met(the(lesson(objective.(** (6c,6g,7f,8b)	Articulates and presents evidence of student progress to guide planning. Presents evidence that **nearly(all(students(95D100%)**(demonstrate progress (*growth*) **relative(to(the(lesson(objective.** (6c)	Articulates student progress; **75%(D94%(** of students demonstrate progress (*growth*).	Articulates student progress; **less(than(75%** of students demonstrate progress (*growth*).	
Correct(Level(of(Difficulty((PreDConf.(Observation(Post(DConf.	Produces evidence that real Time assessments are at the correct level of difficulty (at the(**individual(student(level.(** (6a)	Produces evidence that real Time assessments are at the correct level of difficulty at the(**subDgroup(level.(** (6a)	Produces evidence that real Time assessments are at the correct level of difficulty for more than half of the students, as evidenced by (pre/prior assessment(s)(**and**(student work.((6a)	Produces evidence that real Time assessments are at the correct level of difficulty **for(more(than(half** of the students, **as(evidenced(by(pre/prior(assessment(s)(or(student(work.(** (6a)	Produces evidence that real Time assessment(s) are at the correct level of difficulty **for(less(than(half**(of the students. (6a)	

3" " " " " " " "

INSTRUCTIONAL(STRATEGIES(RUBRIC(

Aligns(with(InDTASC(Standard(2((Learning(Differences),(3((Learning(Environment),(6((Assessment),(7((Planning(for(Instruction),(and(8((Instructional(Strategies)(

The*Instructional&Strategies*rubricisfocusedonspecificinstructionalstrategiesthatteachersutilizetoensurelearnersdevelopdeepunderstandingofcontentareasandtheir connections,andtobuildskillstoapplyknowledgeinmeaningfulways.The teachervarieshis/hersroleintheinstructionalprocess(e.g.,instructor,facilitator,coach,audience)in relationtothecontentandpurposesofinstructionandtheneedsoflearners.

Element(			5(	4(	3(Proficient(	2(	1(	0(
			Meets(criteria(at(levels(3,(4,(and(5.(	**Meets(criteria(at(levels(3(and(4.(**	(	(	(	(
			Descriptors(					
Teacher(Role(			Varies teacher role (*e.g., teacher-led, facilitation of student learning*) effectively and consistently in relation to content and purpose of instruction, **and the (needs (of individual (learners.** (8d)	Varies teacher role (*e.g., teacher-led, facilitation of student learning*) effectively and **(consistently** in relation to content and purpose of instruction, **and (the (needs (of (sub-groups (of (learners.** (8d)	Varies teacher role (*e.g., teacher-led, facilitation of student learning*) **effectively** during the instructional process **in (relation (to (content (and (purpose (of (instruction.** (8d)	Varies teacher role (*e.g., teacher-led, facilitation of student learning*) during the instructional process **to (support (learning (outcome(s).** (8d)	Varies teacher role (*e.g., teacher-led, facilitation of student learning*) during the instructional process. (8d)	" "
Pre-Conf.	**Observation(**	**Post-Conf.**						
Instructional(Approach(			Explicitly models an exemplary product/performance, **free (of (distractions**, by labeling steps or concepts, with precise academic vocabulary and clear articulation of meta-cognition. **AND/OR(** Presents problems/situations and allows open-ended processing of thinking or experimentation; **uses (precise (academic (vocabulary (while (eliciting (student (predictions (or (conjectures (about (content, (and (supporting (students (in (justifying (their (ideas.** (6f, 8d, 8e, 8f, 8i)	Explicitly models an exemplary product/procedure/performance by labeling steps or concepts with precise academic vocabulary and **clear (articulation (of (meta-cognition.** **AND/OR(** Presents problem/situation and allows open-ended processing of thinking or experimentation; **uses (precise (academic (vocabulary** (while clarifying their understandings/ **misunderstandings, (developing (explanations, (and (communicating (ideas.** (6f, 8d, 8e, 8f, 8i)	**Explicitly** models an exemplary product/procedure/performance by labeling steps or concepts **(with (precise (academic (vocabulary.** Supports students, at **essential (sub-objectives** in using clear academic vocabulary/labels (*verbal, written, or non-linguistic representation*) **"to (solidify (learning.** **AND/OR(** Presents problem/situation and allows open-ended processing of thinking or experimentation; **uses (precise (academic (vocabulary (while (clarifying (understandings.** ((Supports students at **essential (sub-objectives (in (using (clear (academic (vocabulary/labels** (*verbal, written, or non-linguistic representation*) **"to (solidify (learning. (** (8d, 8e, 8f, 8i) "	**Models** a task/performance by labeling the steps/criteria. **AND/OR(** Presents problem/situation to **allow (open-ended (processing (of (thinking (or (experimentation.** (8d, 8e)	Provides clear directions for a procedure or shows an example of a product or performance. **AND/OR(** Presents problem/situation with discussion. (8d)	"
Pre-Conf.	**Observation(**	**Post-Conf.**						
4" "				"		" " " " "		

Element(	5(	4(	3(Proficient(	2(	1(	0(
	Meets(criteria(at(levels(3,(4,(and(5.(	Meets(criteria(at(levels(3(and(4.(	(	(	(	(
	Descriptors(					
Practice/(Aligned(Activity((((Pre(Conf.(Observation(Post(Conf.(	Engages(all(students(in(examining(their(own(thinking(**and/or**(learning;(**students(effectively(provide(support(for(one(another.(** (3b,(6f)(	Provides(sufficient,(aligned(practice(or(conceptual(development(activity(**aligned(to(appropriate(sub(objective(s).** **Effectively**(provides(scaffolding(for(students(**who(need(assistance(and(appropriately(fades(away(or(renews(support(as(needed(to(ensure(all(students**(are(challenged(to(move(toward(independence.((2b)(	Provides(**sufficient,(aligned(practice(or(conceptual(development(activity(** to(support(**successful(learning**(of(the(lesson(objective.(Actively(guides(and(scaffolds(individual(students(as(they(practice(the(objectives(and(move(toward(independence(*(e.g.,(referencing(posted(steps,(anchor(charts,(graphic(organizers(or(templates,(coaching,(questioning,(prompting,(cueing*).((2a)(	Provides(opportunity(for(students(to(practice(the(lesson(objective(before(independent(practice(is(assigned;(**or**(provides(opportunity(during(the(conceptual(development(activity(for(students(to(work(toward(mastery(of(the(lesson(objective.(	Provides(independent(practice(or(conceptual(development(activity.(	"
Feedback((during(the(lesson)((Pre(Conf.(Observation(Post(Conf.(	**Prompts(all(students(to(utilize(tools((*e.g.,(checklists,(rubrics,(exemplars,(questions*)(to(assess(their(own(understanding(and(generate(feedback(in(order(to(advance(their(own(learning.(** (6d)"	Provides(academic(feedback,(**with(precise(labels,**(that(is(**specific(to(the(needs(of(the(learner.**((6d)("	Provides(academic(feedback(in(order(to(promote(learning(and(retention(that:(**(1)(is(aligned(at(the(sub(objective(level;((2)(references(a(specific(level(of(skill(or(knowledge,(and((3)(is(timely.**((6d)(	Provides(academic(feedback(that(is(**aligned(to(the(objective.**((6d)(	Provides(academic(feedback(during(the(lesson.((6d)(	"

5" " " " " " " " "

Element(	5(	4(	3(Proficient(	2(	1(	0(
	Meets(criteria(at(levels(3,(4,(and(5.(	Meets(criteria(at(levels(3(and(4.(	(	(	(	(
	Descriptors(					
Monitor(and(Adjust((use(of(real(time(assessment)(Pre(Conf.(Observation(Post(Conf.(	Checks(for(understanding(by(eliciting(overt(responses(from(all(students(at(essential(sub(objective(levels.((Utilizes(student(responses(to(appropriately(move(forward(with(or(adjust(one(or(more(of(the(following(at(the(**individual(level**:(• Instructional"approach"(*e.g.,"pacing,"modeling,"questioning,"guided"practice,"feedback,"etc.*)" • Content"subJskills"or" complexity"(*e.g."number"in"problem"or"Lexile*)" • Depth"of"knowledge" • Grouping" • Task/Product"requirements" (2b,(8a,(8b)(	Checks(for(understanding(by(eliciting(overt(responses(from(**all(students**(at(essential(sub(objective(levels.((Utilizes(student(responses(to(appropriately(move(forward(with(or(adjust(one(or(more(of(the(following(at(the(**sub(group(level:**(• Instructional"approach"(*e.g.,"pacing,"modeling,"questioning,"guided"practice,"feedback,"etc.*)" • Content"subJskills"or" complexity"(*e.g."number"in"problem"or"Lexile*)" • Depth"of"knowledge" • Grouping" • Task/Product"requirements" (2b,(8a,(8b)(((	Checks(for(understanding(by(eliciting(overt(responses(**from(most(students((75%(or(more)**(at(**essential(sub((objective(levels**.((**Utilizes(student(responses(to(appropriately**(move(forward(with(or(adjust(**one(or(more**(of(the(following(:(• Instructional"approach"(*e.g.,"pacing,"modeling,"questioning,"guided"practice,"feedback,"etc.*)" • Content"subJskills"or"complexity" (*e.g."number"in"problem"or"Lexile*)" • Depth"of"knowledge" • Grouping" • Task/Product"requirements" (8a,(8b)" (	Elicits(overt(responses(from(**at(least(half((50%)**(of(the(students(to(either(move(forward(with(or(adjust(instruction.((8a,(8b)((	Elicits(overt(responses(from(a(few(of(the(students(to(either(move(forward(with(or(adjust(instruction.((8a,(8b)((	"
Analysis(of(Instruction((Pre(Conf.(Observation(Post(Conf.(	Articulates(how(the(results(of(this(lesson(**fit(into(the(long(range(planning**(for(the(content(discipline,(and(identifies(effective(steps(for(increasing(student(learning(**at(the(individual(student(level**(for(the(next(lesson.((7f)(	**Articulates(how(the(results(of(this(lesson(fit(into(the(content(discipline**(and(identifies(effective(steps(for(increasing(student(learning(**at(the(sub(group(level**(for(the(next(lesson.((7f)((	Accurately(identifies(strengths(and/(or(weaknesses(of(the(lesson/instruction,(based(on(analysis(of(student(work/results,(**and(identifies(effective(steps(for(increasing(student(learning(for(the(next(lesson**.((7f)((((	**Accurately**(identifies(strengths(and/or(weaknesses(of(the(lesson/instruction,(**based(on(analysis(of(student(work/results**.(((7f)((	Identifies(strengths(and/or(weaknesses(of(the(lesson/instruction.((	"

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6" "

LEARNER(ENGAGEMENT(RUBRIC(

Aligns(with(InDTASC(Standard(2((Learning(Differences),(3((Learning(Environments),(4((Content(Knowledge),((5((Application(of(Content),6((Assessment),(7((Planning(for(Instruction),(and(8((Instructional(Strategies)(

The(*Learner(Engagement(*rubric(is(designed(to(support(teachers(with(establishment(of(classroom(environments(that(support(authentic(engagement(in(learning.(The(effective(teacher(understands(the(relationship(between(motivation(and(engagement(and(knows(how(to(design(learning(experiences(using(strategies(that(build(learner(selfAdirection(and(ownership(of(learning.(The(teacher(collaborates(with(learners(to(develop(shared(values(and(expectations(for(rigorous(academic(discussions,(and(individual(and(group(responsibility(for(quality(work.(Engagement(is(both(studentAtoAstudent(and(teacherAtoAstudent,(and(is(grounded(in(development(of(critical(thinking(skills(focused(on(content(specific(process(skills.(This(facilitates(authentic(engagement(where(students(are(not(just(compliant,(but(can(see(a(connection(between(the(assigned(task(and(the(results/outcomes,(and(that(there(is(clear(meaning(and(personal(relevance.(

	5(	4(	3(Proficient(	2(	1(	0(
	Meets(criteria(at(levels(3,(4,(and(5.(	**Meets(criteria(at(levels(3(and(4.(**	(	(	(	(
Element(	**Descriptors(**					
StudentDtoD Student(Interaction((((**Pre(DConf.(Observation(Post(DConf.(**	**Students(respond(to(shifts(in(conversation(as(they(explore(the(topic,(different(students(may(emerge(as(experts(***(e.g.,(appropriately(adjusts(within(the(context,(draws(on(multiple(and/or(diverse&perspectives,(challenges& assumptions(with&justification(and(evidence)***(in(order(to(develop(expressive(language(proficiency(and(demonstrate(deep(or(extended(learning.(* (4b,(4h,(5d,(6f,(8h)((	Students(engage(in(**focused(learning(conversations(to(build(on(other(students'(thoughts/ideas/writing/nonD linguistic(representation(***(e.g.,(questioning,(piggybacking,(summarizing,(clarifying,(paraphrasing)***,(in(order(to(develop(expressive(language(proficiency(and(**demonstrate(deep(or(extended(learning.**(((4h,(5d,(6f,(8h)((	Students(engage(in(structured,(**scaffolded**(studentAtoAstudent(academic(dialogue(aligned(to(the(lesson(objective(in(order(to(**develop(expressive(language(proficiency(and(solidify(learning.**((Students(demonstrate(individual(accountability,(**equal(participation,(application(of(content(vocabulary,(and(justification(of(ideas.(** (4h,(8h)((	Students(engage(in(**structured,**(studentA toAstudent(academic(dialogue(***(e.g.,(reporting,(sharing,(clarifying)***,(aligned(to(the(lesson(objective.((Students(demonstrate(**individual(accountability(and(use(of(content(vocabulary.**((4h,(8h)(	Students(engage(in(studentAtoAstudent(academic(dialogue(***(e.g.,(reporting,(sharing,(clarifying)***.((4h,(8h)((	(
TeacherDtoD Student(Interaction((((**Pre(DConf.(Observation(Post(DConf.(**	Elicits(participation(from(**all(students(consistently**(throughout(the(lesson(for(**each(** subAobjective.(((Students(hold(one(another(accountable(for(engagement(in(activities(and(responses.(3c)((((((	Elicits(participation(from(**nearly(all((95%D100%)**(students(for(**most**(subAobjectives,(**through(a(systematic(progression(of(purposeful(questions(and(a(variety(of(activities.**(((8i)(((	Elicits(participation(from(**most((85%D 94%)**(of(the(students(at(significant(points(during(the(lesson,(through(**purposeful(questioning(and/or(activities**(***(e.g.,(speak,(write,(signal,(perform,(think)***(requires(students(to(engage(in(covert(***(internal)***(thinking(and(provides(sufficient(wait(time(before(calling(on(individual(students.((**Adjusts(level(of(concern(to(promote(mandatory(participation(through(time(limits,(calling(on(nonD volunteers,(pacing,(proximity,(and/or(performance(checks.(** (8i)"	Elicits(participation(from(**more(than(half** of(the(students(during(parts(of(the(lesson,(through(questioning(and/or(activities(***(e.g.,(speak,(write,(signal,(perform,(think)***.((**Utilizes(questioning(strategies(that(require(covert((*internal*)(thinking(and(sufficient(wait(time(before(calling(on(individual(students.**(((8i)(	Elicits(participation(from(**less(than(half**(of(the(students,(during(parts(of(the(lesson,(through(questioning(and/or(activities.(((8i)((((	(

7" " " " " " " " "

Element(	5(	4(	3(Proficient(	2(	1(	0(
	Meets(criteria(at(levels(3,(4,(and(5.(	Meets(criteria(at(levels(3(and(4.(	(	(	(	(
	Descriptors(					
Authentic(Engagement(((**Pre(0Conf.(Observation(Post(0Conf.:**	Facilitates:authentic: engagement:by:: **(1)(Involving(all(students(in(generating(and(evaluating(new(ideas(and(novel(approaches,(seeking(inventive(solutions(to(problems,(and(developing(original(work;(and((2)(Collaborates(with(all(students(to(design(and(implement(relevant(learning(experiences.(** (2a,:3b,:5f,:5g,:7a,:8c,:8i): : :	Facilitates:authentic: engagement:by:assigning(**differentiated,(meaningful(tasks(that(require(complex(thinking,**:that:most::students: associate:with:a:result:or: outcome:that:has:clear:meaning: and:personal:relevance.: (2a,:7a,:8c,:8i): : : : :	Facilitates:authentic:engagement:by: assigning:tasks:that:**most(students:** associate:with:a:result:or:outcome: that:has:clear:meaning:**and:personal(relevance:**(*connects:task(s):to:learning: outcome:relative:to:big:idea;:purpose:for: learning*).: (7a,:8c,:8i): :	Assigns:tasks:that: **some(students(associate(with(a(result(or(outcome(that(has:clear(meaning.**: : : : : :	Assigns:tasks:that: most:students: complete:to:avoid:a: negative: consequence,:or: achieve:an:extrinsic: outcome:(*e.g.,:reading: a:book:in:order:to:pass: a:test*).: : :	:
Critical(Thinking((((((**Pre(0Conf. Observation(Post(0Conf.:**	Students:use:complex:reasoning: **with(planning(over(an:extended(period(of(time(in(connection(with(a(long0term(project,(problem,(performance,(and/or(investigation:**(*e.g.,:process:multiple: conditions:of:a:problem:or:task;:use: multiple:sources:to:gather:and: synthesize:information;:examine:and: explain:alternatives*).: **:Students(monitor(their(thinking(to(ensure(learning;(seek(knowledge(about(how(they(learn(new(concepts,(facts,(and(procedures;(gain(control(in(directing(their(solution(process.(((** (5f): : : : : : : :	Students:use:complex: reasoning:for:**more(than(one(sub0objective(**during:the:lesson: to:make:new:meaning:not: provided:by:the:teacher:(*e.g.,: apply:a:concept:in:a:new:context;: develop:a:plan:or:sequence: of:steps;:selection:devise:an:approach:to: research:a:problem;:recognize:and: explain:misconceptions;:propose:and: evaluate:solutions:to:problems;:draw: conclusions;:make:connections:across: time:and:place:to:explain:a:concept: or:big:idea;:develop:generalizations*).: :(5f): :	Students:**use(complex(reasoning(to(make(new(meaning(not(provided(by(the(teacher:**(*e.g.,:apply:a:concept:in: a:new:context;:develop:a:plan:or:sequence: of:steps;:selection:devise:an:approach:to: research:a:problem;:recognize:and:explain: misconceptions;:propose:and:evaluate: solutions:to:problems;:draw:conclusions;: make:connections:across:time:and:place:to: explain:a:concept:or:big:idea*).: (5f): : : : : :	Students:**use(information(or: conceptual(knowledge(to(demonstrate(comprehension(**of: contents:(*e.g.,:summarize: essential:points;:express: learning:in:a:graph:or: nonblinguistic: representation;:explain: cause:effect:relationship;: categorize;:infer*).: : : : :	Students:demonstrate: recall:of:fact(s),: information,:or: procedure(s).: : : : :	:
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LEARNING COMMUNITY RUBRIC

Aligns with InTASC Standard 3 (Learning Environments)

The *Learning Community* rubric is designed to support teachers with establishment of a classroom learning environment that enhances individual and collaborative learning, and that encourages positive social interaction, active engagement in learning, and self-motivation. The learning environment must motivate student learning through establishing interest, providing choices, making relevant connections, building understanding, assessing learning outcomes, developing close teacher-learner relationships, and creating a sense of belonging between and among learners. The teacher collaborates with learners to develop shared values and expectations for respectful interactions, rigorous academic discussions, and individual and group responsibility for quality work.

Element	5	4	3 Proficient	2	1	0
	Meets criteria at levels 3, 4, and 5.	**Meets criteria at levels 3 and 4.**				
	Descriptors					
Routines & Procedures Pre-Conf. / Observation / Post-Conf.	**Students support each other** in consistently and effectively applying the routines and procedures **as members of a highly functioning learning community.** (3c, 3d)	Routines and procedures are **effectively and consistently utilized and internalized by students** to maximize instructional time. (3d)	**Supports students in utilizing routines and procedures to maximize instructional time.** (3a, 3d, 3f)	Implements routines and procedures to enable the classroom to run more smoothly. (3f)	Re-directs students to follow routines and procedures. (3f)	
Responsibility for Learning Pre-Conf. / Observation / Post-Conf.	**Students are self-directed** learners who assume responsibility for productivity and maintain momentum without continuous monitoring. **Students use exemplary anchor papers, rubrics and/or other exemplary student work to evaluate their work and the work of others.** (3a, 3c, 3e)	**Collaborates with students** to develop shared values and expectations for respectful interactions, rigorous academic discussions, and individual and group responsibility for quality work. (3a, 3c, 3e)	**Conveys high expectations** for learning using **one or more** of the following strategies: • Focuses students on their academic and/or social goals. • Prompts students to monitor their own work habits and take initiative. • Encourages students to use strengths as a basis for growth and their misconceptions as opportunities for learning. (3e)	**Conveys high expectations** for student work and behavior through statements of lesson objectives, expectations, references to criteria for quality, **and/or** asking students to share with one another what is expected.	Assigns work to students and addresses misbehavior.	

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Element(	5(	4(	3(Proficient(	2(	1(	0(
	Meets(criteria(at(levels(3,(4,(and(5.(	Meets(criteria(at(levels(3(and(4.(	(	(	(	(
	Descriptors(					
Monitoring(and(Responding(to(Student(Behavior((**Pre(DConf.(** **Observation(** **Post(DConf.;**	**Students(proactively(sustain(a(positive(learning(environment.;** ;so;that;nearly;all;necessary; adjustments;to;behavior;are; studentAinitiated.; ; ;	**Prompts(students(to(develop(and(use(selfDmonitoring(skills;** to;maintain;a;positive;and; productive;learning; environment.;; (3a,;3e); ; ; ;	**Uses(verbal(and(nonDverbal(cues(in(ways(that(demonstrate(respect,(and;conveys(the(reason(for(the(appropriate(behavior;in(order(to(develop(a(collaborative(community.;**(3c,;3f); ;If;needed,;provides;prompt; intervention;in;a;respectful;and; effective;manner;when;a;student(s); does;not;meet;community;**and/or**; performance;expectations.;	Uses;strategies;to; effectively;monitor; and;respond;to; student;behavior.; ;If;needed,;respectfully; responds;to;student(s); who;do;not;meet; community;**and/or**; performance; expectations.; ;	Uses;strategies;to; monitor;student; behavior;and; responds;to; disrespectful;or;off; task;behavior.; .; ;	"
Relationships(; **Pre(DConf.(** **Observation((((((** **Post(DConf.;**	**Students(facilitate(and(demonstrate(positive(interactions(with(their(peers.(** ;in;ways;that;demonstrate;respect; for;and;responsiveness;to;cultural; backgrounds;and/or;differing; perspectives.;;((	**Demonstrates(personal(knowledge;of(individual(students'(lives,(interests,(and/or(preferences.**; (	Facilitates;and;demonstrates;polite; and;respectful;verbal;and;nonAverbal; studentAtoAstudent;and;teacherAtoA students;interactions;**in(ways(that(demonstrate(respect(for(and(responsiveness(to(the;cultural(backgrounds(and/or(differing(perspectives;students(bring(to(the(learning(environment.;;** "	Facilitates;polite;and; respectful;teacherAtoA student;and;studentA toAstudent; interactions.;; "	Listens;and;observes; in;a;thoughtful;and; responsive;manner.; "	

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PROFESSIONAL-RESPONSIBILITIES-RUBRIC-

Aligns-with-InCTASC-Standard-9-(Professional-Learning-&-Ethical-Practice)-and-10:-(Leadership-&-Collaboration)

The *Professional Responsibilities* rubric is designed to identify appropriate professional responsibilities in the context of the other rubrics embedded in the Learning Observation Instrument. The effective teacher engages in ongoing professional learning and uses evidence to continually evaluate his/her practice, particularly the effects of his/her choices and actions on others (learners, families, other professionals, and the community), and adapts practice to meet the needs of each learner. The effective teacher seeks appropriate leadership roles and opportunities to take responsibility for student learning, to collaborate with learners, families, colleagues, other school professionals, and community members to ensure learners growth, and to advance the profession.

	5	4	3 Proficient	2	1	0
	Meets-criteria-at-levels-3,-4,-and-5.	**Meets-criteria-at-levels-3-and-4.**	-	-	-	-
Element	**Descriptors**					
Engagement-in-Meaningful-and-Appropriate-Professional-Learning-Opportunities	Contributes to the knowledge and skills of others (e.g., models effective practice for colleagues), and leads professional learning activities. 10(f)	Actively seeks out and participates in ongoing professional learning opportunities within and outside the school that **directly** address needs identified through examination of evidence of instructional effectiveness. Actively participates in and contributes meaningfully to required professional learning activities. (9a, 9b)	Seeks out and participates in **ongoing** professional learning opportunities **within-and-outside-the-school-that-generally-address-needs-identified-through-examination-of-evidence-of-instructional-effectiveness.** (9a, 9b)	Attends required professional learning activities. Seeks out and participates in optional professional learning opportunities.	Attends required professional learning activities.	
Collaboration-with-Colleagues	Actively engages with grade level or subject area colleagues **on-an-ongoing-basis** in giving and receiving feedback on instruction, examining student work, analyzing evidence of instructional effectiveness, and sharing responsibility for student learning. (1c, 10a 10b, 10i)	Actively engages **within-and-across** grade level or subject area colleagues in giving and receiving feedback on instruction, examining student work, analyzing evidence of instructional effectiveness, and sharing responsibility for student learning. **Consistently-seeks-opportunities** to share practices and learning with colleagues and to learn from them. (1c, 10a, 10b, 10i)	**Actively-engages** with grade level or subject area colleagues in giving and receiving feedback on instruction, examining student work, analyzing evidence of instructional effectiveness, and sharing responsibility for student learning. **Seeks-opportunities** to share practices and learning with colleagues and to learn from them. Relationships with colleagues are characterized by mutual support, respect, and cooperation. (1c, 10a, 10b, 10i)	Participates with grade level or subject area colleagues in **sharing-responsibility-for-student-learning.** Relationships with colleagues are cordial and respectful.	Participates professionally with grade level or subject area colleagues. Relationships with colleagues are cordial, and respectful.	

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Element	5	4	3 Proficient	2	1	0
	Meets criteria at levels 3, 4, and 5.	Meets criteria at levels 3 and 4.	.	.	.	.
	Descriptors					
Engagement with Families	**Actively and authentically involves families** on an **ongoing basis** in setting goals and expectations for individual student learning and development. Establishes mutual expectations for individual students in collaboration with families, and works with them to **mutually develop and monitor** strategies **both at school and at home** to support students in achieving those goals. (10d)	**Actively and regularly involves families** in setting goals and expectations for individual student learning and development. Establishes **mutual expectations** for individual students in collaboration with families, and works with them to develop and monitor strategies at home to support students in achieving those goals. (10d)	**Involves families** in setting goals and expectations for individual student learning and development. Communicates expectations for individual students to families, and **works with them** to develop and monitor strategies at home to support students in achieving those goals. (10d)	Communicates expectations for individual students to families, and **works with them** to develop and monitor strategies at home to support students in achieving those goals. 	Communicates expectations for individual students to families. 	
Communication with Families	Uses a variety of communication tools and strategies to **regularly and frequently communicate** with families regarding individual student learning and progress. **Seeks regular and frequent information and feedback** from families about students and the instructional program. (10d, 10g)	Uses a **variety of communication tools and strategies** to regularly communicate with families regarding individual student learning and progress. **Seeks information and feedback from families about students and the instructional program.** (10d, 10g)	**Regularly communicates** with families regarding individual student learning and progress. Responds **fully** to families' concerns about students, **and follows up by providing information about progress or changes.** Relationships with families are characterized **by mutual support.** (10d, 10g)	**Communicates** with families regarding individual student learning and progress. **Responds to families' concerns** about students. Relationships with families are cordial and respectful. (10d, 10g)	Provides required information to families. Responds to families' concerns about students. Relationships with families are cordial and respectful. (10d, 10g)	
Leadership	Seeks opportunities and accepts leadership roles at the district, state, or national level and advocates for learners, the school, the community, and the profession. Engages collaboratively in the school-wide effort to build a shared vision and supportive culture, identify common goals, and monitor and **evaluate** progress toward those goals. (10c, 10k)	Seeks opportunities and accepts leadership roles at the district level. Engages collaboratively in the school-wide effort to build a shared vision and supportive culture, identify common goals, and monitor progress toward those goals. (10c, 10k)	Seeks opportunities and accepts leadership roles within the school. Actively supports the school's shared vision and common goals. Contributes to improvement efforts within the school. (10c, 10k)	Participates in leadership opportunities when asked. (10k)	Understands and supports the school's shared vision and common goals. (10c)	

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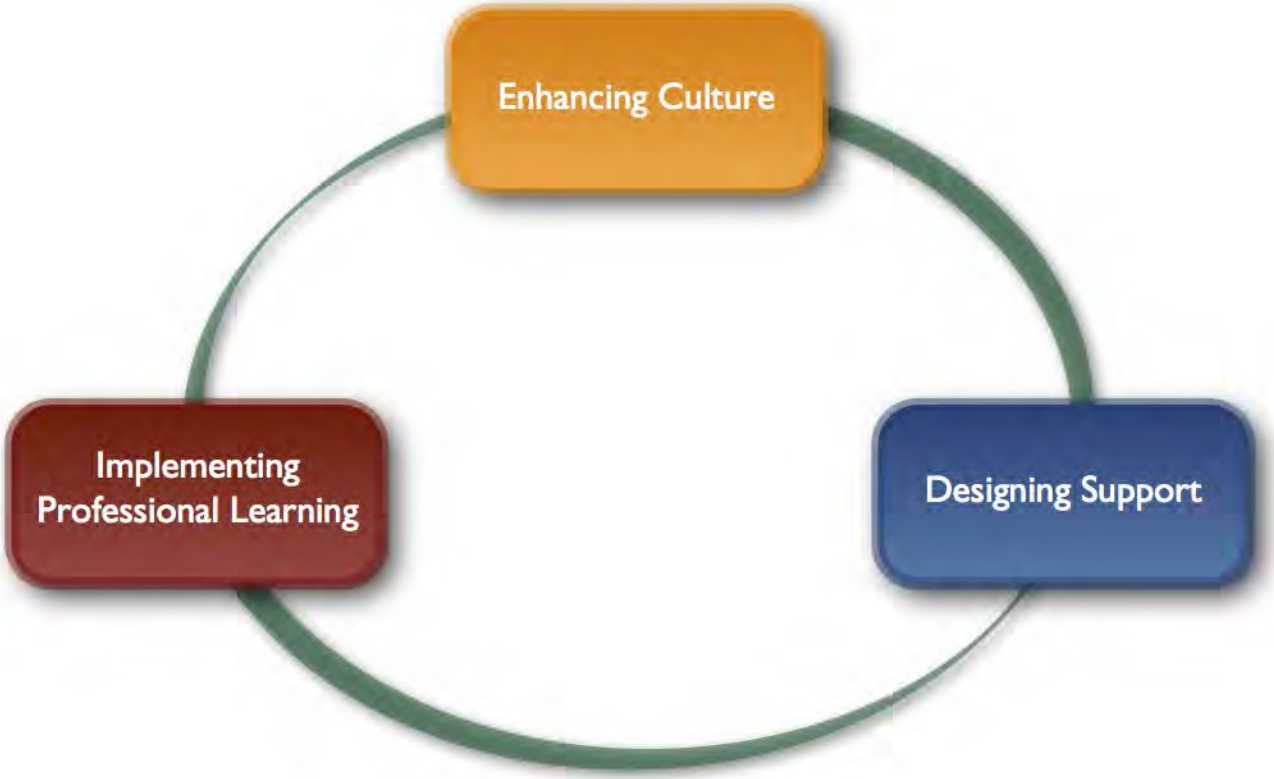

Coaching Observation Instrument

July 2012

MCESA
Maricopa County Education Service Agency

Acknowledgement Page

The *Coaching Observation Instrument* is the result of a collaborative effort to create a cross-district master educator observation tool to be used as part of a performance-based evaluation system. Maricopa County Education Service Agency, along with the five partner districts implementing the federally-funded *Rewarding Excellence in Instruction and Leadership* program, led this comprehensive effort to establish a rigorous, transparent, and fair evaluation system that recognizes excellence and supports the professional growth of master educators serving in instructional coaching roles.

The following people/groups are acknowledged for their contribution in the development and revision of the REIL *Coaching Observation Instrument*:

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In addition, several bodies of work were reviewed to assist in the development process including:

REIL *Learning Observation Instrument* / REIL *Leading Observation Instrument*
In-TASC *Model Core Teaching Standards*, CCSSO
Teacher Leader Model Standards (2012)
Enhancing Professional Practice: A Framework for Teaching (Charlotte Danielson, 2007)
Aspire Public Schools Instructional Coach Performance Criteria
Performance-based Assessment for Literacy Coaches (PALC)
Washington, D.C. Public Schools (DCPS) Instructional Coach Standards Rubric
Adaptive Schools Handbook (Garmston & Wellman, 2009)
The Learning Leader (Reeves, 2006)

ENHANCING CULTURE RUBRIC

The *Enhancing Culture* rubric is designed to support the coach in establishing and maintaining trusting relationships that earn teacher confidence and encourage risk-taking. Through active listening and collaboration, the coach can support teachers with focus and shared commitment on common goals that support the vision, mission, and Continuous Improvement Plan (CIP).

Element	4	3	2	1	0
	Descriptors				
Relationships **Observation Setting** Instructional Delivery / Collaborative Team Meeting / **Instructional Conference** / Leadership Team	**Leverages established relationships to engage in challenging conversations that lead to honest or vulnerable reflection, risk-taking, and changes in teaching and learning.** (O) (S – Teacher) Earns the confidence of teachers and administrators by understanding and demonstrating confidentiality; **teachers regard coach as critical influence on their success.** (O) (S – Teacher)	**Establishes and maintains trusting relationships to promote learning and risk-taking through partnership with teacher and sharing responsibility for challenges.** (O) (S – Teacher) Earns the confidence of teachers and administrators by understanding and demonstrating confidentiality; **teachers value coaching relationship.** (O) (S – Teacher)	**Initiates and nurtures valued professional relationships evidenced by at least three of the following behaviors:** shows care, concern, and empathy for teachers as individuals identifies and validates the teacher's individual strengths, interests, or ideas makes connections to common ideas or interests asks questions to engage the teacher on a personal and professional level. (O) (S – Teacher) Earns the confidence of teachers **and administrators** by understanding and demonstrating confidentiality. (O) (S – Teacher)	Develops cordial and professional relationships with colleagues evidenced by mutual respect, positive interactions, and care for teacher. (O) (S – Teacher) Earns the confidence of teachers by understanding and demonstrating confidentiality. (O) (S – Teacher)	
Active Listening **Observation Setting** Instructional Delivery / **Collaborative Team** / Instructional Conference / Leadership Team	**Facilitates active listening, group acceptance, and learning from dissonant voices and underlying beliefs, and gaining new perspective without personalizing the resistance.** (O)	Actively listens **and analyzes the causes, beliefs, and/or understandings of dissonant voices; and reframes negatives into positives.** (O)	**Actively listens and handles diverse opinions or values in a constructive way without reinforcing barriers.** (O)	Listens attentively and uses influence with others to promote collegiality. (O)	

Element	4	3	2	1	0
	Descriptors				
Collaboration Observation Setting Instructional Delivery / **Collaborative Team Meeting** / Instructional Conference / Leadership Team	**Assigned teachers** develop ideas and products by using the norms of collaboration **with one another** (*see level 2*), **which result in maintained focus, shared commitments, achieved outcome, and continued positive relationships.** (O) (S – Teacher)	Develops ideas and products **by using the norms of collaboration most appropriate for the group or context** (*see level 2*). (O) (S – Teacher)	**Develops ideas and products collaboratively by four or more of the following:** Asking questions to clarify or probe for specificity Paraphrasing, or restating other ideas Pausing to allow other voices and eliciting different perspectives and responses from others Balancing advocacy and inquiry Paying attention to self and others Presuming positive intentions (O) (S – Teacher)	Develops ideas or products by encouraging equal participation. (O) (S – Teacher)	
Goal Orientation Observation Setting Instructional Delivery / **Collaborative Team Meeting** / Instructional Conference / Leadership Team	**Staff frequently references vision, mission, and continuous improvement plan goals and grade-level/department goals in designing and implementing action plans or making decisions.** (O) Holds **self and** assigned teachers to high standards in delivering high-quality learning experiences for students aligned to vision and goals with vertical and horizontal coherence across grade/department teams. (O) Assigned teachers initiate celebrations of measurable student gains and engage in deeper conversations about cause/effect relationship between teaching decisions and student learning. (O)	**Enlists teachers and actively shares responsibility in developing, maintaining, and/or implementing grade-level/department goals that align to continuous improvement plan with advocacy for vision and mission.** (O) **Holds assigned teachers to high standards in delivering high-quality learning experiences for students** aligned to vision and goals **with horizontal coherence across grade/department teams.** (O) Guides sharing celebrations of measurable student gains and **facilitates a deeper conversation about cause/effect relationship between teaching decisions and student learning.** (O)	**Facilitates conversations to confirm and explicitly connect work to vision,** continuous improvement plan, **and** grade-level/department goals. (O) Conveys high expectations (*verbal & written*) for student learning **that are aligned to vision and goals.** (O) **Fosters sharing celebrations of measurable student gains; peers articulate how student gains were achieved.** (O)	References continuous improvement plan or grade-level/department goal to establish purpose. (O) Conveys high expectations (*verbal or written*) for student learning. (O) Identifies individual teacher practices to promote peers learning from one another. (O)	

The *Designing Support* rubric is designed to support the coach in guiding teachers to systematically identify patterns and relationships in data to improve teacher effectiveness and designing systems of coaching support for the teacher to improve short-term and long-term planning and delivery of instruction. By maintaining, monitoring, and adjusting coaching plans the instructional coach can support the achievement of Continuous Improvement Plan goals, Educator Goal Plans, and specific teacher needs based upon pedagogy, content, and student data to ultimately impact improved student achievement.

Element	4	3	2	1	0
	Descriptors				
Students Needs Analysis Observation Setting Instructional Delivery / **Collaborative Team Meeting** / Instructional Conference / Leadership Team	**Teachers use** previous year's summative data and/or recent diagnostic data from several sources aligned to narrowed focus organized for in-depth analysis (*e.g., common formative assessments, student work, behavior logs, progress monitoring tools*). (O) **Teachers use systematic process to identify specific patterns and relationships in the data, conceptions and misconceptions, root causes, and to develop and test hypotheses or generalizations about specific needs of individual students and sub-populations.** (O)	Guides use of previous year summative data and/or recent diagnostic data **from several sources aligned to narrowed focus organized for in-depth analysis** (*e.g., common formative assessments, student work, behavior logs, progress monitoring tools*). (O) **Guides discussion of the evidence of student learning and develops teacher capacity to ask questions of the data linked to specific patterns and relationships, conceptions and misconceptions, and root causes about specific needs of individual students and sub-populations.** (O)	**Guides use of previous year summative and/or recent diagnostic data**. (O) **Engages teachers in a discussion** of the evidence of student learning **to identify achievement strengths and high priority areas for improving student learning.** (O)	Provides data to teacher team. (O) Presents student achievement strengths and weaknesses in student learning data. (O)	
Instructional Analysis Observation Setting Instructional Delivery / **Collaborative Team Meeting** / Instructional Conference / Leadership Team	**Teachers utilize effective protocols to articulate cause/effect relationships** between student learning data, teacher content knowledge, and teacher actions **to accurately identify how to improve their own effectiveness.** (O)	**Guides teachers through a protocol to articulate** relationship between student data, teacher content knowledge, and teacher actions (*i.e. considers factors such as task analysis of the content sub-skills, use of assessment data, personal mastery of specific instructional strategies, choice of instructional strategies to build understanding, learning time, sufficient practice, etc.*). (O)	**Poses questions to engage teachers in the interpretation of the relationship between student data, teacher content knowledge, and teacher actions.** (O)	Offers interpretation of student data to improve teaching and learning. (O)	

Element	4	3	2	1	0
	Descriptors				
Instructional Planning **Observation Setting** Instructional Delivery / **Collaborative Team Mtg** / Instructional Conference / Leadership Team	**Teachers use** in-depth instructional analysis of content, pedagogy, and student learning data to plan high opportunity next steps for short-range and long-range instruction plans and assessment development to meet individual needs. (O)	**Scaffolds teachers in using in-depth instructional analysis of content, pedagogy, and student learning data to identify high opportunity next steps for short-range and long-range instructional plans and assessment development to meet individual needs.** (O)	**Directs teachers in whole group and sub-group short-range and long-range planning (*for initial instruction, re-teaching, interventions, and/or enhancements*) or assessment development based on instructional analysis.** (O)	Plans whole-group or sub-group instructional plans to support teacher. (O)	
Adjusting Support **Observation Setting** Instructional Delivery / Collaborative Team Meeting / Instructional Conference / **Leadership Team**	**Accurately** analyzes student learning data and **in-depth** patterns of teacher progress, **relevant** teacher conceptions/ misconceptions, and **anecdotal information about teacher**. (O) (D – Coaching Plans, Coaching Data Records) Accurately identifies high priority next areas for refinements in content, rigor, **and/or** pedagogical shifts for differentiated teacher groups **and targeted student groups.** (O) (D – Coaching Plan Coaching Data Records s,) **Interprets** the impact of **the type of coaching support and the strategy for delivery (*i.e. frequency, duration, and level of scaffolding*)** on the progress of differentiated groups or individual teachers and makes adjustments to **the type of coaching support and strategies for delivery (*i.e. frequency, duration, level of scaffolding*)** to remove obstacles and improve student achievement. (O) (D – Coaching Plans, Coaching Data Records)	Analyzes student learning data and **patterns** of teacher progress, **teacher conceptions, and teacher misconceptions**. (O) (D – Coaching Plans, Coaching Data Records) **Accurately** identifies **high priority next areas** for refinements in content, rigor, **and/or** pedagogical shifts for differentiated groups. (O) (D – Coaching Plans, Coaching Data Records,) **Interprets the impact of coaching strategies on the progress of differentiated groups or assigned individual teachers and makes adjustments to future coaching to remove obstacles and improve student achievement.** (O) (D – Coaching Plans, Coaching Data Records)	**Collects and analyzes teacher progress monitoring evidence of instructional effectiveness.** (O) (D – Coaching Plans, Coaching Data Records) **Identifies needs for refinements in content, rigor, and/or pedagogical shifts for differentiated groups.** (O) (D – Coaching Plans, Coaching Data Records) **Identifies relationship between professional development efforts and impact on student learning to adjust coaching support for coaching groups**. (*i.e. planning, content or pedagogy training, application/practice in collaborative teams, observation, coaching, checking for understanding*). (O) (D – Coaching Plans, Coaching Data Records)	Maintains records of teacher progress and articulates the progress and potential obstacles of individual teachers. (O) (D – Coaching Plans, Coaching Data Records) Identifies refinements in pedagogical shifts for at least one teacher group. (D – Coaching Plans, Coaching Data Records) Identifies areas of professional development support that need adjustment. (O) (D – Coaching Plans, Coaching Data Records)	

Element	4	3	2	1	0
	Descriptors				
Coaching Plans **Observation Setting** Instructional Delivery Collaborative Team Meeting Instructional Conference Leadership Team	Articulates and **consistently** includes the following in **sequenced and connected** monthly coaching plans aligned to school goals and EGPs: 1) specific, measurable, and ambitious objectives for the professional development cycle; 2) a scope and sequence of coaching activities that follows a gradual release of individual implementation; and 3) a monitoring system. (O) (D – Coaching Plans)	Articulates **and includes the following in monthly coaching plans aligned to school goals and EGPs: 1) specific, measurable, and ambitious objectives for the professional development cycle; 2) a scope and sequence of coaching activities that follows a gradual release of individual implementation; and 3) a monitoring system.** (O) (D – Coaching Plans)	Articulates and writes **monthly coaching objectives and plans aligned to analysis/interpretation of teacher needs and school improvement goals**. (O) (D – Coaching Plans)	Articulates and writes coaching plans aligned to school improvement goals. (O) (D – Coaching Plans)	

IMPLEMENTING PROFESSIONAL LEARNING RUBRIC

Aligns with In-TASC Standard 2 (Learning Differences), 3 (Learning Environments), 4 (Content Knowledge), 5 (Application of Content),6 (Assessment), 7 (Planning for Instruction), and 8 (Instructional Strategies)

The *Implementing Professional Learning* rubric is designed to support the coach in providing job-embedded, research-driven, team-based, differentiated, and results-oriented professional development aligned to the Continuous Improvement Plan, Educator Goal Plan, and Learning Observation Instrument. Through demonstration of instruction, effective facilitation of collaborative learning teams, and focused dialogue and feedback within instructional conferences all focused on the relationship between teaching and learning, the coach can develop teacher capacity to improve student achievement.

Element	4	3	2	1	0
	Descriptors				
Task Analysis Observation Setting Instructional Delivery / Collaborative Team Meeting / Instructional Conference / Leadership Team	Planned/Taught lesson objective(s), sub-objective(s), & materials are logically organized/sequenced in relation to the lesson, unit, and **year-long plan**. (7c)	Planned/Taught lesson objective(s), sub-objective(s), & materials **anticipate possible student misconceptions** and are logically organized/ sequenced in relation to lesson and **unit.** (4f, 7b, 7c)	Planned/Taught lesson objective(s), **sub-objective**(s), & materials are aligned to content standards, **segmented for learning, reflect prior learning, and are logically organized/ sequenced in relation to the lesson.** (4d, 4f, 7b, 7c)	Planned/Taught lesson objective(s) and materials are **sequenced** and aligned to content standards. (7b, 7c)	
Conceptual Understanding Observation Setting Instructional Delivery / Collaborative Team Meeting / Instructional Conference / Leadership Team	**Guides all students to create or select their own representations and explanations of concepts**; ensures students demonstrate understanding of concepts through multiple ways/examples. Utilizes questions at essential sub-objectives with increasing complexity or depth of content **that are differentiated according to student cognitive level**. (2a, 2c, 4a, 8i)	Utilizes **effective** representations and explanations of concepts **throughout the lesson** that capture key ideas and details that build conceptual understanding in the discipline; prompts students to demonstrate understanding of concepts through multiple ways/examples. Utilizes questions at essential sub-objectives **with increasing complexity or depth of content**; surface learner misconceptions that may interfere with learning. (2a, 4a, 4e, 8i)	Utilizes representations and explanations of concepts (*e.g., comparisons, analogies, examples, TPR, realia, manipulatives, anchor charts, graphic organizers*) that capture **key ideas and details** that build **conceptual** understanding in the discipline. Utilizes questions **at essential sub-objectives** that support student understanding in the discipline and stimulate discussion for a specific purpose (*e.g., probing for learner understanding, helping learners articulate their ideas and thinking processes, encouraging students to question and analyze ideas from diverse perspectives*). (4a, 4b, 8i)	Utilizes representations **and** explanations of concepts that capture **key ideas** essential to build understanding of the lesson outcome. Utilizes questions within the lesson to probe for learner understanding related to the lesson outcome. (4a, 8i)	

Element	4	3	2	1	0
	Descriptors				
Instructional Approach Observation Setting Instructional Delivery / Collaborative Team Meeting / Instructional Conference / Leadership Team	Explicitly models an exemplary product/performance, **free of distractions**, by labeling steps or concepts, with precise academic vocabulary and clear articulation of meta-cognition. **AND/OR** Presents problems/situations and allows open-ended processing of thinking or experimentation; **uses precise academic vocabulary while eliciting student predictions or conjectures about content, and supporting students in justifying their ideas**. (6f, 8d, 8e, 8f, 8i)	Explicitly models an exemplary product/procedure/ performance by labeling steps or concepts with precise academic vocabulary and **clear articulation of meta-cognition**. **AND/OR** Presents problem/situation and allows open-ended processing of thinking or experimentation; **uses precise academic vocabulary** while clarifying their understandings/ **misunderstandings, developing explanations, and communicating ideas**. (6f, 8d, 8e, 8f, 8i)	**Explicitly** models an exemplary product/procedure/performance by labeling steps or concepts **with precise academic vocabulary.** Supports students, at **essential sub-objectives** in using clear academic vocabulary/labels (*verbal, written, or non-linguistic representation*) **to solidify learning.** **AND/OR** Presents problem/situation and allows open-ended processing of thinking or experimentation; **uses precise academic vocabulary while clarifying understandings.** Supports students at **essential sub-objectives in using clear academic vocabulary/labels** (*verbal, written, or non-linguistic representation*) **to solidify learning.** (8d, 8e, 8f, 8i)	**Models** a task/performance by labeling the steps/criteria. **AND/OR** Presents problem/situation to **allow open-ended processing of thinking or experimentation**. (8d, 8e)	
Practice/ Aligned Activity Observation Setting Instructional Delivery / Collaborative Team / Instructional Conference / Leadership Team	Engages all students in examining their own thinking **and/or** learning; **students effectively provide support for one another.** (3b, 6f)	Provides sufficient, aligned practice or conceptual development activity **aligned to appropriate sub-objective(s).** **Effectively** provides scaffolding for students **who need assistance and appropriately fades away or renews support as needed to ensure all students** are challenged to move toward independence. (2b)	Provides **sufficient, aligned practice or conceptual development activity** to support **successful learning** of the lesson objective. Actively guides and scaffolds individual students as they practice the objective and move toward independence (*e.g., referencing posted steps, anchor charts, graphic organizers or templates, coaching, questioning, prompting, cueing*). (2a)	Provides opportunity for students to practice the lesson objective before independent practice is assigned; **or** provides opportunity during the conceptual development activity for students to work toward mastery of the lesson objective.	

Element	4	3	2	1	0
	Descriptors				
Authentic Engagement Observation Setting Instructional Delivery / Collaborative Team Meeting / Instructional Conference / Leadership Team	Facilitates authentic engagement by: **(1) Involving all students in generating and evaluating new ideas and novel approaches, seeking inventive solutions to problems, and developing original work; and (2) Collaborates with all students to design and implement relevant learning experiences.** (2a, 3b, 5f, 5g, 7a, 8c, 8i)	Facilitates authentic engagement by assigning **differentiated, meaningful tasks that require complex thinking,** that most students associate with a result or outcome that has clear meaning and personal relevance. (2a, 7a, 8c, 8i)	Facilitates authentic engagement by assigning tasks that **most students** associate with a result or outcome that has clear meaning **and personal relevance** (*connects task(s) to learning outcome relative to big idea; purpose for learning*). (7a, 8c, 8i)	Assigns tasks that **some students associate with a result or outcome that has clear meaning**.	
Monitor and Adjust Observation Setting Instructional Delivery / Collaborative Team Meeting / Instructional Conference / Leadership Team	Checks for understanding by eliciting overt responses from all students at essential sub-objective levels. Utilizes student responses to appropriately move forward with or adjust one or more of the following at the **individual level**: Instructional approach (*e.g., pacing, modeling, questioning, guided practice, feedback, etc.*) Content sub-skills or complexity (*e.g. number in problem or Lexile*) Depth of knowledge Grouping Task/Product requirements (2b, 8a, 8b)	Checks for understanding by eliciting overt responses from **all students** at essential sub-objective levels. Utilizes student responses to appropriately move forward with or adjust one or more of the following at the **sub group level:** Instructional approach (*e.g., pacing, modeling, questioning, guided practice, feedback, etc.*) Content sub-skills or complexity (*e.g. number in problem or Lexile*) Depth of knowledge Grouping Task/Product requirements (2b, 8a, 8b)	Checks for understanding by eliciting overt responses **from most students (75% or more)** at **essential sub-objective levels**. **Utilizes student responses to appropriately** move forward with or adjust **one or more** of the following : Instructional approach (*e.g., pacing, modeling, questioning, guided practice, feedback, etc.*) Content sub-skills or complexity (*e.g. number in problem or Lexile*) Depth of knowledge Grouping Task/Product requirements (8a, 8b)	Elicits overt responses from **at least half (50%)** of the students to either move forward with or adjust instruction. (8a, 8b)	

Element	4	3	2	1	0
	Descriptors				
Professional Development: New Learning **Observation Setting** **Instructional Delivery** / Collaborative Team Meeting / Instructional Conference / Leadership Team	Ensures professional development has a specific, measurable, and ambitious objective that connects to a series of professional development cycles that leads to CIP goal(s). (O) Ensures professional learning is differentiated, **team-based, results-oriented,** and job-embedded with clear targets for teacher practice and student learning. (O) Engages teachers in reflective interactions applying learning to previous and future instructional practice **within multiple contexts.** (O)	**Ensures professional development has a specific, measurable, and ambitious objective that connects to a series of professional development cycles that leads to CIP goal(s).** (O) Ensures professional learning is **differentiated** and job-embedded with clear targets for teacher practice and student learning. (O) Engages teachers in **reflective interactions** applying learning to previous **and future** instructional practice. (O)	Delivers professional development that is aligned to CIP goals. (O) **Ensures professional learning is job-embedded with clear targets for teacher practice and student learning.** (O) **Engages teachers in applying learning to previous instructional practice.** (O)	Delivers professional development that aligns to Continuous Improvement Plan (CIP) goals. (O) Engages teachers in the professional learning. (O)	
Research **Observation Setting** Instructional Delivery / **Collaborative Team Meeting** / Instructional Conference / Leadership Team	**Teachers identify and apply** current research **from multiple sources to foster an ongoing discussion of best practices and relationship to the LOI teaching practices and learning processes that meet the needs of all students.** (O)	**Guides teachers in researching** current literature and connecting it to utilization of the LOI, lesson planning, **school or** district professional development, **and** other resources (i.e. *professional organizations, workshops, journals, study groups, local action research, the Internet, the community, and other relevant sources*). (O)	**Accesses, uses, and links current research to lesson planning or instructional practices using the LOI, district professional development, and/or professional resources to increase the knowledge base of assigned teachers.** (O)	Makes available aligned professional resources for reference and connects to Learning Observation Instrument (LOI). (O)	
Standards Implementation **Observation Setting** Instructional Delivery / **Collaborative Team Meeting** / Instructional Conference / Leadership Team	Communicates an in-depth understanding of content vertical progressions **in more than one subject and facilitates teachers in content integration** of mathematics or English language arts standards with other content(s). (O) **Team members demonstrate proficient understanding of curriculum and ability to apply knowledge of curriculum** as they unpack standards, map curriculum, develop aligned assessments, select/create resources, and/or develop unit plans **aligned to year-long plans.** (O)	Communicates an in-depth understanding of content through vertical progressions **and can apply knowledge in more than one subject.** (O) **Guides understanding of curriculum and application to teaching by guiding** teachers as they unpack standards, map curriculum, develop aligned assessments, select/create resources, **and/or develop unit plans.** (O)	Communicates an in-depth understanding of content **through vertical progressions.** (O) Supports implementation of curriculum by helping teachers to unpack standards, map curriculum, **develop aligned assessments, and/or select aligned resources for a sequence of lessons that lead to attainment of a standard or performance objective.** (O)	Communicates an in-depth understanding of some content concepts and how concepts progress within a cluster of grades. (O) Supports implementation of curriculum by helping teachers to unpack standards and map curriculum for application to daily lesson planning. (O)	

Element	4	3	2	1	0
	Descriptors				
Group Facilitation **Observation Setting** Instructional Delivery / **Collaborative Team Meeting** / Instructional Conference / Leadership Team	Uses agenda with clearly stated prioritized objectives; **harnesses the expertise of participants to monitor progress, advance shared goals, and develop quality products; and participants share in the use of facilitation strategies** *(maintains neutrality, clarifies role with group, focuses group energy, keeps group on task, encourages everyone to participate, and ensures safety in sharing ideas).* (O) **Participants** reinforce the norms and direct processes to be used in the meeting to match meeting's purpose (*dialogue, reflection, shared decision making, planning or problem solving*). (O) **Checks for understanding with meeting participants** to ensure clear expectations for next steps, responsible persons, due date, and manner of follow-up. (O)	Uses agenda with clearly stated **prioritized** objectives, makes efficient use of time, makes progress on **priority** action items, and uses **nearly all** of the following facilitation strategies: maintains neutrality, clarifies role with group, focuses group energy, keeps group on task, encourages everyone to participate, and ensures safety in sharing ideas. (O) **Reinforces shared accountability** for norms and directs processes and resources to be used in the meeting to match meeting's purpose (*dialogue, reflection, shared decision making, planning or problem solving*). (O) Ensures clear identification of next steps, **responsible persons, and when task should be completed.** (O)	Uses agenda with clearly stated objectives, **makes efficient use of time;** makes progress on majority of action items, and uses a few of the **following facilitation strategies:** maintains neutrality, clarifies role with group, focuses group energy, keeps group on task, encourages everyone to participate, and ensures safety in sharing ideas. (O) **Directs the norms, processes, and resources to be used in the meeting to match meeting's purpose** (*dialogue, reflection, shared decision-making, planning or problem solving*). (O) **Ensures all next steps are clearly identified.** (O)	Clearly states objectives to provide focus, adheres to agenda, and uses one of the following facilitation strategies: maintains neutrality, clarifies role with group, focuses group energy, keeps group on task, encourages everyone to participate, and ensures safety in sharing ideas. (O) States the norms or protocols and garners support from group, and uses communication strategies for specific audience. (O) Identifies next steps (*sticks to the agenda, establishes time limits, maintains focus*). (O)	
Post - Conference: Data Gathering **Observation Setting** Instructional Delivery / Collaborative Team Meeting / **Instructional Conference** / Leadership Team	Focuses conference on objectives derived from accurate analysis of instruction, content rigor, student misconceptions, **and knowledge of teacher as a learner.** (O) **Teacher self reflects** on lesson assessment data (*for whole group, sub-groups, and **individuals***) and teacher plans or actions to **make conjectures** about the relationship between teaching and student learning. (O) **Uses teacher conjectures** to adjust or transition with **efficient, appropriate, and focused** follow-up questions; and ascertains teacher knowledge of elements, attributes, **and when and how to use elements effectively.** (O)	Focuses conference on objectives derived from accurate analysis of instruction, **content rigor, and student misconceptions**. (O) **Guides** teacher reflection on lesson assessment data (*for whole group and sub-groups*) and teacher plans or actions to **analyze the cause and effect relationship between teaching and student learning**. (O) **Uses teacher responses to adjust or transition with follow-up questions and ascertains teacher knowledge of element and attributes**. (O)	Focuses conference on objectives **derived from accurate analysis of instruction.** (O) Engages teacher reflection on (*whole group **and sub-group***) lesson assessment data and teacher plans or actions. (O) Asks initial questions **and follow-up** questions aligned to conference objectives **to probe deeper**. (O)	Conducts teacher conference to focus on conference objectives. (O) Engages teacher reflection on whole group lesson assessment data and teacher plans or actions. (O) Asks questions aligned to conference objectives. (O)	

Element	4	3	2	1	0
	Descriptors				
Post-Conference: Reinforcement & Refinement Observation Setting Instructional Delivery / Collaborative Team Mtg / **Instructional Conference** / Leadership Team	**Teacher converses with evaluator in exploration of the content discipline and deep, nuanced knowledge of high-leverage strategies** integral to the cause/effect relationship between teaching and learning (*for whole group, sub-groups, **and individual needs of students and the needs or interests of the teacher***). (O) **Teacher demonstrates understanding** of conference objective rubric element(s) and their purpose, attributes/steps, and insight about when and how to effectively use the **strategy in multiple instructional contexts** (*i.e. content concepts or groupings*). (O)	**Builds on teacher comments to transition to reinforcement and refinement and provide meaning for feedback** focusing on rubric elements integral to the cause/effect relationship between teaching and learning (*for whole group **and sub-groups***), based on evidence from script and student learning artifacts. (O) Shares strategy aligned to conference objective rubric element(s), and teacher demonstrates understanding of purpose, attributes/steps, and when and how to use the strategy to previously taught lesson **and future lessons**. (O)	Provides **relevant feedback focusing on rubric elements integral to the cause/effect relationship between teaching and learning (*for whole group*), based on evidence from script and student learning artifacts.** (O) **Shares strategy aligned to conference objective rubric element(s) and teacher demonstrates understanding of purpose, attributes/steps, and when and how to use the strategy to previously taught lesson.** (O)	Provides practical and specific feedback based on direct quotes from instruction and examples of student learning. (O) Teacher leader checks for understanding, and teacher restates understanding of element and attributes/steps. (O)	
Conference Process Observation Setting Instructional Delivery / Collaborative Team Mtg / **Instructional Conference** / Leadership Team	Ensures conference is clear, well-paced, relevant, **time-efficient,** and engages teacher with **authentic interaction throughout conference.** (O) Uses mirroring body language and oral language that is plural, open-ended, and framed with positive presuppositions, **which results in setting teacher at ease to focus on professional learning and future lessons.** (O)	Ensures conference is clear, well-paced, relevant, **and engages teacher interest and active involvement in conference.** (O) **Uses mirroring body language** and oral language that is **plural, open-ended,** and framed with positive presuppositions **to focus on future lessons.** (O)	Ensures conference is clear, **well-paced,** and relevant. (O) Uses oral language that is **free of judgment and framed with positive pre-suppositions.** (O)	Ensures conference is clear and relevant. (O) Uses oral language that is mostly free of judgment. (O)	
Results Observation Setting Instructional Delivery / Collaborative Team Meeting / Instructional Conference / **Leadership Team**	Articulates and provides evidence that **nearly all** coaching groups **achieve** monthly coaching objectives; **individuals within coaching groups who have not achieved the objective demonstrated progress toward the group goal and their own educator goal plan goals**. (O) (D - coaching records) Demonstrates coaching effectiveness by **90%** of assigned teachers meeting the instructional element component of their educator goal plans (*end of year only*). (D - EGPs)	Articulates and provides evidence that nearly all assigned coaching groups make progress toward monthly coaching objectives **and has a plan for advancing the effectiveness of teachers within coaching groups who have not achieved the group objective**. (O) (D - coaching records) Demonstrates coaching effectiveness by **80%** of assigned teachers meeting the instructional element component of their educator goal plan goals (*end of year only*). (D - EGPs)	**Articulates and provides evidence that nearly all assigned coaching groups make progress toward monthly coaching objectives**. (O) (D - coaching records) Demonstrates coaching effectiveness by **70%** of assigned teachers meeting the instructional element component of their educator goal plan goals (*end of year only*). (D - EGPs)	Evaluates on-going effectiveness of own monthly coaching cycle objectives, implemented professional development, and coaching strategies. (O) (D - coaching records) Demonstrates coaching effectiveness by less than 70% of assigned teachers meeting the instructional element component of their educator goal plan goals (*end of year only*). (D - EGPs)	

Coaching Observation Instrument		Observation Settings				Documentation			Survey
		Instructional Delivery	Collaborative Team Meeting	Instructional Conference	Leadership Team	Coaching Plans	Coaching Data Records	EGPs	Teacher Survey
Enhancing Culture	Relationships			9					9
	Active Listening		9						
	Collaboration		9						9
	Goal Orientation		9						
Designing Support	Student Needs Analysis		9						
	Instructional Analysis		9						
	Instructional Planning		9						
	Adjusting Support				9	9	9		
	Coaching Plans				9	9			
Implementing Professional Learning	Task Analysis	9							
	Conceptual Understanding	9							
	Instructional Approach	9							
	Practice/Aligned Activity	9							
	Authentic Engagement	9							
	Monitor and Adjust	9							
	Professional Development: New Learning	9							
	Research		9						
	Standards Implementation		9						
	Group Facilitation		9						
	Pre and Post Conference: Data Gathering			9					
	Post-Conference: Reinforcement & Refinement			9					
	Conference Process			9					
	Results				9		9	9	

Leading Observation Instrument

Acknowledgement Page

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Nadaburg Unified School District Principal Evaluation Transition Team
Phoenix Union High School District Principal Evaluation Transition Team
Tolleson Elementary School District Principal Evaluation Transition Team
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REIL Cross-District Teacher and Principal Evaluation Teams
REIL Cross-District SuperUser Group
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Ontario Leadership Framework
In-TASC Model Core Teaching Standards, CCSSO
Arizona's Standards and Rubrics for School Improvement
The Learning Leader (Reeves, 2006)
ISLLC Leadership Standards
New Leaders for New Schools Urban Excellence Framework
McREL's Responsibilities of Effective Leaders
Adaptive Schools Handbook (Garmston & Wellman, 2009)
Indiana Department of Education Principal Effectiveness Rubric
The Wallace Foundation: *Assessing the effectiveness of school leaders: New directions and new processes*
The Use of Observation in Principal Evaluation (Milanowski & Kimball, 2011)

SETTING & COMMUNICATING DIRECTION RUBRIC

The *Setting & Communicating Direction* rubric is designed to support the school administrator in building a shared vision and plan for continuous improvement based on data-driven decision making, fostering the acceptance of group goals, and setting and communicating high performance expectations.

Element	4	3	2	1	0
	Descriptors				
Shared Purpose Observation Setting: Business or Parent Meeting; **Leadership Team Meeting**; **Professional Learning**; Instructional Conference; Site Visit	Enlists stakeholders and ensures the shared vision for high student achievement and college readiness is developed, maintained, **clearly articulated, and/or** implemented **by nearly all staff members.** (O) Clearly communicates connection of academic outcomes **and decisions** to vision and CIP goals; and **empowers staff members to lead conversations** that connect short-term and long-term vision to CIP goals and activities. (O)	**Enlists stakeholders and ensures the shared** vision for high student achievement and college readiness **is developed, maintained, and/or implemented**. (O) **Clearly communicates** connection of academic outcomes to vision **and** CIP goals evidenced by **most staff members able to clearly articulate and take action on CIP goals and explain what the vision looks like in the short-term and long-term.** (O)	**Ensures vision and mission promotes high student achievement and college readiness.** (O) **References connection** of academic outcomes to school vision and/or CIP as evidenced by: • Posted vision/mission. • References in planning sessions/meetings. • References in communication materials. (O)	References school vision as evidenced by: • Posted vision/mission. • Referenced in planning sessions/meetings. • Referenced in communication materials. (O)	
CIP: Goal Setting Observation Setting: Business or Parent Meeting; Leadership Team Meeting; Professional Learning; Instructional Conference; Site Visit	Sets or adjusts district-aligned, rigorous, measurable, CIP goals, based **on analysis of recent and longitudinal measures** of teacher evaluation and student achievement data/evidence, and root cause analysis. (D – CIP, Student Achievement Data, & Teacher Observational Data or Artifacts) Ensures **measurable indicators for significant and achievable growth for all students,** with targeted goals to close student achievement gaps, for prioritized student sub-groups **and grade-level/course cohorts** are in place. (D – CIP, Student Achievement Data, & Teacher Observational Data or Artifacts)	Sets or adjusts rigorous, measurable, CIP goals, based on analysis of **multiple sources** of teacher evaluation and student achievement data/evidence **and root cause analysis.** (D – CIP, Student achievement Data & Teacher Observational Data or Artifacts) Ensures targeted goal(s) to close student achievement gaps for prioritized student sub-groups (*e.g., 3rd grade ELL; 10th grade special education*) are in place. (D – CIP, Student Achievement Data, & Teacher Observational Data or Artifacts)	Sets or adjusts **rigorous, measurable, district-aligned goals for the CIP based on analysis of strengths and weaknesses in teacher evaluation and student achievement data and potential cause/effect relationships.** (D – CIP, Student Achievement Data, & Teacher Observational Data or Artifacts)	Sets attainable district-aligned student achievement goals. (D – CIP, Student Achievement Data, & Teacher Observational Data or Artifacts)	

Element	4	3	2	1	0
	Descriptors				
CIP: Action Plans Observation Setting Business or Parent Meeting / Leadership Team Meeting / Professional Learning / Instructional Conference / Site Visit	Works with the staff to write CIP action plans that include the following: • Sequenced, task-analyzed objectives that identify milestones toward the CIP goal. • **Differentiated** year-long PD plans with systematic monitoring and coaching. • **Targeted student intervention systems for identified sub-populations (***differentiated plans /materials, data analysis, remediation/intervention delivery, progress monitoring, communication***).** (D - CIP)	Works with the staff to write CIP action plans that include the following: • Sequenced, task-analyzed objectives that identify milestones toward the CIP for year-long PD and student intervention activities. • Action steps and timelines for achieving objectives. • Identified budget funds, resources, and responsible person(s) aligned to each objective. (D - CIP)	**Works with the staff** to write CIP action plans that include the following: • **Task-analyzed** objectives **that identify milestones toward the CIP goal**. • Action steps and **timelines** for achieving objectives. • Identified **budget funds, resources, and responsible person(s) aligned to each objective.** (D - CIP)	Writes CIP action plan that includes the following: • Objectives aligned to CIP goal(s). • Action steps for each objective in CIP. • Source of funding for identified objectives. (D - CIP)	
School Resource Management Observation Setting Business or Parent Meeting / Leadership Team Meeting / Professional Learning / Instructional Conference / Site Visit	Collaborates with key staff to establish and implement a process for allocating appropriate fiscal resources, evaluate effectiveness of fiscal **and other resource allocation (***time, schedule, technology, staff, funding***), and reallocate resources to meet or exceed student achievement goals.** (D – Management System Artifacts & CIP) **Extends** the resources of school, family members, and community; and actively **maximizes** mutually beneficial relationships with business, religious, political, higher education, and/or service organizations **to add programs, services, extra-curricular activities, and staff outreach to meet student and staff needs.** (D – Management System Artifacts)	Collaborates with key staff to establish and implement a process for allocating appropriate fiscal resources **and evaluate effectiveness of fiscal resource use relative to the attainment of school goals and improvement of student achievement.** (D – Management System Artifacts & CIP) Coordinates the resources of school, family members, and community; **and actively builds mutually beneficial relationships with business, religious, political, higher education, and/or service organizations to support current programming and resources for emerging student needs.** (D – Management System Artifacts)	**Collaborates with key staff** to establish **and implement a process** for allocating appropriate fiscal resources to support the school goals and improve student achievement. (D – Management System Artifacts & CIP) Coordinates the resources of **school, family members, and community** stakeholders to **support and sustain programming for learning and wrap-around social services (***e.g., interns, mentors, in-kind donations, grants, non-profit partnerships***).** (D – Management System Artifacts)	Establishes a process to allocate appropriate fiscal resources that support the school goals and improve student achievement. (D – Management System Artifacts & CIP) Identifies the resources and stakeholders within the community and school to positively affect student and adult learning. (D – Management System Artifacts)	

BUILDING RELATIONSHIPS RUBRIC The *Building Relationships* rubric is designed to support the school administrator in fostering genuine trusting relationships with students, staff, families and communities, guided by a sense of mutual respect. The school administrator affirms and empowers others to work in the best interests of all students.

Element	4	3	2	1	0
	Descriptors				
Accessibility	Structures **frequent and regular** opportunities for **purposeful,** planned contact and interactions with students, staff, and parents in classrooms and throughout the school, and **with colleagues and district staff** (*as evidenced by interactions that reflect knowledge of on-going progress of students and staff in meaningful conversations,* ***sense of ease and expectation to interact with administrator,*** *and administrative schedules*). (O) (D – Management System Artifacts)	**Structures** daily opportunities for planned contact and interactions with students, staff, and parents in classrooms and throughout the school (*as evidenced by interactions that reflect knowledge of on-going progress of students and staff in meaningful conversations and administrative schedules*). (O) (D – Management System Artifacts)	Establishes visibility through **daily opportunities for contact and interactions with students, staff, and parents in classrooms and throughout the school** (*as evidenced by interactions that reflect knowledge of students and staff in meaningful conversations and administrative schedules*). (O) (D – Management System Artifacts)	Is visible at various times throughout the school day. (O)	
Observation Setting Business or Parent Meeting Leadership Team Meeting Professional Learning Instructional Conference Site Visit	Provides accessible information about student expectations, progress and **school goal attainment,** and next steps to students, parents and staff **through an array of forums and formats.** (S – Parent, Staff, & Student)	Provides accessible information about student expectations, progress made, **and next steps** to students, parents, and staff. (S – Parent, Staff, & Student)	**Provides accessible information** about student expectations **and progress** to students, parents, and staff. (S – Parent, Staff, & Student)	Informs students, parents, and staff about academic and behavioral expectations. (S – Parent, Staff, & Student)	
	Partners with parents to create a school community that welcomes and values parents in the school. (S – Parent, Staff, & Student)	Creates a school community that welcomes and **values parents in the school** (*e.g., front office staff, volunteerism, neighborhood outreach or extensions of school, home visits, PTO, site councils*). (S – Parent, Staff, & Student)	**Makes families and communities feel welcome and respected, responds to concerns, and engages in authentic dialogue with parents.** (S – Parent, Staff, & Student)	Responds to parent questions and concerns in a timely manner. (S – Parent, Staff, & Student)	

Element	4	3	2	1	0
	Descriptors				
Mutual Trust & Respect **Observation Setting** Business or Parent Meeting / Leadership Team Meeting / Professional Learning / Instructional Conference / Site Visit	Demonstrates active listening; **displays empathy and concern for the well-being of individuals; and establishes a positive and appropriate rapport with students, staff, families, and/or community members to facilitate** mutual trust and respect. (O) (S – Parent, Staff, & Student)	Demonstrates active listening skills and responds **appropriately to differing perspectives or values to foster mutual trust and respect**. (O) (S – Parent, Staff, & Student)	Demonstrates active listening in conversations with students, parents, and staff and **responds in a respectful way.** (O) (S – Parent, Staff, & Student)	Listens to students, parents and staff in a respectful way. (O) (S – Parent, Staff, & Student)	
Conflict Facilitation **Observation Setting** Business or Parent Meeting / Leadership Team Meeting / Professional Learning / Instructional Conference / Site Visit	Facilitates difficult conversations in a constructive manner and **learns from and encourages** differing perspectives **to gain new perspectives, improve school-wide practices,** and build consensus. (O)	Facilitates difficult conversations in a constructive manner **and incorporates different perspectives (*including voices of dissent*) in conversations to build consensus.** (O)	Facilitates difficult conversations in a **constructive** manner. (O)	**Facilitates** difficult conversations in a neutral manner. (O)	

DEVELOPING THE ORGANIZATION RUBRIC The *Developing the Organization* rubric is designed to support the school administrator in building systems that promote a collaborative culture conducive to change, equitably structure the organization for success, and connect the school to its wider environment.

Element	4	3	2	1	0
	Descriptors				
Group Facilitation **Observation Setting** Business or Parent Meeting / **Leadership Team Meeting** / Professional Learning / Instructional Conference / Site Visit	Uses agenda with clearly stated prioritized objectives; **harnesses the expertise of participants to monitor progress, advance shared goals, and develop quality products; and participants share in the use of facilitation strategies** (*maintains neutrality, clarifies role with group, focuses group energy, keeps group on task, encourages everyone to participate, and ensures safety in sharing ideas*). (O)	Uses agenda with clearly stated **prioritized** objectives, makes efficient use of time, makes progress on **priority** action items, and uses **nearly all** of the following facilitation strategies: maintains neutrality, clarifies role with group, focuses group energy, keeps group on task, encourages everyone to participate, and ensures safety in sharing ideas. (O)	**Uses agenda with** clearly stated objectives**, makes efficient use of time; makes progress on majority of action items, and uses a few of the** following facilitation strategies: maintains neutrality, clarifies role with group, focuses group energy, keeps group on task, encourages everyone to participate, and ensures safety in sharing ideas. (O)	Clearly states objectives to provide focus, adheres to agenda, and uses one of the following facilitation strategies: maintains neutrality, clarifies role with group, focuses group energy, keeps group on task, encourages everyone to participate, and ensures safety in sharing ideas. (O)	
	Participants reinforce the norms and direct processes to be used in the meeting to match meeting's purpose (*dialogue, reflection, shared decision making, planning or problem solving*). (O)	**Reinforces shared accountability** for norms and directs processes and resources to be used in the meeting to match meeting's purpose (*dialogue, reflection, shared decision making, planning or problem solving*). (O)	**Directs the norms, processes, and resources to be used in the meeting to match meeting's purpose** (*dialogue, reflection, shared decision-making, planning or problem solving*). (O)	States the norms or protocols and garners support from group, and uses communication strategies for specific audience. (O)	
	Checks for understanding with meeting participants to ensure clear expectations for next steps, responsible persons, due date, and manner of follow-up. (O)	Ensures clear identification of next steps, **responsible persons, and when task should be completed.** (O)	**Ensures all next steps are clearly identified.** (O)	Identifies next steps. (O)	
Change Process **Observation Setting** Business or Parent Meeting / **Leadership Team Meeting** / **Professional Learning** / Instructional Conference / Site Visit	Uses knowledge of change theory to develop and apply specific strategies most likely to be effective in various situations to **proactively** support school staff in moving from agreement to commitment and engaging in **selective abandonment of practices** unaligned to research-based strategy or CIP and **adoption of new strategies**. (O) (S - Staff)	Uses knowledge of change theory to develop and apply specific strategies **most likely to be effective in various situations** to support school staff in **moving from agreement to commitment** as they engage in changing classroom practice in alignment with school and district initiatives. (O) (S - Staff)	**Uses knowledge of change theory to develop and apply specific strategies to** address resistance to change and support school staff as they engage in changing classroom practice in alignment with school and district initiatives. (O) (S - Staff)	Uses tools and strategies to build agreement for change. (O) (S - Staff)	

Element	4	3	2	1	0
	Descriptors				
Communication **Observation Setting** Business or Parent Meeting Leadership Team Meeting Professional Learning Instructional Conference Site Visit	Develops and implements systems **that achieve** shared decision making with staff, families, and/or the community regarding **concerns, challenges, and potential obstacles to achieving CIP goals**; and progress monitors for effective and consistent **two-way** communication **between teachers, students, and families** about student progress. (O) (D – Management System Artifacts) (S – Staff & Parent) Implements a system to formally and informally acknowledge and celebrate individual and team academic successes **that includes rigorous and progressive benchmarks aligned to goals or vision** on a consistent basis. (D – Management System Artifacts)	Develops and implements systems to increase **shared decision making** with staff, families, and/or the community regarding **shared purpose**, key school information, events/programming **challenges**, decisions, and school improvement; **and creates expectations for consistent communication from teachers to families about student progress.** (O) (D – Management System Artifacts) (S – Staff & Parent) **Implements a system** to formally and informally acknowledge and celebrate individual and team **academic successes on a consistent basis.** (D – Management System Artifacts)	**Develops systems to promote two-way communication and participation with staff and/or families regarding key school information, events/ programming decisions, and school improvement**. (O) (D – Management System Artifacts) (S – Staff & Parent) Celebrates individual and team accomplishments on a **formal and** informal basis. (D – Management System Artifacts)	Communicates key school information and events to staff on a regular basis and invites staff and parents to participate on committees for school improvement. (O) (D – Management System Artifacts) (S – Staff & Parent) Celebrates individual and team accomplishments on an informal basis. (D – Management System Artifacts)	
Management Systems **Observation Setting** Business or Parent Meeting Leadership Team Meeting Professional Learning Instructional Conference Site Visit	**Engages staff in the analysis of system data at key intervals,** to inform the development, maintenance, **monitoring,** and/or revision of effective and consistent systems and administrative routines **for most** operations to address real and potential challenges to safety, security, or teaching and learning. (O) (D – Management System Artifacts) (S – Staff)	**Engages staff** in the development, maintenance, and/or revision of effective and consistent systems and administrative routines for critical operations to support instructional priorities, emotional safety and physical safety of students and staff, and an efficient, orderly learning environment free of distractions or disruptions. (O) (D – Management System Artifacts) (S – Staff)	Implements **effective and consistent systems and administrative routines for critical operations** (*e.g., discipline, communication, schedules, attendance*) to support instructional priorities, emotional safety and physical safety of students and staff, and an efficient, orderly learning environment free of distractions or disruptions. (O) (D – Management System Artifacts) (S – Staff)	Manages the organization and operation for a clean, safe, orderly, learning environment in compliance with city codes, board policy, state statute, district standard operating procedures, and site procedures. (O) (D – Management System Artifacts) (S – Staff)	

Element	4	3	2	1	0
	Descriptors				
Recruitment, Retention, & Succession Planning **Observation Setting** Business or Parent Meeting **Leadership Team Meeting** Professional Learning Instructional Conference Site Visit	Makes high quality staff selections, ensures equitable distribution of highly effective staff members, and establishes systems for recruiting and **retaining** highly effective educators. (D – Management System Artifacts) **Identifies, equips, and places staff members in career pathway positions or intentional assignments** with effective formal and informal mentoring to build leadership capacity and to **ensure succession plans for every position in school.** (O) (D – Management System Artifacts)	Makes high quality staff selections, ensures equitable distribution of highly effective staff members, **and establishes systems for recruiting high quality candidates** (*i.e. pre-service internships or student teaching*). (D – Management System Artifacts) **Provides formal or informal leadership opportunities** to mentor emerging staff leaders by delegating appropriate leadership tasks to competent staff members, checking on progress, and providing support. (O) (D – Management System Artifacts)	Makes high quality staff selections **and ensures equitable distribution of highly effective staff members**. (D – Management System Artifacts) Identifies, **develops, and advises** effective staff members in order to build leadership capacity consistent to meet school needs. (O) (D – Management System Artifacts)	Makes high-quality staff selections. (D – Management System Artifacts) Identifies developing staff members and pairs with effective staff members for informal mentoring and models of effective practice. (O) (D – Management System Artifacts)	

LEADING INSTRUCTION RUBRIC The *Leading Instruction* rubric is designed to support the school administrator in leading the instructional program by maintaining high expectations for learning outcomes and closing the achievement gap, providing high quality differentiated professional learning, ensuring fidelity of instructional alignment to state standards and curriculum, and implementing teacher evaluation process.

Element	4	3	2	1	0
	Descriptors				
Observation & Evaluation of Instruction Observation Setting: Business or Parent Meeting; Leadership Team Meeting; Professional Learning; **Instructional Conference**; Site Visit	Accurately scripts teacher and student statements, **analyzes instruction, and labels script for specific instructional feedback examples in conference** and evidence of observations and evaluation ratings. (O) (D – Teacher Observational Data or Artifacts) Uses REIL Learning Observation/ Documentation Process to accurately evaluate assigned teachers' performance as evidenced by a rating of **"exceeds"** on the annual certified evaluator assessment. (D – Certified Evaluator Rating)	Accurately scripts teacher and student statements **in a comprehensive manner** (*e.g., time intervals, learner engagement data, teacher movement patterns*) to provide evidence of observations and evaluation ratings. (O) (D – Teacher Observational Data or Artifacts) Uses REIL Learning Observation/ Documentation Process to accurately evaluate assigned teachers' performance **as evidenced by a rating of "meets" on the annual certified evaluator assessment.** (D – Certified Evaluator Assessment)	**Accurately** scripts teacher and student statements to provide evidence of observations and evaluation ratings. (O) (D – Teacher Observational Data or Artifacts) Earns Provisional Certified Evaluator status on the annual certified evaluator assessment. (D – Certified Evaluator Assessment)	Scripts teacher and student statements to provide evidence of observations and evaluation ratings. (O) (D – Teacher Observational Data or Artifacts) Earns Qualified Evaluator status on the annual certified evaluator assessment. (D – Certified Evaluator Assessment)	
Pre & Post Conference: Data Gathering Observation Setting: Business or Parent Meeting; Leadership Team Meeting; Professional Learning; **Instructional Conference**; Site Visit	Focuses conference on objectives derived from accurate analysis of instruction, content rigor, student misconceptions, and **knowledge of teacher as a learner.** (O) **Teacher self reflects** on lesson assessment data (*for whole group, sub-groups, **and individuals***) and teacher plans or actions to **make conjectures** about the relationship between teaching and student learning. (O) **Uses teacher conjectures** to adjust or transition with **efficient, appropriate, and focused** follow-up questions; and ascertains teacher knowledge of elements, attributes, **and when and how to use elements effectively.** (O)	Focuses conference on objectives derived from accurate analysis of instruction, **content rigor, and student misconceptions.** (O) **Guides** teacher reflection on lesson assessment data (*for whole group and sub-groups*) and teacher plans or actions **to analyze the cause and effect relationship between teaching and student learning.** (O) **Uses teacher responses to adjust or transition with follow-up questions and ascertains teacher knowledge of element and attributes.** (O)	Focuses conference on objectives **derived from accurate analysis of instruction**. (O) Engages teacher reflection on (*whole group **and sub-group***) lesson assessment data and teacher plans or actions. (O) Asks initial questions and **follow-up** questions aligned to conference objectives **to probe deeper.** (O)	Conducts teacher conference to focus on conference objectives. (O) Engages teacher reflection on whole group lesson assessment data and teacher plans (*pre-conference*) or actions (*post-conference*). (O) Asks questions aligned to conference objectives. (O)	

Element	4	3	2	1	0
	Descriptors				
Post Conference: Reinforcement & Refinement Observation Setting Business or Parent Meeting / Leadership Team Meeting / Professional Learning / **Instructional Conference** / Site Visit	**Teacher converses with evaluator and demonstrates exploration of the content discipline and deep, nuanced knowledge of high-leverage strategies** integral to the cause/effect relationship between teaching and learning (*for whole group, sub-groups, **and individual needs of students and the needs or interests of the teacher***). (O) **Teacher demonstrates understanding** of conference objective rubric element(s) and their purpose, attributes/steps, and insight about when and how to effectively use the **strategy in multiple instructional contexts** (*i.e. content concepts or groupings*). (O)	**Builds on teacher comments to transition to reinforcement and refinement and provide meaning for feedback** focusing on rubric elements integral to the cause/effect relationship between teaching and learning (*for whole group **and sub-groups***), based on evidence from script and student learning artifacts. (O) Shares strategy aligned to conference objective rubric element(s), and teacher demonstrates understanding of purpose, attributes/steps, and when and how to use the strategy to previously taught lesson **and future lessons.** (O)	Provides **relevant** feedback **focusing on rubric elements integral to the cause/effect relationship between teaching and learning (*for whole group*), based on evidence from script and student learning artifacts.** (O) **Shares strategy aligned to conference objective rubric element(s) and teacher demonstrates understanding of purpose, attributes/steps, and when and how to use the strategy to previously taught lesson.** (O)	Provides practical and specific feedback based on direct quotes from instruction and examples of student learning. (O) Teacher leader checks for understanding, and teacher restates element and attributes/steps. (O)	
Professional Development: New Learning Observation Setting Business or Parent Meeting / Leadership Team Meeting / **Professional Learning** / Instructional Conference / Site Visit	Ensures professional development has a specific, measurable, and ambitious objective that connects to a series of professional development cycles that leads to CIP goal(s). (O) Ensures professional development is differentiated, **team-based, results-oriented**, and job-embedded with clear targets for teacher practice and student learning. (O) Engages teachers in reflective interactions applying learning to previous and future instructional practice **within multiple contexts.** (O) Maintains focus on narrowed initiatives and **adjusts pacing of new PD objective cycles to allow sufficient time for teachers to build confidence and competence with current learning before advancing with new learning.** (O)	**Ensures professional development has a specific, measurable, and ambitious objective that connects to a series of professional development cycles that leads to CIP goal(s).** (O) Ensures professional development is **differentiated** and job-embedded with clear targets for teacher practice and student learning. (O) Engages teachers in **reflective interactions** applying learning to previous **and future** instructional practice. (O) Maintains focus on narrowed initiatives to buffer staff from competing expectations for learning or implementation. (O)	Delivers professional development that is aligned to CIP goals. (O) **Ensures professional development is job-embedded with clear targets for teacher practice and student learning.** (O) **Engages teachers in applying learning to previous instructional practice.** (O)	Ensures professional development aligns to Continuous Improvement Plan (CIP) goals. (O) Engages teachers in the professional learning. (O)	

Element	4	3	2	1	0
	Descriptors				
Collaborative Learning Structures **Observation Setting** Business or Parent Meeting / Leadership Team Meeting / **Professional Learning** / Instructional Conference / Site Visit	Creates and successfully implements multiple flexible structures for professional learning and **weekly** collaboration to meet vertical, horizontal, and/or integrated team-specific learning/achievement goals **with protocols to support team SMART goal development, action plan implementation** (including **reflection on prior instruction or assessment strategies, lesson or unit** planning, **examination of student work**, analysis of **disaggregated** data, **modification of materials to address gaps**, and/or assessment development) **and reflection of group processes.** (O) (D – Management System Artifacts)	Creates **and supports** the utilization of multiple **flexible** grouping structures for scaffolding professional learning, and ensures teams collaborate ***(at least twice monthly)*** to meet team-specific student learning/achievement goals and individual teacher needs for content, **planning, analysis of data, assessment development** and/ or rubric element instructional strategies. (O) (D – Management System Artifacts)	**Utilizes multiple structures for scaffolding professional learning, and ensures** (*via agenda/notes collection, visitations, verbal feedback to teams, etc.*) **teams collaborate** to meet team-specific (*school, grade level, or vertical content*) student learning/achievement goals **and individual teacher needs for content or rubric elements**. (O) (D – Management System Artifacts)	Provides structures (*e.g., collaborative learning team common planning time, or grade level /subject area meeting*) for the purpose of meeting team specific student learning /achievement goals. (O) (D – Management System Artifacts)	
Professional Development: Adjusting Support **Observation Setting** Business or Parent Meeting / **Leadership Team Meeting** / Professional Learning / Instructional Conference / Site Visit	**Accurately** analyzes student learning data and **in-depth** patterns of teacher progress, **relevant** teacher conceptions/misconceptions, and **anecdotal information about teacher**. (O) (D – Instructional Support Plans) Accurately identifies high priority next areas for refinements in content, rigor, **and/or** pedagogical shifts for differentiated teacher groups **and targeted student groups.** (O) (D – Instructional Support Plans) **Interprets** the impact of **the type of instructional support and the strategy for delivery (*i.e. frequency, duration, and level of scaffolding*)** on the progress of differentiated groups or individual teachers and makes adjustments to **the type of instructional support and strategies for delivery (*i.e. frequency, duration, level of scaffolding*)** to remove obstacles and improve student achievement. (O) (D – Instructional Support Plans)	Analyzes student learning data and **patterns** of teacher progress, **teacher conceptions, and teacher misconceptions**. (O) (D – Instructional Support Plans) **Accurately** identifies **high priority next areas** for refinements in content, rigor, **and/or** pedagogical shifts for differentiated groups. (O) (D – Instructional Support Plans) **Interprets the impact of instructional support strategies on the progress of differentiated groups or assigned individual teachers and makes adjustments to future instructional support to remove obstacles and improve student achievement.** (O) (D – Instructional Support Plans)	**Collects and analyzes teacher progress monitoring evidence of instructional effectiveness.** (O) (D – Instructional Support Plans) **Identifies needs for refinements in content, rigor, and/or pedagogical shifts for differentiated groups.** (O) (D – Instructional Support Plans) **Identifies relationship between professional development efforts and impact on student learning to adjust instructional support for teacher groups**. (*i.e. planning, content or pedagogy training, application/practice in collaborative teams, observation, coaching, checking for understanding*). (O) (D – Instructional Support Plans)	Maintains records of teacher progress and articulates the progress and potential obstacles of individual teachers. (O) (D – Instructional Support Plans) Identifies refinements in pedagogical shifts for at least one teacher group. (O) (D – Instructional Support Plans) Identifies areas of professional development support that need adjustment. (O) (D – Instructional Support Plans)	

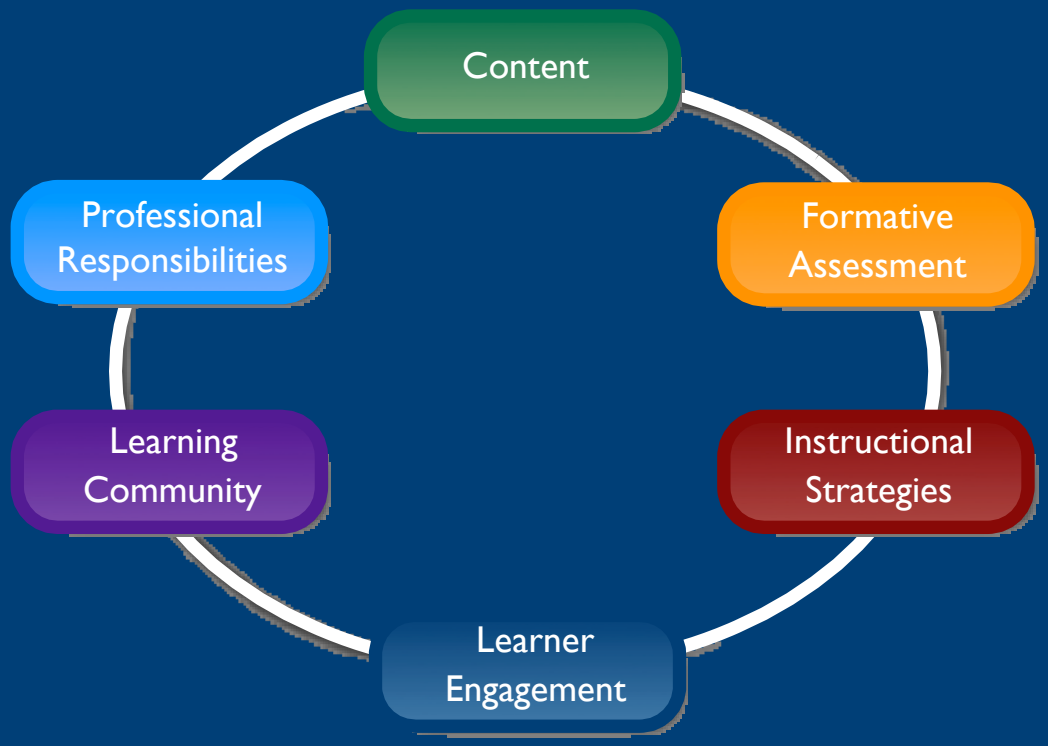
SECURING ACCOUNTABILITY RUBRIC The *Securing Accountability* rubric is designed to support the school administrator in creating conditions for student success The school administrator monitors the continuous improvement plan (CIP) to meet or exceed rigorous, student achievement goals in order to close achievement gaps or maintain high levels of performance.

Element	4	3	2	1	0
	Descriptors				
Accountability for Goals **Observation Setting** Business or Parent Meeting / **Leadership Team Meeting** / Professional Learning / Instructional Conference / Site Visit	Utilizes an effective process to consistently monitor, review and revise horizontal **and vertical team** goals/action plans and/or CIP. (O) (D – CIP) **Exceeds** school-wide performance goals for student achievement and for targeted sub-groups in core content areas. (D – Student Achievement Data)	Utilizes an effective process to consistently monitor, review and revise **horizontal team goals/action plans** and/or CIP. (O) (D – CIP) Meets performance goals for student achievement **in targeted sub-groups in core content** areas. (D – Student Achievement Data)	Utilizes an **effective** process to **consistently monitor, review, and revise team goals or CIP in critical areas** (*e.g., tracks annual outcomes and monthly/weekly data against plan milestones to monitor, track, and review progress; adjusts strategies in order to reach goals*). (O) (D – CIP) **Meets** performance goals for student achievement in **core content** areas. (D – Student Achievement Data)	Utilizes a process to monitor school or team goals. (O) (D – CIP) Demonstrates measurable **student achievement gains** in **core content** goal areas. (D – Student Achievement Data)	
Supervision of, Written, Taught, & Tested Curriculum **Observation Setting** Business or Parent Meeting / Leadership Team Meeting / Professional Learning / Instructional Conference / **Site Visit**	Monitors teaching to assess alignment **and team-specific** gaps between written, taught, tested curriculum and student achievement results; summarizes implementation of **more than** one content vertical progression. (O) (D –Teacher Observational Data or Artifacts)	Monitors teaching to assess alignment **and gaps between written, taught, and tested curriculum and student achievement results; summarizes implementation of at least one content vertical progression.** (O) (D – Teacher Observational Data or Artifacts)	Monitors teaching alignment to the standards **in all subjects** through teacher evaluation process, classroom visits, and supervision of collaborative team meetings. (O) (D –Teacher Observational Data or Artifacts)	Monitors teaching of the standards in core subjects (*or assigned core subject for assistant principal*) through teacher evaluation process, classroom visitations, and supervision of collaborative team meetings. (O) (D – Teacher Observational Data or Artifacts)	

Element	4	3	2	1	0
	Descriptors				
Implementation of Strategies Observation Setting Business or Parent Meeting / Leadership Team Meeting / Professional Learning / Instructional Conference / Site Visit	Establishes academic priorities that are non-negotiable, and teachers demonstrate **implementation** of strategies to promote the academic priorities **throughout the school or assigned group of teachers**. (O) Holds staff and teams accountable for implementing CIP aligned strategies **and tracks effectiveness of implementation of strategies by school and team based on teaching and student learning.** (D – Management System Artifacts)	Establishes academic priorities that are non-negotiable**, and teachers demonstrate support of strategies to promote the academic priorities.** (O) Holds staff and teams accountable for implementing CIP aligned strategies **and tracks effectiveness of implementation of strategies school-wide**. (D – Management System Artifacts)	Establishes academic priorities **that are non-negotiable.** (O) **Holds staff and teams accountable for implementing strategies that align teaching and learning with CIP.** (D – Management System Artifacts)	Establishes academic priorities. (O) Communicates expectation for implementing strategies that align to CIP. (D – Management System Artifacts)	
Educator Goal Plans Observation Setting Business or Parent Meeting / Leadership Team Meeting / Professional Learning / Instructional Conference / Site Visit	Develops and/or annually revises Educator Goal Plans in collaboration with teachers that include measurable goals that will have the greatest impact on student learning, aligned action steps, and sufficient support or resources for the teacher clearly identified within the plan and **provided to nearly all teachers**. (D – Educator Goal Plan) Produces documentation that **90%** of teachers achieved their EGP goals. (D – Educator Goal Plan)	Develops and/or annually revises Educator Goal Plans in collaboration with teachers that include measurable goals that will have the greatest impact on student learning, aligned action steps, and sufficient support or resources for the teacher clearly identified within the plan **and provided to most teachers**. (D – Educator Goal Plan) Produces documentation that **80%** of teachers achieved their EGP goals. (D – Educator Goal Plan)	Develops and/or annually revises Educator Goal Plans in collaboration with teachers that include measurable goals and aligned actions steps for all assigned teachers using student achievement and teacher observation data. (D – Educator Goal Plan) Produces documentation that **70%** of teachers achieved their EGP goals. (D – Educator Goal Plan)	Develops and/or annually revises Educator Goal Plan for all teachers using refinement goal from assigned teachers' observation(s). (D – Educator Goal Plan) Produces documentation that **less than 70%** of teachers achieved their EGP goals. (D – Educator Goal Plan)	

Leading Observation Instrument		Observation Settings					Documentation							Survey		
		Business or Parent Meeting (1X)	Leadership Team Meeting (2X)	Professional Learning (2X)	Instructional Conference (1X)	Site Visit (2X)	CIP Plans	Instructional Support Plans	Educator Goal Plans	Student Achievement Data	Certified Evaluator Rating	Management System Artifacts	Teacher/School Observational Data or Artifacts	Parent Survey	Staff Survey	Student Survey
Setting & Communicating Direction	Shared Purpose		√√	√√												
	CIP: Goal Setting						√			√			√			
	CIP: Action Plans						√									
	School Resource Management						√√					√√				
Building Relationships	Accessibility					√√						√√		√	√	X
	Mutual Trust & Respect	√				√√								√	√	X
	Conflict Facilitation		√√	√√												
Developing the Organization	Group Facilitation	√	√√													
	Change Process		√√	√√											√	
	Communication	√										√		√	√	
	Management Systems	√										√			√	
	Recruitment, Retention, & Succession Planning		√√									√√				
Leading Instruction	Observation & Evaluation of Instruction				√						√		√			
	Pre & Post Conference: Data Gathering				√											
	Post Conference: Reinforcement & Refinement				√											
	Professional Development: New Learning			√√												
	Collaborative Learning Structures			√√								√				
	Professional Development: Adjusting Support		√√					√√								
Securing Accountability	Accountability for Goals		√√				√			√						
	Supervision of Written, Taught, & Tested Curriculum					√√							√√			
	Implementation of Strategies					√√						√√				
	Educator Goal Plans								√√							

√ = Required score **X = Optional score**



Learning Observation Instrument Handbook | 2012-2013

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MCESA
Maricopa County Education Service Agency

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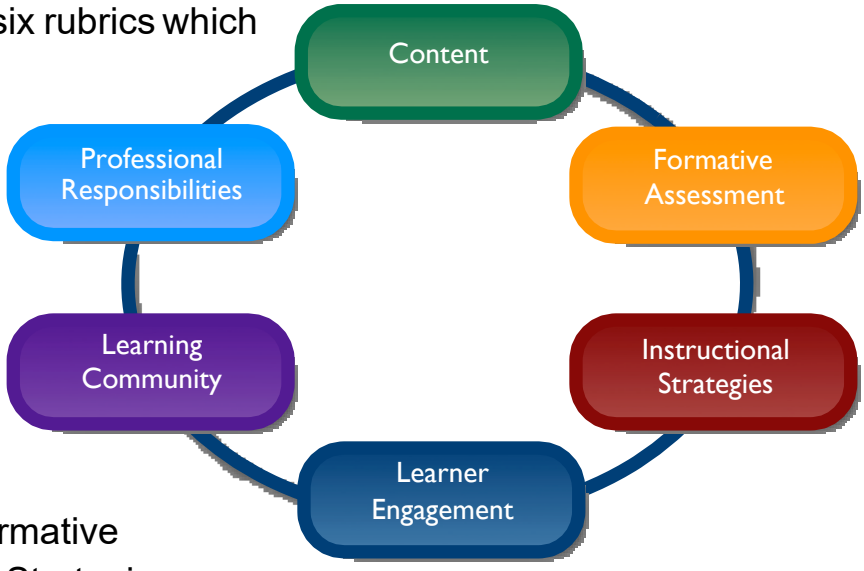
The Rewarding Excellence in Instruction and Leadership (REIL) is an initiative of the Maricopa County Education Service Agency (MCESA)

The Learning Observation Instrument (LOI)

The REIL Learning Observation Instrument (LOI) is the result of a collaborative effort to create a cross-district teacher observation tool to be used as part of a performance-based evaluation system. It is a research-based instrument designed to define effective teaching practices, encourage dialogue about instruction, and support differentiated areas for professional growth. The LOI meets the requirements for Arizona's recent legislation regarding the evaluation process and implementation of a high quality teacher observation instrument. Using the LOI, your assigned evaluator(s) will conduct scheduled observation cycles and provide rubric-based scores five times over the course of the school year.



The LOI is composed of six rubrics which contain specific elements and descriptors. The initial five rubrics are implemented and scored across districts and comprise the observation portion of the REIL score. These rubrics are: Content, Formative Assessment, Instructional Strategies, Learner Engagement, and Learning Community. The sixth rubric, Professional Responsibilities, is scored at the discretion of each district.

Each rubric contains elements specific to identified areas of instructional practice. There are a total of twenty elements scored during one of the three process stages of the observation cycle: pre-conference, observation, and post-conference.

Structure of the Learning Observation Instrument

FORMATIVE ASSESSMENT RUBRIC

Aligns with In-TASC Standard 1 (Learner Development), 5 (Assessment), 7 (Planning for Instruction), and 8 (Instructional Strategies)

The *Formative Assessment* rubric is designed to support teacher understanding and implementation of real-time (during & end-of-lesson) assessment as a strategy to mo[illegible]ner progress and to guide ongoing planning and instruction. Effective teachers use real-time assessments that are at the correct level of difficulty, aligned to standards-based objectives, and engage learners in demonstrating knowledge and skills. In addition, the effective teacher articulates & documents progress that learners have made in relation to the observed lesson objectiv[illegible]

Element	Descriptors					
	[illegible]teria at levels 3, 4, and 5.	Meets criteria at levels 3 and 4.				
Real-Time (during & end-of-lesson) **Assessment** (Pre-Conf. / Observation / Post-Conf.)	Plans appropriate during and end-of-lesson assessment(s) that are designed to elicit the information necessary throughout the lesson in order to adjust instruction at the **individual student level**. (1a, 6a, 6b, 7d, 8b)	Plans appropriate during and end-of-lesson assessment(s) that are designed to elicit the information necessary **throughout the lesson** in order to adjust instruction at **the sub-group level**. (1a, 6a, 6b, 7d, 8b)	**Plans appropriate during and end-of-lesson assessment(s)** (*e.g., student recording, artifacts, monitoring notes, verbal response*) aligned to the lesson objective th[illegible]signed to elicit the inform[illegible]ary to adjust instructio[illegible]**bjective level**. (1a, 6a, 6b, 7d, [illegible]	Plans real-time assessment(s) **aligned to the lesson objective** that are designed to elicit overt responses from students **multiple times** during the lesson. (6a, 6b)	Plans real-time assessment(s) designed to elicit an overt response from students. (6a)	
Student Progress (Pre-Conf. / Observation / Post-Conf.)	Articulates and presents evidence of student progress, relative to rigorous short-term (*e.g., unit, series of lessons*) and long-term (*e.g., end-of-year*) goals in order to guide planning. Presents evidence that **nearly all students (95 -100%)** met the lesson objective. (6c, 6g, 8b)	Articulates and presents evidence of student progress, relative to rigorous short-term (*e.g., unit, series of lessons*) and long-term (e.g., end-of-year) goals in order to guide planning. Presents evidence that **most of the students (75-94%) met the lesson objective.** (6c, 6g, 7f, 8b)	Articulates and presents evidence of student progress to guide planning. Presents evidence that **nearly all students (95-100%)** demonstrate progress (*growth*) **relative to the lesson objective**. (6c)	Articulates student progress; **75% -94%** of students demonstrate progress (*growth*).	Articulates student progress; **less than 75%** of students demonstrate progress (*growth*).	
Correct Level of Difficulty (Pre-Conf. / Observation / Post-Conf.)	Produces evidence that real-time assessments are at the correct level of difficulty at the **individual student level**. (6a)	Produces evidence that real-time assessments are at the correct level of difficulty at the **sub-group level**. (6a)	Produces evidence that real-time assessments are at the correct level of difficulty for more than half of the students, as evidenced by pre/prior assessment(s) **and** student work. (6a)	Produces evidence that real-time assessments are at the correct level of difficulty **for more than half** of the students, **as evidenced by pre/prior assessment(s) or student work**. (6a)	Produces evidence that real-time assessment(s) are at the correct level of difficulty **for less than half** of the students. (6a)	

A. The highlighted gray bar near the top identifies the rubric and cites the InTASC standards. Directly below the gray bar is the "purpose statement" for the rubric.

B. Below the purpose statement you will see a color-coded bar. This bar lists the differentiated performance levels, 0-5. Level 3 represents a "proficient" rating.

C. At the top of the column on the left hand side of the page is the word "element." Each rubric contains several elements. For example, the Formative Assessment Rubric contains the following elements: Real Time Assessment, Student Progress and Correct Level of Difficulty.

D. Each element is defined by descriptors, which describe teacher and student actions.

E. The last component is the setting. In the left hand column, each element connects to a trio of vertical bars titled Pre-Conference, Observation, and Post-Conference. These vertical bars indicate the process stage(s) during the observation cycle in which each element is scored.

Observation Settings

The shaded areas in each rubric reflect the process stage during which each element is scored, also referred to as the setting. For example, in the Content rubric, the task analysis element is scored in both the pre-conference and classroom observation settings, whereas conceptual understanding and connections to content are only scored in the classroom observation setting.

Content			
Pre	Obs	Post	Conceptual Understanding
Pre	Obs	Post	Task Analysis
Pre	Obs	Post	Connections to Content
Pre	Obs	Post	Content Accessibility

Formative Assessment			
Pre	Obs	Post	Real-Time Assessment
Pre	Obs	Post	Student Progress
Pre	Obs	Post	Correct level of Difficulty

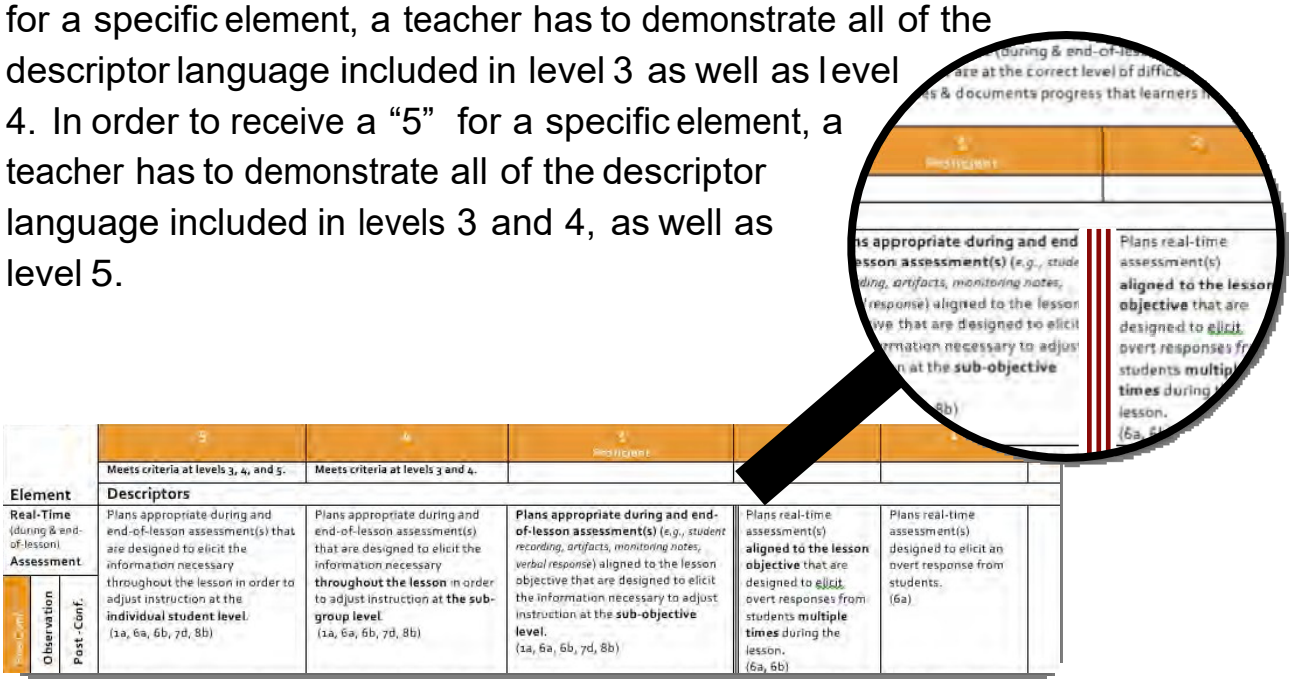
Instructional Strategies			
Pre	Obs	Post	Teacher Role
Pre	Obs	Post	Instructional Approach
Pre	Obs	Post	Practice/Aligned Activity
Pre	Obs	Post	Feedback
Pre	Obs	Post	Monitor and Adjust
Pre	Obs	Post	Analysis of Instruction

The Learner Engagement Rubric			
Pre	Obs	Post	Student-to-Student Interaction
Pre	Obs	Post	Teacher-to-Student Interaction
Pre	Obs	Post	Authentic Engagement
Pre	Obs	Post	Critical Thinking

The Learning Community Rubric			
Pre	Obs	Post	Routines and Procedures
Pre	Obs	Post	Responsibility for Learning
Pre	Obs	Post	Monitoring and Responding to Student Behavior
Pre	Obs	Post	Relationships

Performance Levels

The Learning Observation Instrument contains six performance levels (0-5) that serve to differentiate instructional effectiveness. Level 3 is considered to be proficient. The triple line is used as a visual indicator to signal the relationship that exists between levels 3, 4, and 5. In order to receive a "4" for a specific element, a teacher has to demonstrate all of the descriptor language included in level 3 as well as level 4. In order to receive a "5" for a specific element, a teacher has to demonstrate all of the descriptor language included in levels 3 and 4, as well as level 5.



Element		5	4	3 Proficient	2	1
		Meets criteria at levels 3, 4, and 5.	Meets criteria at levels 3 and 4.			
Element		Descriptors				
Real-Time (during & end-of-lesson) Assessment	Observation / Post-Conf.	Plans appropriate during and end-of-lesson assessment(s) that are designed to elicit the information necessary throughout the lesson in order to adjust instruction at the **individual student level**. (1a, 6a, 6b, 7d, 8b)	Plans appropriate during and end-of-lesson assessment(s) that are designed to elicit the information necessary **throughout the lesson** in order to adjust instruction at **the sub-group level**. (1a, 6a, 6b, 7d, 8b)	**Plans appropriate during and end-of-lesson assessment(s)** (*e.g., student recording, artifacts, monitoring notes, verbal response*) aligned to the lesson objective that are designed to elicit the information necessary to adjust instruction at the **sub-objective level**. (1a, 6a, 6b, 7d, 8b)	Plans real-time assessment(s) **aligned to the lesson objective** that are designed to elicit overt responses from students **multiple times** during the lesson. (6a, 6b)	Plans real-time assessment(s) designed to elicit an overt response from students. (6a)

Educator Goal Plans

Teachers will receive targeted support via an individualized educator goal plan (EGP) that is aligned to the school's year-long professional development plan and to specific individual needs derived from teacher evaluation data (observation scores and student academic progress).

These plans, which will be reviewed annually by the building-level administrator, will be in place beginning in SY 2013-14. Building-level administrators will collaborate with their teachers to develop school- and team-level goals and professional development action plans. The educator goal will have two parts: (1) a student achievement goal in an identified content, and (2) a measurable goal for improved instruction as measured by Learning Observation Instrument element scores.

Performance Improvement Plans

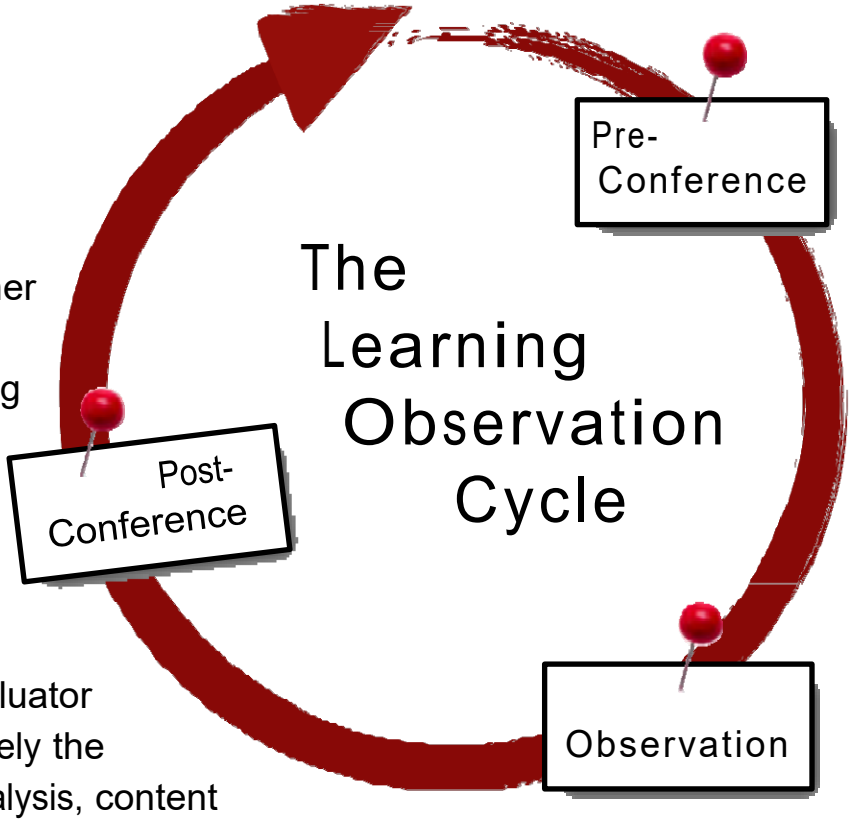
A teacher that needs additional support (as defined by the district and state statute) will be placed on a performance improvement plan. Please refer to your district-specific policy for additional information about the performance improvement plan process.

The Observation Cycle

Cycle Overview

The observation cycle (pre-conference, observation, and post-conference) is an opportunity for teachers and evaluators to have on-going communication regarding instruction five times over the course of the school year. All cycles collectively contribute to the final REIL score.

Pre-Conference



The purpose of the pre-conference is to create a setting in which the teacher articulates the plans and rationale for the upcoming lesson that will be observed by the evaluator, including lesson objectives and expected outcomes. This discussion allows the evaluator to determine how effectively the teacher plans for task-analysis, content accessibility, real-time assessment, and correct level of difficulty. During the pre-conference, the evaluator might script the conversation and ask clarifying questions. The evaluator might also provide feedback regarding the upcoming lesson.

Observation

The observation is an opportunity for the teacher to present a complete lesson as discussed in the pre-conference. The evaluator will observe the lesson within three school days of the pre-conference. During the observation, the evaluator will script the lesson as well as students' responses and actions. The lesson will be scored on the 16 observation elements of the LOI.

Post-Conference

The purpose of the post-conference (30-40 minutes) is to create a setting in which the teacher analyzes the lesson, demonstrates attributes that indicate scores on the post-conference elements, receive a reinforcement and refinement, and review observation and post-conference element scores. The evaluator may ask questions for clarification, review any data and artifacts that are presented, and script the discussion. The evaluator will score two post-conference elements: student progress and analysis of instruction. Additionally, the evaluator will offer a reinforcement and refinement from the observation and discuss other areas of the LOI as needed.

Scheduling Guidelines

Pre-Conference	20-30 minutes	1-3 school days before observation
Observation	One complete lesson	
Post-Conference	30-40 minutes	1-5 school days after observation

Appendix

Related Documents

The Learning Observation Instrument At A Glance ..... Appendix A

Teacher Pre-Conference Form ..... Appendix B

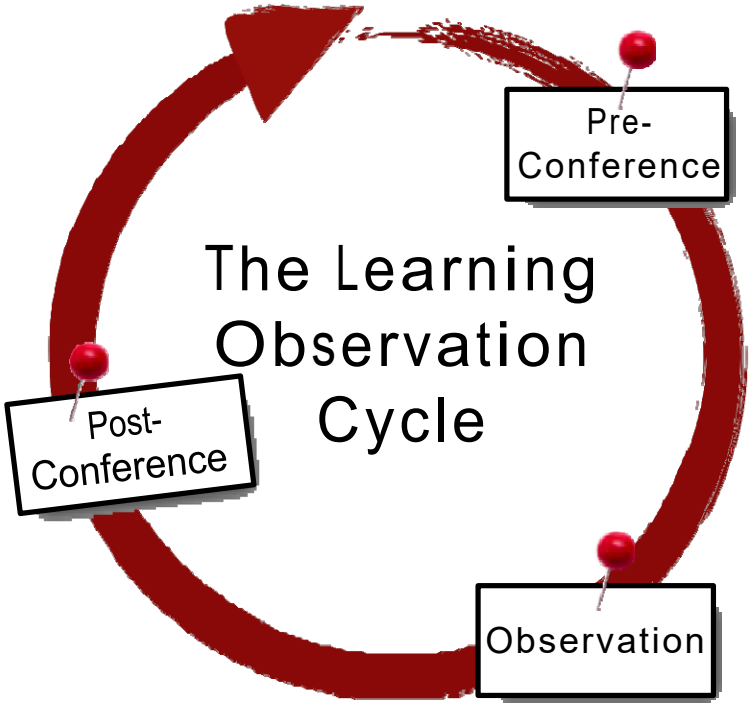
Teacher Post-Conference Form ..... Appendix C

Appendix A

The Learning Observation Instrument At A Glance

The REIL Learning Observation Instrument

At A Glance



The Content Rubric

The Content rubric is designed to support teacher understanding and implementation of effective learning experiences that make content accessible and meaningful for learners to assure mastery of the content. These experiences are facilitated through teacher understanding of how to connect concepts and use differing perspectives to engage learners in critical thinking, creativity, and collaborative problem solving related to authentic local and global issues.

Pre		Post	Conceptual Understanding
		Post	Task Analysis
Pre		Post	Connections to Content
	Obs	Post	Content Accessibility

The Instructional Strategies Rubric

The Instructional Strategies rubric is focused on specific instructional strategies that teachers utilize to ensure learners develop deep understanding of content areas and their connections, and to build skills to apply knowledge in meaningful ways. The teacher varies his/her role in the instructional process (e.g., instructor, facilitator, coach, audience) in relation to the content and purposes of instruction and the needs of learners.

Pre		Post	Teacher Role
Pre		Post	Instructional Approach
Pre		Post	Practice/Aligned Activity
Pre		Post	Feedback
Pre		Post	Monitor and Adjust
Pre	Obs		Analysis of Instruction

The Formative Assessment Rubric

The Formative Assessment rubric is designed to support teacher understanding and implementation of real-time (during & end-of-lesson) assessment as a strategy to monitor learner progress and to guide ongoing planning and instruction. Effective teachers use real-time assessments that are at the correct level of difficulty, aligned to standards-based objectives, and engage learners in demonstrating knowledge and skills. In addition, the effective teacher articulates & documents progress that learners have made in relation to the observed lesson objective.

	Obs	Post	Real-Time Assessment
Pre	Obs		Student Progress
	Obs	Post	Correct level of Difficulty

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The Learner Engagement rubric is designed to support teachers with establishment of classroom environments that support authentic engagement in learning. The effective teacher understands the relationship between motivation and engagement and knows how to design learning experiences using strategies that build learner self-direction and ownership of learning. The teacher collaborates with learners to develop shared values and expectations for rigorous academic discussions, and individual and group responsibility for quality work. Engagement is both student-to-student and teacher-to-student, and is grounded in development of critical thinking skills focused on content specific process skills. This facilitates authentic engagement where students are not just compliant, but can see a connection between the assigned task and the results/outcomes, and that there is clear meaning and personal relevance.

Pre		Post	Student-to-Student Interaction
Pre		Post	Teacher-to-Student Interaction
Pre		Post	Authentic Engagement
Pre		Post	Critical Thinking

The Learning Community Rubric

The Learning Community rubric is designed to support teachers with establishment of a classroom learning environment that supports individual and collaborative learning, and that encourages positive social interaction, active engagement in learning, and self- motivation. The learning environment must motivate student learning through establishing interest, providing choices, making relevant connections, building understanding, assessing learning outcomes, developing close teacher-learner relationships, and creating a sense of belonging between and among learners. The teacher collaborates with learners to develop shared values and expectations for respectful interactions, rigorous academic discussions, and individual and group responsibility for quality work.

Pre		Post	Routines and Procedures
Pre		Post	Responsibility for Learning
Pre		Post	Monitoring and Responding to Student Behavior
Pre		Post	Relationships

The Professional Responsibilities Rubric

The Professional Responsibilities rubric is designed to identify appropriate professional responsibilities in the context of the other rubrics embedded in the Learning Observation Instrument. The effective teacher engages in ongoing professional learning and uses evidence to continually evaluate his/her practice, particularly the effects of his/her choices and actions on others (learners, families, other professionals, and the community), and adapts practice to meet the needs of each learner. The effective teacher seeks appropriate leadership roles and opportunities to take responsibility for student learning, to collaborate with learners, families, colleagues, other school professionals, and community members to ensure learner growth, and to advance the profession.

Engagement in Meaningful and Appropriate Professional Learning Opportunities
Collaboration with Colleagues
Engagement with Families
Leadership

Appendix B

Teacher Pre-Conference Forms

Teacher Pre-Conference Notes

Date: _____ Teacher Name: _____ Evaluator Name: _____

Content – Task Analysis

How have you task analyzed and sequenced the lesson objective?

Be prepared to discuss…	**Be prepared to share…**
• The rationale behind your objective/sub-objectives • The sequence of your lesson (organization of content) • Your plan to teach/facilitate each sub-objective of the lesson • Connection of prior learning to objective/sub-objectives • *Sub-objectives to be taught in this lesson, to show you have anticipated student misconceptions related to background knowledge, vocabulary and/or processes* • *The connection of this lesson and sub-objectives to the overall unit and year-long planning*	• Lesson Plan(s) • Evidence of sub-objectives in your lesson plan • Lesson materials that align to the objective and content standards • Planning materials (ie. pacing guides, curriculum maps, unit plans)

Teacher Notes:

Content – Content Accessibility

How is the content accessible for all students? Share assessment data that determined the modifications you made for the lesson.

Be prepared to discuss…	**Be prepared to share…**
• Your plan for making content accessible to all students • Identified sub-groups • The materials and strategies you will use to scaffold instruction • The evidence and data which determined content accessibility • *Assessment data and relevant literacy data used to plan for sub groups and/or individual students*	• Lesson Plan(s) • Materials and resources • IEPs, ILLPs • Relevant assessment data including formative assessments

Formative Assessment – Real-Time Assessment

What real-time assessments do you plan to use throughout the lesson in order to measure student progress towards your lesson objective? How have you identified your sub-groups of students?

Be prepared to discuss…	**Be prepared to share…**
• The real-time assessments you plan to use at each sub-objective (How do you plan to assess students during and at the end of the lesson?) • The appropriateness of your real-time assessments that allow for an overt response from students during and at the end of the lesson • Your plan to review student responses to the real-time assessments in order to adjust instruction • Identified sub-groups of students • *Assessments that will be used for sub-groups of students* • *Real-time assessments that measure individual student progress towards the lesson sub-objectives*	• Lesson Plan(s) • Evidence of real time assessments in your lesson plan for key sub-objectives • Copies of real-time assessments (if applicable) • Possible monitoring documents (ie. checklist, seating chart)

Formative Assessment – Correct Level of Difficulty

What is your evidence that your real-time assessments are at the correct level of difficulty?

Be prepared to discuss…	**Be prepared to share…**
• Evidence and rationale for the chosen level of difficulty • Pre-assessments and/or prior assessments • Data and student work • *Sub-group considerations regarding level(s) of difficulty* • *Individual student considerations regarding level(s) of difficulty*	• Lesson Plan(s) • Pre/Prior assessments (ie. Formative assessments, summative assessments) • Student work

Teacher Notes:

Appendix C

Teacher Post-Conference Forms

Teacher Post -Conference Notes

Date: _____ Teacher Name:_____ Evaluator Name:_____

Instructional Strategies – Analysis of Instruction

How have you reflected upon your instruction to ensure increased student learning for the next lesson?

Be prepared to discuss…	Be prepared to share…
• The strengths of your lesson • The weaknesses of your lesson • Your next steps based on your student work • *Your next steps for your sub-groups* • *Your long range plans for increasing each student's learning within this content discipline*	• Student work/assessments • Curriculum map/Pacing Guide • Grouping structures

Teacher Notes:

Formative Assessment – Student Progress

How do you know your students made progress and/or mastery toward the lesson objective? Share your evidence and data.

Be prepared to discuss…	Be prepared to share…
• Your data reflecting academic growth towards and/or mastery of the lesson objective • The progress your students have made towards the objective • The percent of students who showed growth • *The percent of students who met the lesson objective* • *How student progress results from this lesson compare to short term and long term student goals*	• Student work/assessments showing growth directly related to this objective • Monitoring documents (ie. Classroom performance sheets, sub-objective checklist)

Teacher Notes

REIL

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REIL Extend
Professional Standards for Leaders Crosswalk

Professional Standards for Educational Leaders (formerly known as the ISLLC Standards)	Leading Observation Instrument Elements
Standard 1. Mission, Vision, and Core Values *Effective educational leaders develop, advocate, and enact a shared mission, vision, and core values of high-quality education and academic success and well-being of each student.*	**Setting & Communicating Direction Rubric** - Shared Purpose **Developing the Organization** - Communication **Securing Accountability Rubric** - Implementation of Strategies
Standard 2. Ethics and Professional Norms *Effective educational leaders act ethically and according to professional norms to promote each student's academic success and well-being.*	**Building Relationships Rubric** - Mutual Trust & Respect - Conflict Facilitation
Standard 3. Equity and Cultural Responsiveness *Effective educational leaders strive for equity of educational opportunity and culturally responsive practices to promote each student's academic success and well-being*	**Building Relationships Rubric** - Mutual Trust & Respect
Standard 4. Curriculum, Instruction, and Assessment *Effective educational leaders develop and support intellectually rigorous and coherent systems of curriculum, instruction, and assessment to promote each student's success and well-being.*	**Setting and Communication Direction Rubric** - CIP: Goal Setting - CIP: Action Plans **Developing the Organization Rubric** - Change Process - Management Systems - Accountability for Goals - Supervision of Written, Taught, & Tested Curriculum
Standard 5. Community of Care and Support for Students *Effective educational leaders cultivate an inclusive, caring and supportive school community that promotes the academic success and well-being of each student.*	**Building Relationships Rubric** - Mutual Trust & Respect **Developing the Organization Rubric** - Communication
Standard 6. Professional Capacity of School Personnel *Effective educational leaders develop the professional capacity and practice of school personnel to promote each student's academic success and well-being.*	**Leading Instruction Rubric** - Observation & Evaluation of Instruction - Pre & Post Conference: Data Gathering - Pre & Post Conference: Reinforcement & Refinement - Professional Development: New Learning - Collaborative Learning Structures - Professional Development: Adjusting Support **Developing the Organization Rubric** - Change Process - Recruitment, Retention, & Succession Planning **Securing Accountability Rubric** - Educator Goal Plans
Standard 7. Professional Community for Teachers and Staff *Effective educational leaders foster a professional community of teachers and other professional staff to*	**Setting & Communicating Direction Rubric** - Shared Purpose **Building Relationships Rubric** - Mutual Trust & Respect

promote each student's academic success and well-being.	**Developing the Organization Rubric** - Change Process - Communication **Leading Instruction Rubric** - Professional Development: New Learning - Collaborative Learning Structures - Professional Development: Adjusting Support **Securing Accountability Rubric** - Accountability for Goals - Supervision of Written, Taught, & Tested Curriculum - Implementation of Strategies - Educator Goal Plans
Standard 8. Meaningful Engagement of Families and Community *Effective educational leaders engage families and the community in meaningful, reciprocal, and mutually beneficial ways to promote each student's academic success and well-being.*	**Setting & Communicating Direction Rubric** - School Resource Management **Building Relationships Rubric** - Accessibility **Developing the Organization Rubric** - Communication
Standard 9. Operations and Management *Effective educational leaders manage school operations and resources to promote each student's academic success and well-being.*	**Setting & Communicating Direction Rubric** - Shared Purpose - School Resource Management **Building Relationships Rubric** - Conflict Facilitation **Developing the Organization Rubric** - Management Systems - Recruitment, Retention, & Succession Planning
Standard 10. School Improvement *Effective educational leaders act as agents of continuous improvement to promote each student's academic success and well-being.*	**Setting and Communication Direction Rubric** - Shared Purpose - CIP: Goal Setting - CIP: Action Plans **Developing the Organization Rubric** - Change Process - Communication - Management Systems - Recruitment, Retention, & Succession Planning **Securing Accountability Rubric** - Accountability for Goals - Supervision of Written, Taught, & Tested Curriculum - Implementation of Strategies - Educator Goal Plans

Human Capital Management System

Current Legislation to Support HCMS Implementation
July 1, 2016

	Description	Implication
ARS §15-203 (A)(38)	The state board of education shall adopt and maintain a model framework for a teacher and principal evaluation instrument that includes quantitative data on student academic progress that accounts for between thirty-three per cent and fifty per cent of the evaluation outcomes.	Supports weighting of the student academic progress portion of the *REIL Score* (50%).
15-537 (E)	The governing board shall prescribe specific procedures for the teacher performance evaluation system including those related to the two actual classroom observations, the specific and reasonable plans for the improvement of teacher performance, appeals for teachers who disagree with the evaluation of their performance, training requirements for qualified evaluators, and the appropriate use of quantitative data of student academic progress in evaluations of all certificated teachers.	
ARS §15-203 (A)(38)	School districts and charter schools shall use an instrument that meets the data requirements established by the state board of education to annually evaluate individual teachers and principals. The state board of education may periodically make adjustments to align the model framework for teacher and principal evaluations with assessment or data changes at the state level.	
ARS §15-241	Establishes a classification system generated from the achievement profiles for schools, based on letter grades.	Schools labeled with a D or F label will receive the designation of *spotlight school*, allowing for specific interventions.
ARS §15-203 (A)(38)	The framework shall include four performance classifications, designated as highly effective, effective, developing and ineffective, and guidelines for school districts and charter schools to use in their evaluation instruments.	This will be used to support the overall effectiveness rating for teachers.

	Description	Implication
	School districts and charter schools shall adopt definitions for the performance classifications adopted by the state board of education in a public meeting and apply the performance classifications to their evaluation instruments in a manner designed to improve principal and teacher performance.	
ARS §15-203 (A)(38)	The state board of education shall adopt best practices for professional development and evaluator training.	
ARS §15-502	A school district shall not adopt policies that provide employment retention priority for teachers based on tenure or seniority.	Employment retention cannot be based solely on tenure or seniority.
ARS §15-537 (B)	The governing board of a school district shall establish a system for the evaluation of the performance of certificated teachers in the school district that results in at least one evaluation of each certificated teacher by a qualified evaluator each school year. The policies shall describe: 1. Incentives for teachers in the highest performance classification, which may include multiyear contracts not to exceed three years. 2. Incentives for teachers in the two highest performance classifications to work at schools that are assigned a letter grade of D or F. 3. Protections for teachers who are transferred to schools that are assigned a letter grade of D or F 4. Protections for teachers if the principal of the school is designated in the lowest performance classification.	Policies mandate incentives for effective and highly effective teachers; REIL-Extend will offer three-year contracts for highly effective teachers accepting a position in a high need school; salary enhancement for effective and highly effective teachers who accept a position in a spotlight school (subset of high-need schools).
ARS §15-538 (C)	Governing boards develop a definition of inadequacy of classroom performance that aligns with the performance classifications.	This statute will assist REIL-Extend with implementation of dismissal policies.
ARS §15-341/ ARS §15-203 (A)(38)	Develop and adopt policies for principal evaluations (to go into effect in 2013-14). The policies shall describe: The principal evaluation instrument, including the four performance classifications; Alignment of professional development opportunities to the principal evaluations; Incentives for	Will support professional development and incentives for effective building level administrators; REIL-Extend will offer 3-year contracts for effective and highly effective building-level administrators accepting a position in a high need school; salary

	Description	Implication
	effective / highly effective principals which may include: multiyear contracts; incentives to work at schools that are assigned a letter grade of D or F; transfer and contract processes for principals designated in the lowest performance classification.	enhancement for effective and highly effective building-level administrators who accept a position in a spotlight school (subset of high-need schools); all building-level administrators will receive annual educator goal plans and job-embedded professional development.
ARS §15-503 / ARS §15-537	Allows a principal and teacher evaluations and performance classification to be shared with other school districts or charter schools for hiring purposes.	This will facilitate recruitment for and placement in high-need schools.
ARS §15-537	Any school district policy pertaining to the transfer of teachers from one school to another shall take into consideration the current distribution of teachers across all of the performance classifications and the needs of the pupils in the school district.	This will facilitate development of policies related to the HCMS strategy of equitable distribution of teachers.
ARS §15-977	Develop 301 plan for 2014-15 that requires an individual teacher's performance on the evaluation be a portion of the performance pay system required by Proposition 301.	Align placement on salary schedule to performance classification.
ARS §15-977 (D)	A performance based compensation system shall include teacher professional development programs that are aligned with the elements of the performance based compensation system.	
ARS §15-537 (C)	By school year 2015-2016, the policies shall describe: Performance improvement plans for teachers designated in the lowest performance classification; dismissal or nonrenewal procedures for teachers who continue to be designated in the lowest performance classification; dismissal policies for teachers who are not provided an intervention option; transfer policies to limit transfer of *ineffective* teachers from one school to another.	Supports development of the HCMS professional development, transfer, and retention and dismissal strategies.
ARS §15-538.01	States a teacher who is beginning his/her 4th year of employment and who is designated in the lowest performance classification shall become a probationary teacher for the subsequent school year and shall remain a probationary teacher until that teacher's performance classification is designated in either of the two highest performance classifications	Assigning a 4th year teacher with an ineffective performance classification a probationary contract as opposed to a "continuing" contract supports the development of the HCMS retention and dismissal policies.

	Description	Implication
ARS §15-977	A school district governing board must adopt a PBCS system to allocate funding from the classroom site fund; beginning in school year 2014-2015, individual teacher performance as measured by the teacher's performance classification shall be a component of the school district's portion of the forty percent allocation for teacher compensation based on performance.	Supports the alignment of the salary schedule to educator effectiveness.

REIL Extend
Human Capital Management System

	Attract	Place	Retain	Sustain
	D E V E L O P Individualized and targeted professional development based on evaluation data.			
	Attracting and acquiring top talent for high-need schools	*Initiating strategic staffing efforts through hiring, selection, and placement practices*	*Retaining top talent in high-need schools*	*Maintaining a highly engaged & effective educator workforce*
Key Strategies	• Strategic compensation (e.g., Flexible initial placement on salary schedule based on effectiveness level) • Communicate about retention stipends • Use of data to inform recruitment decisions (e.g., REIL Score, pre-service training) • Educator support via systematic PD • HR branding • Effective school leadership • Career pathways / Reach Extensions • Job re-design • Communicate expected competencies • Advertise Opportunity Culture Initiative	• Strategic compensation (e.g., reach extensions in spotlight schools) • Use of educator evaluation data to inform staffing decisions • Exemplary hiring practices • Behavior Event Interviews • Priority selection of new hires for high-need schools • Multiple data point hiring process aligned to common vision of instructional improvement • High-need school designation (e.g., spotlight school) • Equitable access to effective teachers • Implementing transfer and protection policies	• Strategic compensation (Differential pay; retention stipends) • Use of educator evaluation data to inform retention decisions • Educator support via individualized educator goal plans • Incentives (e.g., multi-year contracts; career pathway opportunities) • Implementation of high-quality induction and mentoring • Effective school leadership • Build teacher pipeline through aspiring teacher programs • Communicate about resources (e.g., home mortgage/ student loan assistance)	• Strategic compensation (e.g., Reducing gap between initial and peak earnings) • Use of educator evaluation data to inform PD decisions and continuous improvement planning • Educator support via individualized and targeted professional development • Career pathways / reach extensions • Involvement of teachers and administrators in decision-making • Strategic assignment of students • Prioritizing collaborative team-time • Human-centered design activities (e.g., Design Day)

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Potential Obstacles to Implementation: KUSD and NUSD

- CBI Evaluation of Superintendent: The superintendent shall provide each member of the board a copy of the evaluation instrument not later than November 10.
  - Observation instruments to be developed for central office staff that include a superintendent evaluation instrument will need to be completed by October or a policy change would be needed.

- DKB Salary Deductions:
  - Deductions and redirections have been authorized by the board. If salary compensation was awarded upfront and then deducted later if performance was not achieved, then a policy change would be needed.

- GBJ Personnel Records: Materials obtained prior to an employee's employment, such as confidential recommendations or interview notes, will not be available for review by the employee.
  - The policy may need to be amended to include performance task and/or interview notes or ratings as part of promotion or assignment of employees already employed.

- GBK and GBK-R Staff Grievances [Nadaburg]: A grievance is a complaint by a district employee alleging a violation or misinterpretation, as to the employee, of any district policy or regulation that directly and specifically governs the employee's terms and conditions of employment. Terms and conditions of employment mean the hours of employment, the compensation therefor, including fringe benefits, and the employer's personnel policies directly affecting the employee.
  - Because compensation changes in the past have typically only improved salaries for educators, there may be more grievances with a performance-based pay structure.

- GCB Professional Staff Contracts and Compensation: Salaries in the district will be differentiated in relationship to duties and responsibilities.
  - The policy may need to be adjusted to differentiate based on performance as an added criteria.

- GCBA Professional Staff Salary Schedules:
  - Initial placement on salary and advancement on salary schedule vertically and horizontally will need to be adjusted in policy to account for changes in the performance pay model. Denial for advancement and the reasons listed in policy may also need to be adjusted to include performance classifications. District will need to consider revisions to this policy and other related policies as it allows advancement on the salary schedule for completion of professional growth hours, graduate and undergraduate coursework, and timelines for submitting hours for salary advancement.

- GCI Professional Staff Development: The superintendent may establish local in-service training courses for teachers and other certificated employees in the schools, credit for which may be granted beyond the bachelor's degree in the manner that graduate courses in institutions of higher learning are taken into account. This credit may be granted in cases where the scope, level, quality, and content of the local course is equal to college graduate work and the instructor is qualified to teach on the college level.
  - Policy adjustment may be appropriate to allow for credit to be allowed for rigorous training provided by MCESA that is not taught by an instructor qualified to teach at the college level.

- GCK: Professional Staff Assignments and Transfers

Potential Obstacles to Implementation: KUSD and NUSD

o Policy revisions may need to be revised to incorporate proposed HCMS strategies related to the transfer of personnel from one school to another.

- GCO Evaluation of Professional Staff Members: Evaluation of Classroom Teachers.

o The current policy states that the district evaluation instrument will include four performance classifications, designated as highly effective, effective, developing, and ineffective. It also requires that the district will involve its certificated teachers in the development and periodic evaluation of the teacher performance evaluation system. This policy does not need to be changed. It needs to be considered in the project management planning to ensure adherence to policy.

LEA Supporting HCMS Policies

	KUSD	MCRSD	MESD	NUSD	RESD	WESD	INCITO
G-5361 GCO-R Evaluation of Professional Staff Members	√	√	√	√	√	√	√
G-0050 GA Personnel Goals/Priority Objectives	√	√	√	√	√	√	√
G-2050 © GCA Professional Staff Positions	√	√	√	√	√	√	√
G-2200 © GCBA Professional Staff Salary Schedules	√	√	√	√	√	√	√
G-3450 © GCF Professional Staff Hiring	√	√	√	√	√	√	√
G-3463 © GCF-RC Professional Staff Hiring	√	√	√	√	√	√	√
G-4100 © GCI Professional Staff Development	√	√	√	√	√	√	√
G-4500 GCK and G-4511 GCK-R Professional Staff Assignments & Transfers	√	√	√	√	√	√	√
G-5800 © GCQA Reduction in Force	√	√	√	√	√	√	√

Human Resource Alignment

Innovation Configuration Map

MCESA
Maricopa County Education Service Agency

	High Fidelity 1	2	3	Non-Use 4
The LEA...				
Selection	• Utilizes a selection process focused on performance competencies needed to meet the PBCS performance goals. • Utilizes a PBCS that attracts educators who have the competencies to help meet student achievement goals.	• Utilizes a multiple data point hiring system that aligns to performance competencies (LOI, COI, LDOI). • Assesses candidates on the desired performance competencies (e.g., screening process, interview process, portfolio review, reference checks). • Strategically chooses Selection Teams and holds team members accountable for ensuring the success of the final candidate once hired. • Trains selection team members on hiring and selection processes and procedures, and ensures they have a thorough understanding of the performance competencies. • Utilizes the selection process as a professional development opportunity for participating selection team members. • Selects candidates with the highest level of competencies or the highest potential to develop them.	• Strategically chooses selection teams to be as inclusive as possible and requires a commitment from team members to participate in all processes. (BFK). • Trains selection team members on hiring and selection processes and procedures, and includes information on the performance competencies. • Assesses candidates (partially) based on performance competencies (e.g., initial screening, central office or school interviews, reference checks) • Aligns interview questions to competencies. • Utilize a multiple data point hiring system but many not give equal "weight" to all data points. (BFK)	• Utilizes selection teams to identify qualified applicants and make recommendations for hire. • Utilizes hiring process focused heavily on face-to-face interviews.

	High Fidelity 1	2	3	Non-Use 4
The LEA...				
TALENT MANAGEMENT & DEVELOPMENT				
Performance Management	• Ensures evaluators set goals for educators that are compatible with the performance standards or targets in the PBCS. • Ensures the competencies the district evaluates in the performance evaluation process are the same ones that will help educators meet the goals needed to receive PBC.	• Promotes the evaluation process as a vehicle for providing feedback and coaching to all educator groups (e.g., teachers, coaches, building-level administrators) related to the competencies. • Establishes a remediation program for struggling educators; and ensures evaluators focus on helping participants develop and demonstrate the competencies.	• Establishes and implements an educator evaluation system that utilizes frequent observation cycles, and assesses the competencies. • Utilizes evaluators to provide feedback and coaching related to some of the competencies. • Establishes a remediation program for struggling educators; and some evaluators focus on helping them develop and demonstrate the competencies.	• Establishes and implements an educator evaluation system for some or all educator groups. • Utilizes evaluators to provide feedback and coaching that may not be tied to competencies.
Educator Goal Plans				
	• Utilizes individual educator goal plans focused on performance competencies and student academic progress, and ensures action steps will assist educators in increasing the overall effctiveness rating that is aligned to the PBCS.	• Utilizes individual educator goal plans, focused on performance competencies, focused on performance competencies, which include objectives and action steps.	• Utilizes educator goal plans for sub-groups of educators.	• Utilizes improvement plans for ineffective educators.

	High Fidelity 1	2	3	Non-Use 4
The LEA...				
Professional Development	• Ensures PD opportunities are specifically targeted to help educators improve performance in the areas rewarded by the PBCS. • Rewards development of the competencies needed to improve student achievement through the PBCS. • Rewards development of the competencies PD programs focus on through the PBCS.	• Ensures professional development opportunities are available to help educators develop most of the competencies. • Plans professional development utilizing an assessment of the competencies and the findings from this assessment result in directing efforts toward improving weak competencies. • Conducts program evaluation of its professional development to gauge its relevance to the competencies.	• Includes some professional development opportunities to help educators develop many of the educator competencies. • Plans professional development utilizing an assessment of the competencies.	• Implements professional development opportunities that are unaligned to educator competencies.

Note: The content in this IC Map is informed through the work of several organizations/bodies of work, including:

- Batelle for Kids

  - Heneman III, H.G., and Milanowski, A. Strengthening the Educator Workforce Through Human Resource Alignment. Center for Educator Compensation Reform. U.S. Department of Education, Office of Elementary and Secondary Education, Washington, D.C., 2011.

- ERS (Education Resource Strategies):
  - The Teaching Job: Restructuring for Effectiveness

- U.S. Department of Education
  - TIF: Human Capital Management System (HCMS) Self-Assessment (developed by Measurement Incorporated under subcontract to Kratos Learning)

Glossary of Terms

Recruitment: Attracting high-potential candidates to the organization.

Selection: Identifying specific competencies and tools to narrow candidate pool to qualified candidates; repeatedly selecting high-quality candi-

Placement: The strategic placement of educators into classrooms and schools.

Performance Management: Systematically measuring educator performance and planning for district-wide improvement.

Educator Goal Plans: Individualized professional growth plans to support educator development of performance competencies in order to improve student learning

Induction / Mentoring: Specialized professional development support for new educators that focuses on onboarding (socializing new employees into the culture of the organization); establishment and follow-through of orientation activities; feedback; and coaching.

Professional Development: Supporting the growth of educator knowledge, skills, and practices through training, modeling, and coaching.

Strategic Compensation: Aligning organizational goals and strategies to overall rewards.

Performance-Based Compensation: Differential compensation that is earned based on educator effectiveness.

Opportunity Culture

Teacher Job Description

MULTI-CLASSROOM LEADERSHIP

Position: Multi-Classroom Leader

Summary

The multi-classroom leader (MCL) chooses and leads multiple teachers, tutors, and others to meet the leader's standards of excellence. (S)he establishes each team member's roles and goals at least annually, determines how students spend time, and organizes teaching roles to fit each teacher's strengths, content knowledge, and professional development goals. The MCL also teaches students her/himself in most cases. The team uses the leader's methods and tools. The MCL organizes the team to review student progress and change instruction to ensure high-progress learning for every child. The MCL works collaboratively with the team, using the team's new ideas and innovations that the leader agrees may improve learning. The team leader is fully accountable for learning and development of all students taught by her team members. (S)he chooses, evaluates, and develops the team, and dismisses low performers when necessary (in cooperation with the principal).

Responsibilities

Planning and Preparation

* Set high expectations of achievement that are ambitious and measurable for all students taught by team
* Establish methods and create instructional tools and materials that team teachers use in all classrooms
* Set direction, verbally and with tools and materials, that clarify content and teaching process
* Lead team to:
  - plan backward to align all lessons, activities, and assessments
  - design instruction that is enriched (developing higher-order thinking skills) and personalized (reflecting learning levels and interests of individual students)
  - design assessments that accurately assess student progress

Classroom Environment

* Lead team to:
  - hold students accountable for high expectations of behavior and engagement that are ambitious and measurable
  - create physical classroom environments conducive to collaborative and individual learning
  - establish a culture of respect, enthusiasm, and rapport

Instruction

* Lead team to:
  - hold students accountable for ambitious, measurable standards of academic achievement
  - identify and address individual students' social, emotional, and behavioral learning needs and barriers
  - identify and address individual students' development of organizational and time-management skills
  - invest students in their learning using a variety of influence techniques
  - incorporate questioning and discussion in student learning
  - incorporate small-group and individual instruction to personalize and tailor instruction to individual needs
  - monitor and analyze student assessment data to inform enriched instruction by teacher
  - communicate with students and keep them informed of their progress

Professional Responsibilities

* Solicit and eagerly receive feedback from supervisor and team members to improve professional skills
* Lead team to maintain regular communication with families, and work collaboratively with them to design learning both at home and at school, and to encourage a home life conducive to learning success
* Organize and schedule team time to ensure alignment of instructional vision and delivery in all classrooms, and to troubleshoot students' persistent learning challenges
* Determine how students spend instructional time based on instructional skills and content knowledge of teachers in team
* Allocate instructional process elements (lesson planning, large-group instruction, small-group instruction, individual interventions, data analysis, grading, etc.) among team of teachers based on teacher strengths, content knowledge, and professional development goals
* Allocate noninstructional administrative duties among team of teachers
* Model instructional tasks to aid team development
* Clarify and adjust team members' roles and provide feedback, developmental advice, and assignments to develop their effectiveness
* Evaluate team members for potential role changes, and for increasing job opportunities for team teachers who are ready to advance (to new or more complex roles)
* Work with principal to dismiss team members who do not meet the leader's standard
* Participate in professional development opportunities at school

Qualifications

* Knowledge of subject matter being taught
* Bachelor's degree
* Valid teaching certificate (optional, depending on school context and legal requirements)
* Prior evidence of high-progress student outcomes in the relevant subjects (in the top 25% compared to other teachers in a state or on national tests) or, at entry level, evidence of superior prior academic achievements, and organizing and influence skills indicating very high potential to perform at this level. Entry-level teacher works under close supervision of a high-progress teacher until similar student gains have been demonstrated
* Experience successfully leading and managing a team of adults to accomplish goals

Hours

* Full-time position
* Teacher-leader has built-in planning and collaboration times to complete administrative tasks, analyze data, plan instruction, and manage the team

Pay

* Competitive pay for an excellent teacher dependent upon funding, plus benefits and opportunities for pay raises. Pay also varies based on the number of students reached successfully. Potential team and individual bonuses.

Reports to: Principal or chief academic officer

These are the critical competencies a candidate for this position should have.

Multi-Classroom Leader—Critical Competencies

Critical Competency	Definition
Achievement (ACH)	The drive and actions to set challenging goals and reach a high standard of performance despite barriers.
Monitoring and Directiveness (M&D)	The drive and actions to set clear expectations and hold others accountable for performance.
Planning Ahead (PLA)	A bias toward planning in order to reach goals and avoid problems.
Impact and Influence (I&I)	Acting with the purpose of influencing what other people think and do.
Teamwork (TMW)	The ability and actions needed to work with others to achieve shared goals.
Developing Others (DO)	Influence with the specific intent to increase the short- and long-term effectiveness of another person.
Flexibility (FL)	The ability to adapt one's approach to the requirements of a situation and to change tactics.

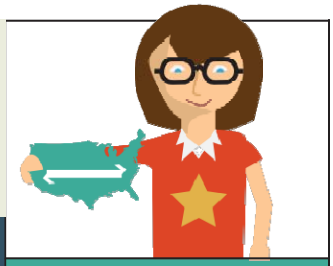
For an explanation of these competencies and how they are used in selection, please visit this webpage.

Summer Day 1	1.1 Defining the MCL Role	Define roles and responsibilities for MCLs; use their job descriptions to define key high-impact activities; define how all school leadership positions work together.	75 min
Summer Day 1	1.2 Launching Leadership	Explore steps to building an effective team by setting group norms for collaborative interaction.	80 min
Summer Day 1	1.3 School and District Support for MCLs	Learn about establishing norms for sharing leadership with administrative teams, and supports needed to succeed.	95 min
Summer Day 2	2.1 Reviewing Instructional Practices	Develop a process for reviewing team teachers' instructional practices, and build coaching skills to improve instruction.	75 min
Summer Day 2	2.2 Delivering Effective Feedback	Learn how to deliver effective feedback to team teachers, examine mindsets that affect team teacher's receptivity to feedback, and approach teachers who have fixed mindsets.	100 min
Summer Day 2	2.3 Leading Effective Coaching Conversations	Examine effective coaching, learn about the "GROW" model, and role-play to receive feedback on coaching.	80 min
Summer Day 2	2.4 Co-Teaching and Modeling	Explore key high-impact methods of co-teaching and modeling to develop team teachers' skills.	65 min
Summer Day 3	3.1 Situational Leadership	Learn how to use Hersey-Blanchard framework to diagnose team teachers' needs and tailor leadership and development styles accordingly.	60 min
Summer Day 3	3.2 Building Effective Working Relationships	Explore five influence styles to use in strengthening working relationships.	60 min
Summer Day 3	3.3 Leading Difficult Conversations	Use past experiences of difficult conversations, and learn how to assess team teachers to prepare for difficult conversations.	75 min
Summer Day 3	3.4 Time and Stress Management	Explore how to manage time and stress to maintain effectiveness and meet responsibilities.	90 min
Summer Day 3	3.5 90 Day Entry Plan	Create SMART goals for success in first 90 days as teacher-leader, including strategies for quick wins and adjustments.	85 min
September	4.1 Collaborative Team Building	Learn how to assess a team's collaborative culture in its early days and address and cultivate effective team norms.	105 min
October	5.1 Directive Coaching	Practice coaching skills with fellow MCLs and conduct brainstorming exercises, building on tactics from Situational Leadership session.	95 min
November	6.1 Maintaining a Successful Team	Celebrate successes and make adjustments to 90-day entry plan and goals.	110 min
December	7.1 Management 360	Learn about managing team relationships from all angles.	60 min
January	8.1 Difficult Conversations Part 2	Learn more about leading difficult conversations, reviewing/receiving help with challenging cases from first half of school year.	70 min
May	9.1 Year in Review	Reflect and review the year's accomplishments, provide feedback to partners, their schools, and the district; make end-of-year and summer plans.	90 min

RECRUITING IN AN OPPORTUNITY CULTURE

LESSONS LEARNED

vignette



WINTER 2015

? Watch: In this brief video, district leaders and principals share how an Opportunity Culture is attracting teachers to previously hard-to-staff schools.

Lessons Learned:

? Recruit Early: Start by March, at least

? Clearly Communicate the Advantages of an Opportunity Culture:

- ✔ Helping more students
- ✔ Career advancement and leadership while staying in the classroom
- ✔ High levels of team collaboration
- ✔ Daily on-the-job learning and feedback
- ✔ Higher pay

? Ask teachers to share the Opportunity Culture concepts: As word spreads, great teachers attract more great teachers

? Repeat, repeat: You can't overcommunicate. Use social media, webinars, videos, partner organizations to spread the word, and invest plenty of leadership time to recruit throughout the U.S.

When districts get ready to recruit excellent teachers for the career possibilities that Opportunity Culture roles offer, success may come down to two actions: Start early, and communicate constantly, say recruiters in Charlotte-Mecklenburg's Project L.I.F.T. schools.

Project L.I.F.T. is a public-private partnership to improve academics at historically low-performing, high-need schools in western Charlotte, N.C. In 2013, its first year of Opportunity Culture implementation at four schools, L.I.F.T. received a remarkable 708 applications for just 19 Opportunity Culture teaching jobs. In prior years, some L.I.F.T. schools saw many positions go unfilled.

But better yet, said Dan Swartz, L.I.F.T.'s human capital strategies specialist, were the second-year results. In 2014, not only did he get more than 800 applications for 27 new Opportunity Culture positions, but the quality of those applicants also soared.

In 2013, of the 708 applications, only 80 candidates made it past the initial phase of a stringent four-part screening process. But in spring 2014, of the 800-plus applications, 145 passed the first phase—roughly a 50 percent increase in quality candidates, Swartz said.

"The candidates we had to choose from when we were hiring—the caliber of those candidates was so much higher than you would typically see," said Katherine Bonasera, principal of Allenbrook Elementary School.

Recruitment worked so well, L.I.F.T.'s leaders say, because they had a great, complete Opportunity Culture package to offer: career advancement opportunities without leaving teaching, higher pay, and meaningful professional development specific to each teacher's role. (See "What Teachers Get in an Opportunity Culture," page 2.)

Denise Watts, superintendent of the Project L.I.F.T. Learning Community, says strong recruiting efforts created a bonus pipeline of teachers eager for the next Opportunity Culture opening.

"Opportunity Culture provides this hybrid position where teachers can have student impact and move the profession in a new and better way with teachers like them, and the teachers they're coaching as well. When you put all that together, this creates an ideal position," said Denise Watts, superintendent of the Project L.I.F.T. Learning Community. "Teachers know what they want, but they never saw it all packaged before. Opportunity Culture gave them the words to describe what they wanted, and no one in the nation was doing that."

With such great jobs to offer, Watts was not surprised by the interest teachers showed in the new roles, but she was surprised by the volume of applications. "I was very pleased," she said. "I was certain teachers would flock to this...because the entire teaching profession is hungry for different pathways and opportunities to stay in the field without leaving the classroom."

Additionally, by the end of the screening process, Swartz had 65 very strong candidates for those 27 new positions—creating a pipeline of teachers to fill non-Opportunity Culture roles as well. About 10 teachers were willing to take those jobs, he said, because they wanted to get a foot in the door to an Opportunity Culture position.

"It's a hard sell when you're crushing their dreams of this [Opportunity Culture] role, and selling them something that's a year down the road and not even a guarantee," he said. But after a year of implementation, prospective candidates—especially new teachers who knew they may not yet be strong enough for Opportunity Culture roles—could fully grasp how good an Opportunity Culture job could be for their future.

what teachers get in an opportunity culture

In an Opportunity Culture, schools extend the reach of excellent teachers and their teams to more students, for more pay, within budget. (In L.I.F.T. schools, multi-classroom leaders can earn supplements of $23,000—50 percent above average teacher pay in North Carolina. Teachers in other advanced roles earn supplements of up to $9,800, or 21 percent above the average.) Each school creates a design team of teachers and administrators that selects and adapts job models to fit their school best, such as:

? Multi-Classroom Leadership: An excellent teacher—the MCL, or multi-classroom leader—reaches more students by continuing to teach while leading a team of teachers who use the MCL's methods and tools. Accountable for the learning results of all the students reached by the teaching team, the MCL earns more—through the school's regular budget, not temporary grants. By co-teaching, co-planning, and coaching, the MCL provides the high level of on-the-job feedback and collaboration teachers consistently report wanting.

"I see it in educators that their energy, what recharges them regularly, are the students, so to get this opportunity where you're not just dealing with adults but with students, too, gets your batteries recharged," Dan Swartz said.

? Time-Technology Swaps: Teachers use digital instruction for limited, age-appropriate periods (as little as an hour daily), freeing a teacher's time while students learn online to teach more students, plan, and collaborate with peers. Some teachers do time swaps without technology—called expanded impact teachers in Charlotte schools—rotating students between personalized, enriched instruction with the teacher and offline skills practice and projects under a paraprofessional's supervision.

? Specialization: Elementary teachers can specialize in their best subjects or roles, with paraprofessional support saving time for teamwork and reaching more students.

All the roles offer the sort of development teachers want, Denise Watts said.

"What I've heard teachers talk about more than anything was the opportunity to be developed in a different way than ever before," she said. "You will be coached and taught how to coach other teachers. Teacher-leaders need to be developed because the skill set they need is different from another teacher. A blended-learning teacher needs to be developed differently. That differentiated development resonates."

"A lot of those teachers came not getting the positions they wanted, but knowing they were coming to a place with a position like that down the road," Watts said, noting that by 2015–16, seven of the nine Project L.I.F.T. schools will be implementing an Opportunity Culture. "This begins to strengthen the general teaching base as well."

The numbers are especially remarkable, she noted, given that all L.I.F.T. schools were labeled as "hard to staff": For the two Opportunity Culture years, L.I.F.T. has started the school years with fewer than five vacancies total, a number that might previously have been true per school.

Recruiting Right: Start Early, Explain Often

"We started recruiting early in the spring for the last two years—that's an important piece," Swartz said. "Everything I read said by May 1st, the best teachers will have already secured positions."

In 2014, Swartz posted positions and began receiving resumes on March 26. And after a year of Opportunity Culture implementation, he could better explain those positions.

"Districts need to start early, and communicate as much detail as possible about the roles," he said.

And, he said, communicate those details as often as possible through current Opportunity Culture teachers.

Especially when Opportunity Culture positions are new, districts should have teachers from their school design teams explain what they have learned about an Opportunity Culture and why it excites them.

"Teachers can sell people on the job much better than I can or a principal can," Watts said. "[Swartz] really leveraged teachers to be a mechanism to entice other teachers."

And districts should use current teachers as sounding boards, explaining the new roles to them and asking what they don't understand, to refine their messages to prospective applicants.

Dan Swartz, L.I.F.T.'s human capital strategies specialist, recommends enlisting current Opportunity Culture teachers to spread the word about the benefits of their Opportunity Culture roles.

"You have to really try to communicate what teachers would want to know—a lot of times it's not what's in the job description," Swartz said. "It's explaining it all—the pay, clearly defining what this means for their career, defining what this opportunity is. It seems dumb to say but it's really important if they don't understand in what ways it's an opportunity—because it's more than just higher pay."

Swartz used social media, weekly webinars, videos, contacts with L.I.F.T.'s partner organizations, and contacts within schools of education to get the word out about the openings. Districts should set aside plenty of leadership time for this to ensure the ability to recruit through the U.S. "You can't overcommunicate what this is about, and what the benefits are," Swartz said.

"If you advertise it the right way and you market it the right way for your school district, you're going to get great candidates from all over the country that will be interested in it," said Janette McIver, principal at Thomasboro Academy. "The people who are in schools and are doing the rock-star jobs are the people who are also looking to do something more, all the time...so they're seeking out opportunities like this."

And the final benefit for the district? The combination of the great Opportunity Culture roles plus a rigorous selection process led to a statistic Swartz is happy to share: Although the schools rearranged some roles after the first year, only one Opportunity Culture teacher sought another position elsewhere in the district. Three other teachers did not stay in Opportunity Culture roles, but of the teachers L.I.F.T. wanted to retain in Opportunity Culture roles, 95 percent remain.

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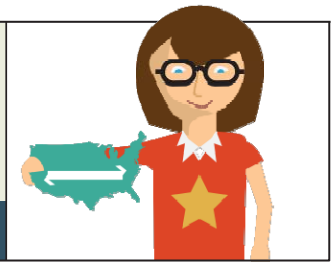
building an opportunity culture for america's teachers

PUBLIC IMPACT

METROPOLITAN NASHVILLE'S INNOVATION ZONE

HIGH-NEED SCHOOLS HELP TEACHER-LEADERS WITH PAID, YEARLONG STUDENT TEACHERS

an opportunity culture case study



Reach Model in Use

- Multi-Classroom Leadership

Fact File

- Innovation Zone (iZone) created in 2011 for Metropolitan Nashville's high-need, low-performing schools
- Three of the 10 iZone schools were selected to implement Opportunity Culture models in 2013–14 to extend the reach of excellent teachers and their teams
- "Aspiring teacher" positions created at Opportunity Culture schools, paying student teachers for a full year in the classroom, where they learn and serve on a teaching team
- Aspiring teachers earn $10.52 per hour, or nearly $15,860, and receive benefits, plus the opportunity to have an early shot at full-time jobs at the end of their year. In contrast, typical student teaching is unpaid and lasts much less than a year.

summary

In Metropolitan Nashville Public Schools (MNPS), three persistently low-performing schools started 2013–14 with a plan: Redesign teachers' jobs to extend the reach of their best teachers to more students, and lift the achievement of these high-need schools. These schools had ranked in the state's bottom 5 percent on state assessments in the three years leading up to 2011.

In 2012–13, at Buena Vista Elementary, just 7.5 percent of tested students were rated as "proficient or advanced" in English language arts (ELA), and just 15 percent in math. At Bailey STEM Magnet Middle, that percentage was only 12 percent in math and 17 percent in ELA, and at Robert Churchwell Museum Magnet Elementary, just 19 percent of tested students were at least proficient in each subject.

Leaders of Nashville's new Innovation Zone (iZone), created to help low-performing, high-need schools, considered ways to turn these three iZone schools around, and settled on piloting the job-redesign concepts of Public Impact's Opportunity Culture initiative. These concepts call for schools to extend the reach of excellent teachers and their teams to more students, for more pay, within regular budgets, providing enhanced time for collaboration and on-the-job learning at school. Each school creates a school design team of teachers and administrators charged with selecting and adapting the Opportunity Culture job models that best fit their school.

All three schools—Buena Vista, Bailey STEM, and Robert Churchwell—chose to move from their one-teacher-one-classroom model to the Multi-Classroom Leadership model. Under this model, an excellent teacher—the multi-classroom leader, or MCL—reaches more students with excellent instruction by continuing to teach while leading a team of teachers who use the leader's methods and tools. Accountable for the learning results of all the students reached by his or her teaching team, the MCL earns more—through the school's regular budget, not through temporary grants. Redesigning jobs for higher pay without relying on grant funding ensures that these positions can be paid more for the long term, not just temporarily.

Then the schools added a twist: a yearlong, paid student teaching position. Aimed at increasing the pipeline of great teachers and putting another adult in every classroom, the aspiring teachers program placed 33 master's degree candidates in these three schools.

The district worked with teacher preparation programs at three universities that expressed interest in the aspiring teachers program—Lipscomb, Vanderbilt, and Trevecca Nazarene—to create a program similar to Tennessee's state internship program. Under the state program, education students at the University of Tennessee at Knoxville go through a yearlong student teaching internship as "fifth-year undergraduates," which is much longer than the other universities' typical student teaching.

This study provides a snapshot of the impetus for creating the aspiring teachers program and its first months of implementation, based on interviews with aspiring teachers and iZone leaders and principals.

creating a great-teacher pipeline, supporting instruction

iZone leaders created the aspiring teachers program to serve several needs. They wanted to focus on recruiting and retaining great teachers, and they intended for the aspiring teacher role to serve as a stepping stone to becoming a full-time teacher in these high-need schools, where first-year teachers often struggle. They wanted to continue to develop their current teachers' skills: As aspiring teachers train under an excellent MCL, the other teachers on the MCL's team can develop leadership skills themselves by providing frequent feedback to the aspiring teachers.

The leaders also wanted another adult in the classroom who could assist in instruction in a personalized learning environment, all the while learning from a great teacher.

In addition, principals saw a strong need to have more adults in the building to help with small-group instruction. An external review of instruction in one iZone school found that it had high-quality small-group instruction, but suffered from frequent distractions during small-group time as teachers monitored and redirected other students in the room. The school thus sought to provide better support for the time students spend working independently in "learning centers" while protecting teachers' time in small-group and direct instruction.

The schools also wanted to help their adults build relationships with their students, who often come from unstable environments.

Aspiring teachers such as Laura Laufman at Bailey STEM Magnet Middle School support their teams while receiving intensive, on-the-job development.

"At Bailey STEM Middle, the original idea behind aspiring teachers was grounded in a focus on behaviors and culture," says Derek Richey, director of operational innovation at MNPS, so that aspiring teachers could help serve as "camp counselors" or "learning advisors" to build and sustain relationships with students.

Principals at the three schools worked closely with Richey to figure out how best to fit aspiring teachers into their Multi-Classroom Leadership model.

high expectations, many duties for aspiring teachers

Aspiring teachers work within MCL teams, providing support to the MCL and the MCL's team teachers, and learning and developing with the MCL's guidance.

The aspiring teacher commits to working 176 days, or 35 weeks, during the school year, far longer than the typical student teacher placement of about 15 weeks. By state statute, student teachers must serve 75 days, and they often work in different schools during that time. Aspiring teachers, however, work in the same school throughout the year, generally serving the same class during that time.

Aspiring teachers stay with students throughout the day; their jobs involve supporting the team teachers with all aspects of teaching, including small-group instruction; online learning; and supervising students during meals, transitions, and recess.

In 2013–14, of the 33 aspiring teachers hired, 28 were students in a teacher preparation program; the remaining five were paraprofessionals already working at the school, such as teaching assistants or a permanent substitute teacher.

hiring and evaluating aspiring teachers

Richey reports that recruiting aspiring teachers proved fairly easy because the pay and strong training were seen as an attractive alternative to traditional student teaching.

In recruiting education students to apply for aspiring teacher positions, MNPS emphasized to them the value of the yearlong position when they searched for their first jobs after graduation. Richey took principals with him to recruit at area universities, holding information sessions with master's degree candidates.

a different student teaching model

Nashville's aspiring teacher position aimed to:

- ? Build a pipeline of great teachers prepared for the challenges of high-need schools.
- ? Improve and increase personalized instruction.
- ? Develop current teachers' leadership skills.
- ? Provide more opportunities for meaningful student-teacher relationships.

The program targets students in master's degree programs with the expectation that they would have more flexible course schedules (often taking night and weekend classes) and potentially a higher level of preparedness if they were changing careers.

A third-grade aspiring teacher sees the program as ideal for older students or those changing careers, adding, "I thought this was a great opportunity. I'm 29 and was worried about having to do unpaid student teaching."

Richey did the initial screening of applications, sending groups of applicants to each school in an attempt to keep each university's cohorts together. The hiring principal and mentor teachers interviewed prospective aspiring teachers and, in some cases, observed them during a structured interaction with students. Not all the applicants Richey sent were hired. The schools worked to pair aspiring and team teachers well, and found that a good "pairing" strategy was important to the success of the teams. After they were hired, aspiring teachers then participated in two weeks of school-based professional development led by their MCLs and the teachers on their teams before the school year began.

Compensation

MNPS hires aspiring teachers as district employees, paying them $10.52 per hour for about 1,500 hours of work in the 10-month position, or nearly $15,800, and offering them benefits, plus the promise of having first shots at full-time jobs at the end of their year.

Depending on the number of aspiring teachers hired, the salaries represent approximately 6 percent to 11 percent of a principal's budget, if aspiring teachers are used schoolwide. This portion of the budget is funded by using aspiring teachers to replace vacant teaching or other staff positions within each school, resulting in overall savings that also fund higher pay for MCLs.

Supporting and Evaluating Aspiring Teachers

As the program began, iZone leaders and principals saw evaluation as a way to support and develop aspiring teachers. Schools are asked to use a modified teacher evaluation with a formal rubric. Aspiring teachers are ultimately accountable to their MCLs, who in turn are accountable for the outcomes of all students served by the teaching team. Aspiring teachers receive support from a mentor teacher at the school—generally the MCL, but occasionally also an assistant principal—and a university supervisor. Informal mentoring also occurs daily from team teachers who provide feedback and support on the job.

A mentor teacher's duties include working directly with both the aspiring teacher and university supervisor as a team, developing a plan for sharing instructional and student support responsibilities, providing regular feedback, and completing a university-provided evaluation at the midpoint and the end of each semester.

The university supervisor's duties include conducting at least 25 hours of supervision and mentoring and five formal evaluations per semester. The supervisors are responsible for responding to weekly journal submissions from the aspiring teachers, as well as providing regular feedback on planning, assessment, classroom management, and teaching.

team teachers, aspiring teachers see powerful benefits

"Honestly, there's no way if I just student-taught I'd be ready for a classroom right away," a fourth-grade aspiring teacher says—an opinion voiced by many aspiring teachers. "I was able to see the way to introduce the students to the classroom. You see how students gain, through data and as they grow. You see the whole experience of the school. I need to be in the middle of it to learn. It's more beneficial to see 'Oh, this is what kids need.'"

The benefits go both ways, according to both team teachers and MCLs. They say that the extra adult to lead small groups matters greatly, and training a future teacher puts a bit of pressure on the team to "up its game."

"If an aspiring teacher is trying to learn from me, I want to always be doing my best instruction," a third-grade team teacher explains. "I don't want to let them down." This teacher explains that working with both an MCL and an aspiring teacher creates a circle of learning:

> Having an aspiring teacher who's looking to me for direction, and also having an MCL who is checking my standards, holds me more accountable. It's nice, because there were times last year where I felt like, "I don't know how to do this or how to teach this." For example, one time this year, my kids were struggling to understand the theme of a text. My MCL came in the next day and modeled a lesson to my whole class for me. It was so helpful for me, for the aspiring teacher, and for the kids.

Moreover, most aspiring teachers report feeling like a full member of their teaching teams, with responsibility to lead small groups from the beginning and increasing responsibility to lead a class as the school year progresses. At one school, for example, an aspiring teacher covers a class while the rest of her team attends a

at a glance: breaking down one aspiring teacher's job

A typical breakdown of duties for one first-grade aspiring teacher included the following:

- Much small-group instruction: "Every day I do a small-group rotation—I see all 18 of them [the students under my team teacher] every day, all day—for about four hours."
- Daily feedback and coaching: "[It occurs] every day, with either the MCL or a [team] teacher."
- Consistent planning and collaboration time: "We have some type of planning meeting or collaborating three days a week, about an hour each."
- Noninstructional duties: "In noninstructional time, I'm preparing lessons, making copies ... I also take kids to specials. My team teacher and I also both eat with the students every day—to build a caring relationship."

schoolwide meeting to analyze student learning data. This aspiring teacher creates and executes her own lesson plan.

A third-grade teacher describes other benefits of the model:

> When I first heard about the [MCL] model, I thought, "I don't want a million adults in my classroom if it's not purposeful." There's me, my aspiring teacher, [others such as specials teachers and special education teachers], sometimes the MCL—it's a lot of adults, but it's nice, actually. Our kids need that extra attention and individualized, more targeted instruction. At the beginning, they were a little confused: "We have two teachers?" They didn't know, at first, that they had to listen to the aspiring teacher. Now we've straightened it out. And with aspiring teachers getting more comfortable, it's hard to tell from the outside who the lead is and who the aspiring teacher is.

The potential for better student outcomes is the driver and ultimate goal of this staffing model. "We will work to establish how to evaluate this initiative," Richey says. "We know it needs to be rigorous."

resolving challenges for future expansion

Creating the aspiring teacher program at the same time as the schools piloted Multi-Classroom Leadership put many changes on teachers' shoulders as they adjusted to the team-teaching model and the planning, collaboration, and coaching time it required. Although most of that change was welcomed, teachers identified the following challenges, which the district is working to address.

Creating a Committed Cohort of Aspiring Teachers

In the first month of the school year, one school dealt with four aspiring teachers quitting their jobs, which school and iZone leaders attributed to a lack of fit with a turnaround school culture and the demands of working in a high-need school.

One of the first-grade teachers stresses that commitment is crucial for the students, saying that her students took it personally when their aspiring teacher quit. "They kept talking about the previous aspiring teacher...; the kids took it hard, like daddy walking out. We are the consistency to their inconsistency outside these doors."

Ensuring That MCLs and Team Teachers Have Time to Train Aspiring Teachers

Another first-grade team teacher says she first focused on the notion of having extra help, rather than how much she would have to teach an aspiring teacher.

> When you thought about extra help, you didn't think about also teaching that person. And you can't teach "with-it-ness." Understanding the way to ask a child something is important—having the aspiring teacher understand the demographic and culture of the school [matters].

Early feedback from MCLs suggests they continue to try to find enough time to spend with their aspiring teachers. In practice, aspiring teachers receive a great deal of mentoring from the other teachers on their teams as well.

Making Time for Aspiring Teachers to Experience All Forms of Teaching

Aspiring teachers say the focus on small-group instruction limits the time spent observing other team members teaching. "In student teaching, you get to watch a lot," a first-grade aspiring teacher says. "Here, I don't get to watch guided reading because I have to teach a different group. I wish I could do more of that."

After her year as an aspiring teacher at Buena Vista Elementary, Jayme Hubbell was offered a job as a kindergarten lead teacher. Watch her in a video here.

In addition, some aspiring teachers work in several classrooms, making it more difficult for team teachers to train them and evaluate their instruction.

The teams were unclear about who may lead the class when the teacher of record is out. Over time, the aspiring teacher may take over the class instead of a substitute, but that remains unclear or up to individual schools. (Aspiring teachers are themselves eligible for substitutes when they miss work.)

Aligning Support for Aspiring Teachers

Aspiring teachers get varying levels of observation, feedback, and coaching support from their universities. Some team teachers and MCLs reported too little direct communication between themselves and the university mentors.

expanding the aspiring teachers program

Although the first year of recruiting resulted in many applications—nearly 100 in a three-week window—Richey says that MNPS expects a broader and even stronger pool of candidates in coming years for aspiring teacher positions because they provide such a leg up in landing a regular job in the district. He believes that more applicants will allow for greater selectivity in the future.

Richey points out that expanding the pipeline to other district and iZone schools also would create a more predictable way to find teachers. He says the district may open the program to undergraduate education programs.

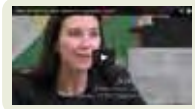
In addition, Richey explains, MNPS wants to use the aspiring teachers program to improve relationships with teacher preparation programs and to ensure that candidates come into the teacher pool fully prepared. "We could make this the primary pipeline for getting into MNPS schools—how we hire all of our first-year teachers into Metro schools. We hire maybe 500 to 600 teachers a year, and we may never get to that point, but you could see 50 to 100 teachers hired out of this pipeline."

Learn More about the Innovation Zone

Metro Nashville Innovation Zone
Public Impact on MNPS Opportunity Culture initiative
3 Nashville Schools Create Paid Student Teacher Role

news report:
More Money Given to the Best Teachers to Train Their Peers

videos:


Nashville Multi-Classroom Leaders

Nashville Team Teachers

Nashville Principals

Learn More about Extending the Reach of Excellent Teachers and Creating an Opportunity Culture

for an overview:
visit ☞ www.OpportunityCulture.org
view ☞ our infographic

for more on the model used in this example:
visit ☞ Multi-Classroom Leadership

Let Us Know if Your School Is Extending Reach and Creating an Opportunity Culture

contact ☞ Public Impact using the Opportunity Culture feedback form, or e-mail us at opportunitycultureinput@publicimpact.com.

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building an opportunity culture for america's teachers

PUBLIC IMPACT

Professional Development

LEARNING

The Learning Series courses for professional learning are aligned to Learning Observation elements and effective implementation of AZ Content Standards. Each course can be delivered through on-line video modules available for any time access or face-to face either directly to teachers or through a trainer-of-trainer model. Implementation guides and MCESA coaching services are also available to support principals in facilitating successful professional learning for their teachers.

Learning Observation Instrument Overview - 3 hrs
By the end of the workshop, participants will know and understand the purpose, components, structure, and process of the Learning Observation Instrument, and gain a basic understanding of the six rubrics. Evidence of proficiency will be a written summary of the structure and purpose of the Learning Observation Instrument.

All Rubrics and Elements

Foundations of Instruction: Objective Writing - 2 hrs (ELA, Mathematics, and/or Science)
By the end of the module, participants will select an appropriate content and process skill for objective writing that is at the correct level of difficulty. Evidence of proficiency will be a clearly written lesson objective at the application level or above, including an observable verb and specific content, and the evidence of learning that aligns with student learning needs.

LOI Elements: Task Analysis, Correct Level of Difficulty, Real-Time Assessment, and Critical Thinking

Foundations of Instruction: Lesson Design - 2 hrs (ELA, Mathematics, and/or Science)
By the end of the module, participants will write a lesson plan with aligned sub-objectives and real-time assessments, and identify the components of an effective lesson. Evidence of proficiency will be a clearly written evidence of learning with aligned sub-objectives, teacher actions, student actions, real-time assessments for each sub objective, and necessary modifications for each sub objective.

LOI Elements: Real-Time Assessment, Task Analysis, Modeling or Constructing, Practice/Aligned Activity, and Critical Thinking

Supporting Teaching of the Standards Through Task Analysis - 3 hrs
By the end of this module, participants will formulate a shared understanding of Task Analysis in the Pre-conference and Observation settings with a particular emphasis on unit and year-long planning. Participants will identify strategies for addressing student misconceptions. Evidence of proficiency will be a completed graphic organizer that includes examples that support Task Analysis in both Pre-conference and Observation settings.

LOI Elements: Task Analysis, Monitor and Adjust, and Critical Thinking

Teacher Actions: Modeling - 2 hrs
By the end of this module, participants will be able to identify when a model is needed and create an appropriate and effective model based on the needs of the students. Evidence of proficiency will be a written example of a metacognitive model.

LOI Elements: Teacher Role, Instructional Approach, and Practice/Aligned Activity

Guided Practice and Check for Understanding - 2 hrs
By the end of this module, participants will design a student action aligned to a sub-objective that will provide the student an opportunity to practice the learning and the teacher with learning evidence to effectively check for understanding. Evidence of proficiency will be clearly written student actions aligned to task-analyzed sub-objectives.

LOI Elements: Teacher Role, Instructional Approach, Practice/Aligned Activity, and Real-Time Assessment

Teacher Actions: Constructing Knowledge Part One - 2 hrs
By the end of part one of this module, participants will analyze components of a constructed experience and justify when to use constructing. Evidence of proficiency will be an analysis of an existing lesson plan and a written justification of when to use constructing knowledge at the sub-objective level.

LOI Elements: Teacher Role, Instructional Approach, and Practice/Aligned Activity

Teacher Actions: Constructing Knowledge Part Two - 2 hrs
By the end of part two of this module, participants will identify appropriate lessons to use constructed experiences and will plan a lesson using constructed experiences. Participants will design effective strategies to solidify learning in a constructed experience. Evidence of proficiency will be a lesson plan that includes the experience, guiding questions, and assessment of learning.

LOI Elements: Teacher Role, Instructional Approach, and Practice/Aligned Activity

Using Formative Assessment for Instructional Decision Making - 2 hrs
By the end of this module, participants will engage in multiple strategies to assess students at the correct level of difficulty both during and at the end of a lesson, to monitor learner progress and guide ongoing planning and instruction. The module is differentiated for participants based on a variety of DOK understandings. Evidence of proficiency will be written differentiated assessments for learners at the sub group and individual level.

LOI Elements: Real-Time Assessment, Student Progress, Correct Level of Difficulty, and Critical Thinking

Using Formative Assessment to Monitor and Adjust Instruction - 2 hrs
By the end of this module, participants will be able to evaluate and adjust instruction for content, cognition, and pedagogy. Evidence of proficiency will be a written response justifying the decision to move forward with or adjust instruction.

LOI Elements: Conceptual Understanding, Task Analysis, Real-Time Assessment, Practice/Aligned Activity, Monitor and Adjust, Correct Level of Difficulty, Feedback, and Content Accessibility

Supporting Teaching the Standards through Learner Engagement- 2 hrs
By the end of this module, participants will understand the vocabulary, rationale and application of the elements in the Learner Engagement Rubric with a particular emphasis on Critical Thinking. Participants will distinguish between cognitive and compliant engagement. Evidence of proficiency will be a written clarification statement that demonstrates new understanding for each element in the Learner Engagement Rubric.

LOI Elements: Student-to-Student Interaction, Teacher-to-Student Interaction, Authentic Engagement, and Critical Thinking

Critical Thinking Mindset: (online module)
Participants will have a clear understanding of student mindsets: growth and fixed. Participants will be able to identify students within their own classrooms who have a growth mindset or a fixed mindset.

LOI Elements: Routines and Procedures, Responsibility for Learning, Relationships

Critical Thinking Teaching the Growth Mindset: (online module)
Participants will learn how to teach growth mindset. Participants will be able to identify ways to teach growth mindset in their own classrooms; Participants will be able to identify the best resources to support growth mindset in their classrooms; Participants will be able to embed growth mindset practices into their lesson plans.

LOI Elements: Routines and Procedures, Responsibility for Learning, Instructional Approach, Critical Thinking

My Educator Goal Plan: (online module)
All educator groups will explore philosophy and rationale for developing their educator goal plan in collaboration with their building administrator and/or district administrator. Including how to craft goals and action steps in order to increase proficiency in content and instructional pedagogy using the LOI, COI, and LDOI.

LOI Elements: Engagement in Meaningful and Appropriate Professional Learning Opportunities, Collaboration with Colleagues, Leadership

Going Deeper with Student to Student Engagement – 3 hours
Participants will learn how to integrate discourse structures within the classroom that move students to higher level conversations including developing justifications and drawing from diverse perspectives to demonstrate deeper extended learning.

LOI Elements: Critical Thinking, Student to Student Interaction, Authentic Engagement

The Work of Collaborative Teams- 3 hours
Participants will learn to apply norms of collaboration, and working agreements while actively participating as a team member to analyze data, look at student work, and participate in the development of common formative assessments.

LOI Elements: Engagement in Meaningful and Appropriate Professional Learning Opportunities, Collaboration with Colleagues, Leadership, Content Accessibility

Element Specific Videos Matched to Observational Data- (self-paced online modules) The Learning Management System provides educators an opportunity to locate aligned professional development matched to the specific proficiency levels of their annual evaluation scores. This is accomplished through the viewing of focused video clips showing educators modeling a higher level of proficiency.

All Rubrics and Elements

Routines and Procedures- 3 hours
Participants will learn specific strategies to implement in their classrooms that will support students in utilizing routines and procedures to maximize instructional time.

LOI Elements: Routines and Procedures, Responsibility for Learning, Monitoring and Responding to Student Behavior, Relationships

Responsibility for Learning & Relationships -3 hours
Participants will learn strategies to apply collaboration with their learners to develop shared values and expectations for respectful interactions and group responsibility for quality work.

LOI Elements: Routines and Procedures, Responsibility for Learning, Monitoring and Responding to Student Behavior, Relationships

Monitoring and Responding to Student Behavior- 3 hours
Participants will learn strategies to use verbal and non-verbal cues in ways that demonstrate respect and conveys that reason for the appropriate behavior in order to develop a collaborative community.

LOI Elements: Routines and Procedures, Responsibility for Learning, Monitoring and Responding to Student Behavior, Relationships

COACHING

The Coaching Series consists of courses for professional learning aligned to Coaching Observation Instrument elements and effective implementation of AZ Content Standards. Each course can be delivered face-to face either directly to coaches or through a trainer-of-trainer model. MCESA coaching services are also available to support principals in facilitating successful professional learning for their coaches.

Coaching Observation Instrument Overview - 3 hours
By the end of the workshop, participants will know and understand the purpose, components, structure, and process of the Coaching Observation Instrument, and gain a basic understanding of the three rubrics. Evidence of proficiency will be a written summary of the structure and purpose of the Coaching Observation Instrument.

All Rubrics and Elements

Setting a Foundation for Coaching: Building Coaching Relationships - 5 hours
By the end of the workshop, participants will understand ways trusting relationships, and listening skills impact coaching and professional relationships. Evidence of proficiency will be a written action plan to advance professional relationships with teachers that includes a goal, timeline, and record of progress/results.

COI Elements: Relationships and Active Listening

Setting a Foundation for Coaching: Coaching Skills - 6 hours
By the end of the workshop, participants will understand that paraphrasing, and questioning skills are essential skills for effective coaching and group collaboration. Evidence of proficiency will be a written action plan to increase coaching conversation skills that includes a goal, timeline, and record of progress/results.

COI Elements: Relationships, Collaboration, and Goal Orientation

Setting a Foundation for Coaching: The Principal-Coach Partnership - 7 hours
By the end of the module, participants will understand the benefits a Principal-Coach Partnership Agreement has on the work of a coach and school culture. Evidence of proficiency will be written plan for implementation of a Principal-Coach Partnership Agreement conversation.

COI Elements: Relationships, Collaboration,

Learning Observation Instrument Overview - 3 hours
By the end of the module, participants will know and understand the purpose, components, structure, and process of the Learning Observation Instrument, and gain a basic understanding of the six rubrics from a formative, coaching point of view. Evidence of proficiency will be written look-for's for essential rubric elements.

All Rubrics and Elements

Goal Driven Collaboration: Designing Coaching Support – 7 hours
By the end of the module, participants will be able to use a protocol and apply strategies for designing support in order to improve teacher effectiveness and student achievement. Evidence of proficiency will be a completed student needs analysis, instructional analysis, and instructional plan.

COI Elements: Student Needs Analysis, Instructional Analysis, Instructional Planning, Coaching Plans, Goal Orientation, and Relationships

Goal Driven Collaboration: Coaching Cycles - 6 hours
By the end of the module, participants will know and understand the essential considerations of each stage of a coaching cycle. Evidence of proficiency will be a written action plan for implementation of an effective coaching cycle.

COI Elements: Adjusting Support, Coaching Plans, Results, and Relationships

Supporting Teachers along the LOI Continuum - 6 hours
Evidence of proficiency will be a self-analysis of an instructional conference roll-play script.

COI Elements: Post-Conference: Data Gathering, Post-Conference: Reinforcement & Refinement, Conference Process

The Collaborative Team Meeting - 6 hours
Participants will learn how to synthesize all of the elements within the collaborative team setting while modeling effective facilitation focusing on student learning.

COI Elements: Active Listening, Collaboration, Goal Orientation, Students Needs Analysis, Instructional Analysis, Instructional Planning, Research, Standards Implementation, and Group Facilitation

Instructional Conferencing 1.0 (6 hours)
Instructional Conferencing participants will learn how to utilize highly effective post-conferencing skills to reinforce and refine LOI elements identified by a teacher as (s)he reflects, analyzes, demonstrates, and articulates levels of proficiency.

COI Elements: Relationships, Post Conference: Data Gathering, Post Conference: Reinforcement & Refinement, Conference Process

Instructional Conferencing 2.0 (6 hours)
This workshop will provide participants the opportunity to enhance skills for both direct teaching conferences and cognitive coaching conferences. Participants will plan, conduct and receive feedback for each type of conference, and will leave with more reflective questions and teaching models aligned to the Learning Observation Instrument elements.

COI Elements: Relationships, Post Conference: Data Gathering, Post Conference: Reinforcement & Refinement, Conference Process, Instructional Analysis

What's my Role in the Leadership Team? (3 hours)
Participants will apply learning from Designing Coaching Support and Coaching Cycles courses to demonstrate and communicate proven results within a site-based leadership team setting.

COI Elements: Adjusting Support, Coaching Plans, Results,

Educator Goal Plans: What's my Role?
Participants will learn effective strategies for distributing coaching support across the school site in regards to sub-groups determined by teacher educator goal plans.

COI Elements: Adjusting Support, Coaching Plans, Goal Orientation

Instructional Delivery - 6 hours
Participants will utilize elements contained within the Learning Observation Instrument to plan and facilitate effective learning experiences through delivery of professional development.

COI Elements: Task Analysis, Conceptual Understanding, Instructional Approach, Practice/Aligned Activity, Authentic Engagement, Monitor and Adjust, and Professional Development: New Learning

LEADING

The Leading Series consists of courses for professional learning aligned to the Leading Observation Instrument elements and effective implementation of the Professional Standards for Educational Leaders. Each course can be delivered through on-line video modules available for any time access or face-to face either directly to leaders or through a trainer-of-trainer model. Implementation guides and MCESA coaching services are also available to support in facilitating successful professional learning for leaders.

Getting Ready: Framing/Data (6 hours)
Participants will define data question(s) aligned to a targeted topic (i.e. - reading, STEM, student achievement, PBIS, intervention, school culture, attendance)

LdOI Elements: CIP: Goal Setting, CIP: Action Plans, Accountability for Goals

Data Analysis (6 hours)
Participants will analyze current data to develop a theory of action including potential benchmarks for monitoring effectiveness.

LdOI Elements: CIP: Goal Setting, CIP: Action Plans, Accountability for Goals

Vision (6 hours)
Participants will strengthen their vision through the creation of a public narrative to engage members of the school community and garner support for a change initiative.

LdOI Elements: Shared Purpose, Communication, CIP: Goal Setting, CIP: Action Plans

Strategic Conversations (6 hours)
Participants will identify stakeholders key to the success of the change initiative and plan strategic conversations for both supporting and opposing influences.

LdOI Elements: Change Process, Mutual Trust and Respect, Conflict Facilitation, Communication

Systems Thinking (6 hours)
Participants will understand the basics of systems thinking and be able to use systems thinking to create change within the school.

LdOI Elements: Change Process, School Resource Management, Management Systems

High Functioning Teams (6 hours)
Participant will build skills of the school leadership team and increase their leadership team's ability to influence the effectiveness of other leaders and teams on their campus.

LdOI Elements: Collaborative Learning Structures, Accountability for Goals, Group Facilitation

Action Planning (6 hours)
Participants will develop an action plan for implementation of their change initiative specific to professional development, including thinking through benchmarks and monitoring structures.

LdOI Elements: Supervision of Written, Taught, and Tested Curriculum; Accountability for Goals, Implementation of Strategies, Educator Goal Plans

Distributive Leadership (6 hours)
Participants will explore strategies effective in increasing distributed leadership and building capacity to support a change initiative.

LdOI Elements: Professional Development: Adjusting Support; Recruitment, Retention, & Succession Planning

Understanding Resistance (6 hours)
Participants will create a plan to implement strategies for managing resistance to change and adjusting support.

LdOI Elements: Change Process, Mutual Trust and Respect, Conflict Facilitation

Sustainability (6 hours)
Participants will use systems thinking, resiliency, and healthy leading to ensure sustainability of their change initiative.

LdOI Elements: Change Process, Communication, Management Systems

Supervision of Written, Taught, and Tested Curriculum (3 hours)
Participants will explain how the SWTTC element helps to support a CIP; Participants will use criteria to either create, or refine existing method for gathering and organizing walk-through data; Participants will develop a system for monitoring and documenting the work and progress toward school goals.

LdOI Elements: Supervision of Written, Taught, and Tested Curriculum; Accountability for Goals, Implementation of Strategies, Educator Goal Plans

Educator Goal Plan Results: (3 hours)
This workshop will focus on the components of an educator goal plan, the establishment of the goal plan, and the annual revision process. In addition, building-level administrators will grapple with how to support the individual development of the teaching staff through the goal plan process and identify how the plan connects to teacher and school development as a whole. Participants will engage in multiple strategies to assess critical components such as, Student Achievement Goal, Rubric (LOI) Elements, Description of support, Resources, Frequency of support, Evidence.

LdOI Elements: Educator Goal Plans, Observation & Evaluation of Instruction, Professional Development: New Learning, Professional Development: Adjusting Support

Qualified Evaluator Training (LOI, COI, LDOI): (3-5 days)
Participants will (1) Describe the structure and content of each rubric, performance level, and descriptor. (2) Accurately record, and analyze evidence from pre-conference, observation, and post-conference. (3) Establish inter-rater agreement in a controlled setting. By the end of the workshop, participants will gain the knowledge necessary to conduct two formal observation, by understanding how the scoring process works.

All Rubrics and Elements

Certified Evaluator Training: (3-5 days job embedded) (LOI, COI, LdOI)
Participants will establish inter-rater reliability between evaluators during in-class/school observations; observation of pre-and post-conferences with teachers and principals; evaluation of growth plans; and evaluation of student academic progress.

All Rubrics and Elements

Observation Instrument Booster: (2-4 days) (LOI, COI, LdOI)
This training may serve as a follow up using the CEA as a needs assessment for each leader. Participants will review common rater errors, recalibrate scoring on descriptors, receive advanced feedback on analysis of scripts, and review critical components of pre and post conferencing.

All Rubrics and Elements

Instructional Conferencing 1.0 (6 hours)
Instructional Conferencing participants will learn how to utilize highly effective post-conferencing skills to reinforce and refine LOI elements identified by a teacher as (s)he reflects, analyzes, demonstrates, and articulates levels of proficiency.

LdOI Elements: Observation & Evaluation of Instruction, Pre & Post Conference: Data Gathering, Post Conference: Reinforcement & Refinement

Instructional Conferencing 2.0 (6 hours)
This workshop will provide participants the opportunity to enhance skills for both direct teaching conferences and cognitive coaching conferences. Participants will plan, conduct and receive feedback for each type of conference, and will leave with more reflective questions and teaching models aligned to the Learning Observation Instrument elements.

LdOI Elements: Observation & Evaluation of Instruction, Pre & Post Conference: Data Gathering, Post Conference: Reinforcement & Refinement, Professional Development: Adjusting Support

PLC's for Leaders: Growing Effective PLC's (6 hours)
Participants will analyze present levels of PLC effectiveness and create a differentiated plan to increase proficiency.

LdOI Elements: Professional Development: Adjusting Support, Collaborative Learning Structures

A Closer Look at Educator Goal Plans:
Information for Teachers

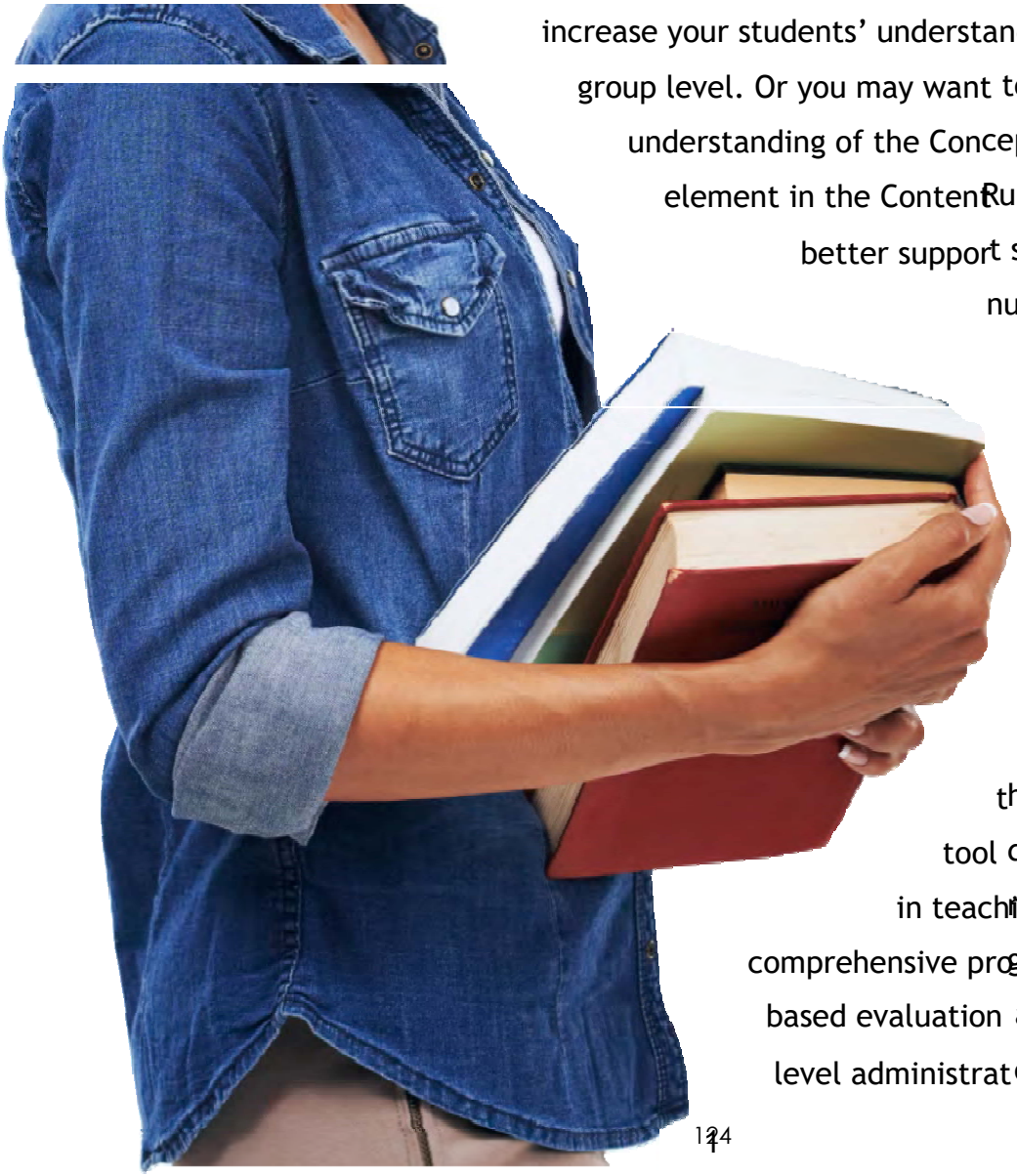
A description of Educator Goal Plans for REIL and REIL-TNG Alliance Partners

REIL is an initiative of

MCESA
Maricopa County Education Service Agency

Educator Goal Plan Overview

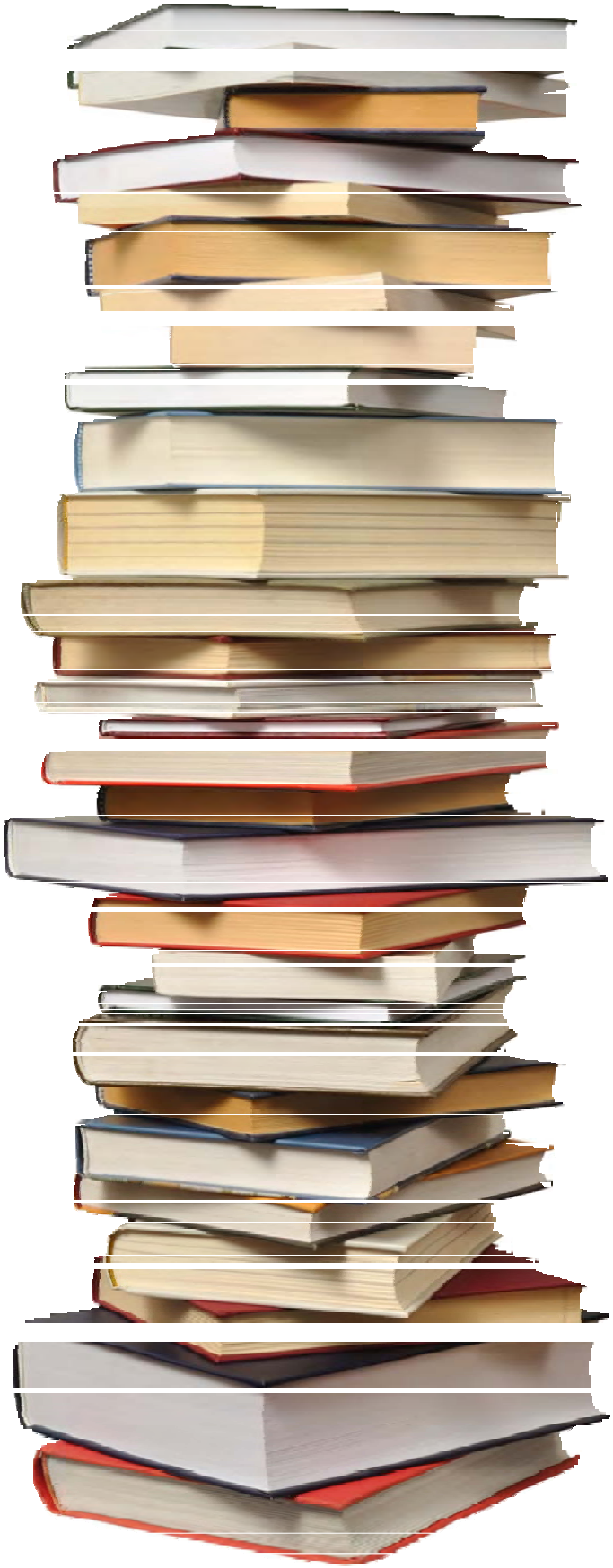
It's all about you! This is your time to enhance your classroom practice in alignment with your evaluation results. As a participant in the Rewarding Excellence in Instruction and Leadership (REIL) program, you may have received your very first performance classification and are looking forward to moving across the REIL Score continuum in the years to come. As an individual professional, you have strengths and opportunities for growth that are different from those of your colleagues. For example, you may be looking forward to moving into the "4" range on the Monitor & Adjust element of the Instructional Strategies rubric in order to increase your students' understanding of content at the sub-group level. Or you may want to gain a better understanding of the Conceptual Understanding element in the Content Rubric so that you can better support student understanding of number sense concepts in mathematics. This is where the Educator Goal Plan (EGP) comes in. As opposed to a performance improvement plan that is specifically designed for a struggling teacher, the EGP is a revolutionary tool designed to develop talent in teaching through a sustainable, comprehensive program of performance-based evaluation and support. Your building-level administrator will be talking to you



soon about this exciting development and he/she will collaborate with you to create an individualized EGP just for you. Through the EGP, you will have the opportunity to focus on a specific goal and receive differentiated support aligned to the Learning Observation Instrument (LOI) and an identified content area.

Other education professionals will also take part in the EGP process, including master educators, instructional coaches, and building-level administrators. The collaborative goal-setting process and the aligned action plans in the areas of planning, instruction, and student learning will ensure you and your colleagues focus on meaningful professional learning experiences that have the best chance for positively impacting student learning.

Imagine a future where you are able to identify an area of classroom practice to dig into, consistently apply your learning in the classroom and receive feedback on your efforts – and then see the reward via increased student learning. That is the power of the EGP!



The Goal

Get ready to participate in one of the most impactful experiences you will have as a teacher!

Goal-setting is a powerful means to focus on an instructional practice in order to facilitate increased student learning. How many times have you sat in a required staff development workshop that didn't meet your specific needs? With an established educator goal, you will be able to take charge of your growth as a teacher in alignment with needs identified through the evaluation process (educator observations and student growth results).

The educator goal has two parts: (1) a student learning component in an identified content area that supports the school's continuous improvement plan, and (2) identified element or elements from the Learning Observation Instrument that will provide an instructional focus for meeting student learning outcomes.

Sample Goal

By October, 2014, Lauren Kingman will show increased proficiency in the ability to plan and deliver instruction in the element of Monitor & Adjust as evidenced by improved element scores and improved student achievement in the content area of reading as evidenced by improved assessment scores on district benchmark assessments.

The Action Plan

Job-Embedded Professional Learning

You will be supported in achieving your educator goal through the personalized action plan component of the Educator Goal Plan. Each EGP includes an action plan in the areas that get at the heart and soul of teaching - planning, instruction, and student learning. Your action plans will contain specific objectives aligned to these three areas, and the steps you will take to help you successfully meet the objectives. For example, Lauren Kingman's goal speaks to the element Monitor & Adjust from the Instructional Strategies rubric. Lauren's action plan includes an objective to plan possible adjustments to comprehension lessons using informational print in order to prepare for extensions or sub-group interventions within the lesson. Her action steps include items such as: (1) Attend Monitor & Adjust workshop; (2) Analyze data to anticipate students who may have misconceptions; (3) Plan checks for understanding to monitor learning during the lesson; and (4) Plan a lesson one-on-one with grade-level team leader.

Support Team Member

You are not alone!

Action plans will also identify a support team member who will be charged with assisting you on your EGP journey. This could be a building-level administrator, a teacher leader such as an instructional coach or Master Educator, or other personnel. Your support team member will provide feedback on your progress and help you understand how to demonstrate that your objectives have been completed. Remember, the action plan is designed to provide differentiated support and job-embedded professional development to all educators. Ensuring educators have the right amount of support is a critical component of that plan.

Frequently Asked Questions

1 Who writes the educator goal?

The educator goal is written by the building-level administrator in collaboration with the teacher.

2 How does an element get selected for my educator goal?

Observation results, including element scores and reinforcements and refinements, will be analyzed to determine appropriate elements of focus for a specific educator. It may not be the lowest scored element from the observation process that is identified. Some elements are foundational to other elements, or work well to implement in the classroom when paired with another element. The idea is to identify an area that is meaningful to you – and that will benefit your student learning results, in alignment with your school's continuous improvement process.

3 How is a content area selected for my goal?

Your building level administrator will spend time studying district initiatives, your school goals, and your specific student achievement data. Together, you will craft your EGP based on the analysis.

4 Will my goal be the same as other teachers at my school?

Since all teachers at your school share the same Continuous Improvement Plan, it is highly likely that your goal may be similar to another teacher's goal. Your building-level administrators will analyze common goal areas in order to inform the year-long professional development plan and to leverage existing resources for cohorts of teachers with similar goals.

5 What happens if I meet my goal mid-year?

Educator goals are meant to be year-long in order to provide meaningful focus and attention that leads to implementation and institutionalization of agreed-upon instructional practices in the classroom . Teachers will have many

opportunities over the course of the school year to demonstrate progress during the observation and evaluation process. Demonstration of progress as well as consistent implementation of practice is important in gauging mastery of the goal. It is possible that the action plan portion of an EGP can be adjusted in order to account for additional needs relative to progress toward the goal.

6 What happens if I don't meet my goal?

Your building-level administrator/support team member will assist you in carrying out your action plan steps so that you can successfully reach your goal. Your action plan can be modified in order to provide greater support or better alignment of resources. If you are unable to meet your goal, you will work with your building-level administrator to determine if you should continue working on that goal the following school-year.

7 Can my peer evaluator help me with my EGP?

While Peer Evaluators are not the primary support for EGPs, teachers may choose to apprise their Peer Evaluator of their EGP goals and Action Plans. Furthermore, districts/LEAs may enlist the help of Peer Evaluators to create and deliver professional development and specific support aligned to EGP goals.

8 Who has access to my Educator Goal Plan?

Your building-level administrators will have access to your EGP in the Observation Data Capture Tool (ODCT) Component of the REILize Decision Support System (RDSS). There are some additional features that will be rolled out in the near future in ODCT that will allow you and your identified support team member to document progress toward goal mastery.

9 Where can I get more information on Educator Goal Plans?

More information about Educator Goal Plans can be found under the Support tab at www.mcesa.az.gov.

REIL

A Closer Look at Educator Goal Plans:
Information for Coaches

A description of Educator Goal Plans for REIL and REIL-TNG Alliance Partners

REIL is an initiative of

MCESA
Maricopa County Education Service Agency

Educator Goal Plan Overview

It's all about you! This is your time to enhance your leadership/coaching practices in alignment with your evaluation results. As a participant in the Rewarding Excellence in Instruction and Leadership (REIL) program, you may have received your very first performance classification and are looking forward to moving across the REIL Score continuum in the years to come. As an individual professional, you have strengths and opportunities for growth that are different from those of your colleagues. For example, you may be looking forward to moving into the "3" range on the Post-Conference: Reinforcement & Refinement element of the Implementing Professional Learning rubric in order to increase your ability to provide feedback by building on teacher comments to transition to the reinforcement and refinement during the post-conference. This is where the Educator Goal Plan (EGP) comes in. The EGP is a revolutionary tool designed to develop talent in leading/coaching through a sustainable, comprehensive program of performance-based evaluation and support. Your evaluator will be talking to you soon about this exciting development and he/she will collaborate with you to create an individualized EGP just for you. Through the EGP, you will have the opportunity to focus on a specific goal and receive differentiated support aligned to the Coaching Observation Instrument (LdOI) and an identified content area.

Imagine a future where you are able to identify an area of coaching practice to dig into, consistently apply your learning in the work you do with teachers, and receive feedback on your efforts – and then see the reward via increased teacher growth and student learning. That is the

The Goal

Get ready to participate in one of the most impactful experiences you will have as a coach!

Goal-setting is a powerful means to focus on a coaching practice in order to facilitate increased teacher growth and student learning. How many times have you sat in a required staff development workshop that didn't meet your specific needs? With an established educator goal, you will be able to take charge of your growth as a coach in alignment with needs identified through the evaluation process (educator observations and student growth results).

The educator goal has two parts: (1) a student learning component in an identified content area that supports the school's continuous improvement plan, and (2) identified element or elements from the Coaching Observation Instrument that will provide an instructional focus for meeting student learning outcomes.

Sample Goal

By October, 2014, Lauren Kingman will show increased proficiency in the ability to lead school improvement efforts in *Designing Support: Instructional Analysis* as evidenced by improved element scores and improved student achievement in the content area of *reading* as evidenced by improved assessment scores on district benchmark assessments.

The Action Plan

Job-Embedded Professional Learning

You will be supported in achieving your educator goal through the personalized action plan component of the Educator Goal Plan. Each EGP includes an action plan in the areas that get at the heart and soul of coaching - Planning, Implementing, and Progress Monitoring. Your action plans will contain specific objectives aligned to these three areas, and the steps you will take to help you successfully meet the objectives. For example, Lauren Kingman's goal speaks to the element *Instructional Analysis* from the *Designing Support* rubric. Lauren's action plan includes an objective to create engaging questions for the interpretation of the relationship between student data, teacher content knowledge, and teacher actions. Her action steps include items such as: (1) Reviewing data sources and brainstorming possible questions; and (2) Discussing at least two relevant articles on data reflection.

Support Team Member

You are not alone!

Action plans will also identify a support team member who will be charged with assisting you on your EGP journey. This could be a building-level administrator, a central office staff member, or other appropriate personnel. Your support team member will provide feedback on your progress and help you understand how to demonstrate that your objectives have been completed.

Remember, the action plan is designed to provide differentiated support and job-embedded professional development to all educators. Ensuring educators have the right amount of support is a critical component of that plan.

Frequently Asked Questions

1. **Who writes the educator goal?**
The educator goal is written by the building-level administrator or immediate supervisor in collaboration with the coach.

2. **How does an element get selected for my educator goal?**
Observation results, including element scores and reinforcements and refinements, will be analyzed to determine appropriate elements of focus. It may not be the lowest scored element from the observation process that is identified. Some elements are foundational to other elements, or work well to implement in the chosen setting when paired with another element. The idea is to identify an area that is meaningful to you – and that will benefit student learning results in alignment with your school's continuous improvement process.

3. **How is a content area selected for my goal?**
Your building level administrator or immediate supervisor will spend time studying district initiatives, your school goals, and site student achievement data. Together, you will craft your EGP based on the analysis.

4. **What happens if I meet my goal mid-year?**
Educator goals are meant to be year-long in order to provide meaningful focus and attention that leads to implementation and institutionalization of agreed-upon instructional practices. Coaches will have many opportunities over the course of the school year to demonstrate progress during the observation and evaluation process.

5. **What happens if I meet my goal mid-year?**
Demonstration of progress as well as consistent implementation of practice is important in gauging mastery of the goal. It is possible that the action plan portion of an EGP can be adjusted in order to account for additional needs relative to progress toward the goal.

6 **What happens if I don't meet my goal?**

Your building-level administrator/support team member will assist you in carrying out your action plan steps so that you can successfully reach your goal. Your action plan can be modified in order to provide greater support or better alignment of resources. If you are unable to meet your goal, you will work with your building-level administrator or immediate supervisor to determine if you should continue working on that goal the following school-year.

7 **Who has access to my Educator Goal Plan?**

Your building-level administrators or immediate supervisor will have access to your EGP in the Observation Data Capture Tool (ODCT) Component of the REILize Decision Support System (RDSS). There are some additional features that will be rolled out in the near future in ODCT that will allow you and your identified support team member to document progress toward goal mastery.

8 **Where can I get more information on Educator Goal Plans?**

More information about Educator Goal Plans can be found under the Support tab at www.mcesa.az.gov.

REIL

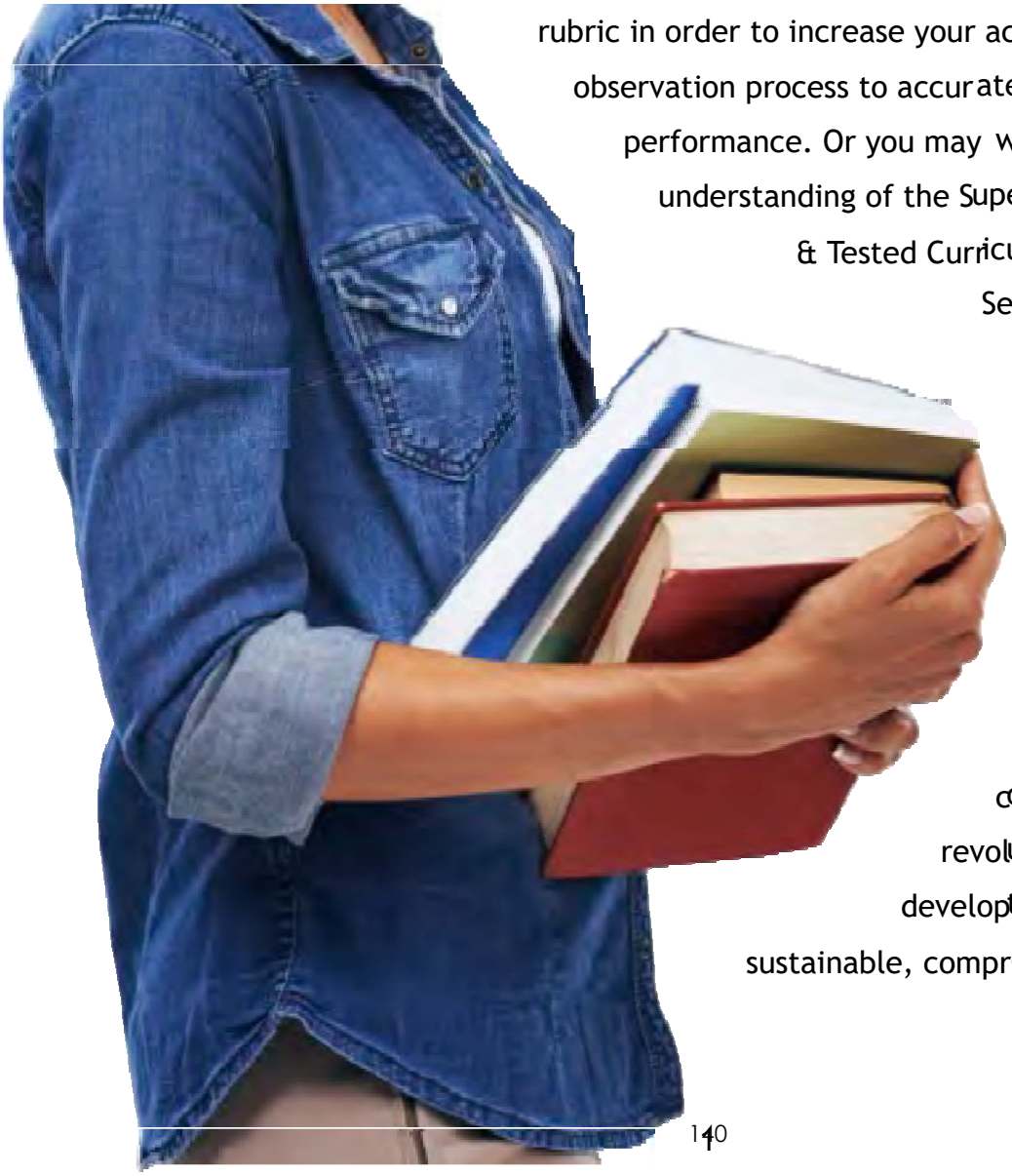
A Closer Look at Educator Goal Plans:
Information for Leaders

A description of Educator Goal Plans for REIL and REIL-TNG Alliance Partners

REIL is an initiative of

Educator Goal Plan Overview

It's all about you! This is your time to enhance your leadership practices in alignment with your evaluation results. As a participant in the Rewarding Excellence in Instruction and Leadership (REIL) program, you may have received your very first performance classification and are looking forward to moving across the REIL Score continuum in the years to come. As an individual professional, you have strengths and opportunities for growth that are different from those of your colleagues. For example, you may be looking forward to moving into the "4" range on the Observation & Evaluation of Instruction element of the Leading Instruction rubric in order to increase your accuracy and use of the observation process to accurately evaluate teacher performance. Or you may want to gain a better understanding of the Supervision of Written, Taught, & Tested Curriculum element of the Securing Accountability rubric so that you can better support curriculum alignment and understand implementation of vertical progressions. This is where the Educator Goal Plan (EGP) comes in. The EGP is a revolutionary tool designed to develop talent in leading through a sustainable, comprehensive program of



performance-based evaluation and support. Your evaluator will be talking to you soon about this exciting development and he/she will collaborate with you to create an individualized EGP just for you. Through the EGP, you will have the opportunity to focus on a specific goal and receive differentiated support aligned to the Leading Observation Instrument (LdOI) and an identified content area.

Other education professionals will also take part in the EGP process, including teachers, master educators/instructional coaches, and other building-level administrators. The collaborative goal-setting process and the aligned action plans in the areas of planning, implementation, and progress monitoring will ensure you and your colleagues focus on meaningful professional learning experiences that have the best chance for positively impacting teacher growth and student learning.

Imagine a future where you are able to identify an area of leadership practice to dig into, consistently apply your learning at your school site, receive feedback on your efforts – and then see the reward via increased student learning. That is the power of the EGP!

The Goal

Get ready to participate in one of the most impactful experiences you will have as a building-level administrator!

Goal-setting is a powerful means to focus on a leadership practice in order to facilitate increased teacher growth and development and student learning. Very rarely have leaders received focused professional development designed to increase their effectiveness as leaders. With an established educator goal, you will be able to take charge of your growth as a school leader in alignment with needs identified through the evaluation process (educator observations and student growth results).

The educator goal has two parts: (1) a student learning component in an identified content area that supports the school's continuous improvement plan, and (2) an identified element or elements from the Leading Observation Instrument that will provide a focus for meeting teacher and student learning outcomes.

Sample Goal

By October, 2014, Veronica Castillo will show increased proficiency in the ability to lead school improvement efforts in *Leading Instruction*: *Pre & Post Conference Data Gathering* as evidenced by improved element scores and improved student achievement in the content area of reading as evidenced by improved assessment scores on the following assessments: AIMS and REIL Score.

The Action Plan

Job-Embedded Professional Learning

You will be supported in achieving your educator goal through the personalized action plan component of the Educator Goal Plan. Each EGP includes an action plan in the areas that get at the heart and soul of leading - Planning, Implementation, and Progress Monitoring. Your action plans will contain specific objectives aligned to these three areas, and the steps you will take to help you successfully meet the objectives. For example, Veronica Castillo's goal speaks to the element Pre & Post Conference: Data Gathering from the Leading Instruction rubric. Miranda's action plan includes an objective to plan follow up questions in order to probe deeper during conferences. Her action steps include items such as: (1) Attend Instructional Conferencing II workshop, and (2) Collaborate with Support Team Member to write probing questions.

Support Team Member

You are not alone!

Action plans will also identify a support team member who will be charged with assisting you on your EGP journey. This could be a fellow building-level administrator, a member of your district team such as the C & I Director, or your superintendent. Your support team member will provide feedback on your progress and help you understand how to demonstrate that your objectives have been completed.

Remember, the action plan is designed to provide differentiated support and job-embedded professional development to all educators. Ensuring educators have the right amount of support is a critical component of that plan.

Frequently Asked Questions

1 Who writes the educator goal?

The educator goal is written by the designated evaluator in collaboration with the leader.

2 How does an element get selected for my educator goal?

Observation results, including element scores and reinforcements and refinements of teachers, will be analyzed to determine appropriate elements of focus for a specific leader. It may not be the lowest scored element from the observation process that is identified. Some elements are foundational to other elements, or work well to implement in various settings when paired with another element. The idea is to identify an area that is meaningful to you – and that will benefit your student achievement results in alignment with your school's continuous improvement process.

3 How is a content area selected for my goal?

Your evaluator will spend time studying district initiatives, your school goals, and your student achievement data. Together, you will craft your EGP based on this analysis.

4 Will my goal be the same as other leaders at my school?

Since goals are designed to align to district- and school-level continuous improvement plans, it is highly likely that your goal may be similar to another leader's goal. It is also possible for district evaluators to form cadres of administrators with similar goals to streamline professional development opportunities. Your evaluator will analyze common goal areas in order to inform the year-long professional development plan and to leverage existing resources for cohorts of leaders with similar goals.

5 **What happens if I meet my goal mid-year?**

Educator goals are meant to be year-long in order to provide meaningful focus and attention that leads to implementation and institutionalization of agreed-upon instructional practices at a site. Leaders will have many opportunities over the course of the school year to demonstrate progress during the observation and evaluation process. Demonstration of progress as well as consistent implementation of practice is important in gauging mastery of the goal. It is possible that the action plan portion of an EGP can be adjusted in order to account for additional needs relative to progress toward the goal.

6 **What happens if I don't meet my goal?**

Your evaluator/support team member will assist you in carrying out your action plan steps so that you can successfully reach your goal. Your action plan can be modified in order to provide greater support or better alignment of resources. If you are unable to meet your goal, you will work with your evaluator to determine if you should continue working on that goal the following school-year.

7 **Who has access to my Educator Goal Plan?**

Your evaluator and superintendent (if not your evaluator) will have access to your EGP in the Observation Data Capture Tool (ODCT) Component of the REILize Decision Support System (RDSS). There are some additional features that will be rolled out in the near future in ODCT that will allow you and your identified support team member to document progress toward goal mastery.

8 **Where can I get more information on Educator Goal Plans?**

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REIL

Professional Development Plan Version 1
Continuing TIF3/TIF4 Districts with Continuing Educators

Year 1			
Learning	Coaching	Leading	Evaluating
LOI Booster (3 hrs.) My Educator Goal Plan (3 hrs.) Critical Thinking Mindset (online module) Critical Thinking: Teaching the Growth Mindset (online module) Going Deeper with Student to Student Engagement (3 hrs.) The Work of Collaborative Teams (3 hrs.) Element Specific videos matched to observation data (RDSS) Element Specific Online Modules (RDSS) **Optional courses to repeat from prior years:** Foundations of Instruction: Objective Writing (ELA, Mathematics, and/or Science) (2 hrs.)	Coaching Observation Instrument Overview (3 hrs.) Setting a Foundation for Coaching: Building Coaching Relationships (5 hrs.) Setting a Foundation for Coaching: Coaching Skills (6 hrs.) Setting a Foundation for Coaching: The Principal-Coach Partnership (6 hrs.) LOI Overview (3 hrs.) Instructional Conferencing 1.0 (6 hrs.) Instructional Conferencing 2.0 (6 hrs.) Educator Goal Plans: What's my Role (3 hrs.)	LOI Booster (3 hrs.) COI Booster (3 hrs.) Learning Observation Instrument Certified Evaluator Training (15 hrs.) Coaching Observation Instrument Certified Evaluator Training (15 hrs.) Supervision of Written, Taught, and Tested Curriculum (3 hrs.) Educator Goal Plan Results (3 hrs.)	Leading Observation Instrument Overview (3 hrs.) Leading Observation Instrument Qualified Evaluator Training (30 hrs.) Leading Observation Certified Evaluator Training (30 hrs.)

Foundation of Instruction: Lesson Design (ELA, Mathematics, and/or Science) (2 hrs.) Supporting Teaching of the Standards Through Task Analysis (3 hrs.) Teacher Actions: Modeling (2 hrs.) Guided Practice and Check for Understanding (2 hrs.) Teacher Actions: Constructing Knowledge Part One (2 hrs.) Teacher Actions: Constructing Knowledge Part Two (2 hrs.)			

Year 2			
Learning	Coaching	Leading	Evaluating
Element Specific videos matched to observation data (RDSS) Element Specific Online Modules (RDSS) **Any needed courses from the menu below**	Goal Driven Collaboration: Designing Coaching Support (6hrs.) Goal Driven Collaboration: Coaching Cycles (6 hrs.)	Getting Ready: Framing Your Data (6 hrs.) Data Analysis (6 hrs.) Strengthening Your Vision Through Public Narrative (6 hrs.)	Leading Observation Certified Evaluator Field Training (15 hrs.) Educator Goal Plans (3 hrs.)

Professional Development Plan Version 1
Continuing TIF3/TIF4 Districts with Continuing Educators

Routines & Procedures (2 hrs.) Responsibility for Learning & Relationships (3 hrs.) Monitoring and Responding to Student Behavior (2 hrs.) Using Formative Assessment for Instructional Decision Making (2 hrs.) Supporting Teaching of the Standards Through the Learner Engagement (2 hrs.) Using Formative Assessment To Monitor and Adjust Instruction (2hrs.)	Supporting Teachers Along the Learning Observation Instrument Continuum (6hrs.)	Strategic Conversations (6 hrs.) High Functioning Teams (6 hrs.)	

Year 3			
Learning	Coaching	Leading	Evaluating
Element Specific videos matched to observation data (RDSS) Element Specific Online Modules (RDSS)	The Collaborative Team (6 hrs.) Instructional Delivery (6 hrs.)	Action Planning (6 hrs.) Distributive Leadership (6 hrs.) PLC's for Leaders (3 hrs.) Understanding Resistance (6 hrs.) Sustainability (6 hrs.)	Leading Observation Certified Evaluator Training (15 hrs. job embedded)

Professional Development Plan Version 2
New LEAs (using LOI, COI, LDOI)
Continuing LEAs with New Educators

Year 1			
Learning	Coaching	Leading	Evaluating
Learning Observation Instrument Overview (3 hrs.) Foundations of Instruction: Objective Writing (ELA, Mathematics, and/or Science) (2 hrs.) Foundation of Instruction: Lesson Design (ELA, Mathematics, and/or Science) (2 hrs.) Supporting Teaching of the Standards Through Task Analysis (3 hrs.) Teacher Actions: Modeling (2 hrs.) Guided Practice and Check for Understanding (2 hrs.) Teacher Actions: Constructing Knowledge Part One (2 hrs.) Teacher Actions: Constructing Knowledge Part Two (2 hrs.)	Coaching Observation Instrument Overview (3 hrs.) Setting a Foundation for Coaching: Building Coaching Relationships (5 hrs.) Setting a Foundation for Coaching: Coaching Skills (6 hrs.) Setting a Foundation for Coaching: The Principal-Coach Partnership (6 hrs.) Learning Observation Instrument Overview (3 hrs.) Instructional Conferencing 1.0 (6 hrs.)	Leading Observation Instrument Overview (3 hrs.) Learning Observation Instrument Qualified Evaluator Training (30 hrs.) Learning Observation Instrument Certified Evaluator Training (30 hrs.) Educator Goal Plan Results (3 hrs.)	Leading Observation Instrument Overview (3 hrs.) Leading Observation Instrument Qualified Evaluator Training (30 hrs.) Leading Observation Certified Evaluator Training (30 hrs.)

Professional Development Plan Version 2
New LEAs (using LOI, COI, LDOI)
Continuing LEAs with New Educators

Year 2			
Learning	Coaching	Leading	Evaluating
Routines & Procedures (2 hrs.) Responsibility for Learning & Relationships (3 hrs.) Monitoring and Responding to Student Behavior (2 hrs.) Using Formative Assessment for Instructional Decision Making (2 hrs.) Supporting Teaching of the Standards Through the Learner Engagement Rubric (2 hrs.) Using Formative Assessment To Monitor and Adjust Instruction (2hrs.)	Educator Goal Plans: What's my role? (3 hrs.) Goal Driven Collaboration: Designing Coaching Support (6hrs.) Goal Driven Collaboration: Coaching Cycles (6 hrs.) Supporting Teachers Along the Learning Observation Instrument Continuum (6hrs.)	Instructional Conferencing 2.0 (6 hrs.) Supervision of Written, Taught, and Tested Curriculum (3 hrs.) Getting Ready: Framing Your Data (6 hrs.) Data Analysis (6 hrs.) Strengthening Your Vision Through Public Narrative (6 hrs.) Learning Observation Instrument Certified Evaluator Training (15 hrs.) Coaching Observation Instrument Certified Evaluator Training (15 hrs.)	Leading Observation Certified Evaluator Field Training (15 hrs.) Educator Goal Plans (3 hrs.)

Professional Development Plan Version 2
New LEAs (using LOI, COI, LDOI)
Continuing LEAs with New Educators

Year 3			
Learning	Coaching	Leading	Evaluating
Critical Thinking Mindset (online module) Critical Thinking: Teaching the Growth Mindset (online module) Going Deeper with Student to Student Engagement The Work of Collaborative Teams My Educator Goal Plan	The Collaborative Team (6 hrs.) Instructional Delivery (6 hrs.)	Strategic Conversations (6 hrs.) High Functioning Teams (6 hrs.) Action Planning (6 hrs.) Distributive Leadership (6 hrs.) Understanding Resistance (6 hrs.) Sustainability (6 hrs.)	Leading Observation Certified Evaluator Training (15 hrs. job embedded)

Professional Development Plan Version 3
New LEAs (using their own observation instruments)

Year 1			
Learning	Coaching	Leading	Evaluating
Teaching Observation Instrument Overview (3 hrs.) Foundations of Instruction: Objective Writing (ELA, Mathematics, and/or Science) (2 hrs.) Foundation of Instruction: Lesson Design (ELA, Mathematics, and/or Science) (2 hrs.) Supporting Teaching of the Standards Through Task Analysis (3 hrs.) Using Formative Assessment for Instructional Decision Making (2 hrs.) Supporting Teaching of the Standards Through the Learner Engagement Rubric (2 hrs.)	District Specific Coaching Observation Instrument Overview (3 hrs.) Setting a Foundation for Coaching: Building Coaching Relationships (5 hrs.) Setting a Foundation for Coaching: Coaching Skills (6 hrs.) Setting a Foundation for Coaching: The Principal-Coach Partnership (6 hrs.) District Specific Teacher Observation Instrument Overview (3 hrs.) Instructional Conferencing 1.0 (6 hrs.) Instructional Conferencing 2.0 (6 hrs.) Educator Goal Plans: What's my role? (3 hrs.)	District Specific Leading Observation Instrument Overview (3 hrs.) District Specific Teaching Observation Instrument Qualified Evaluator Training (30 hrs.) District Specific Coaching Observation Instrument Qualified Evaluator Training (30 hrs.) District Specific Teaching Observation Instrument Certified Evaluator Training (30 hrs.) Educator Goal Plan (3 hrs.)	District Specific Leading Observation Instrument Overview (3 hrs.) District Specific Leading Observation Instrument Qualified Evaluator Training (30 hrs.) District Specific Leading Observation Certified Evaluator Training (30 hrs.)

Professional Development Plan Version 3
New LEAs (using their own observation instruments)

Year 2			
My Educator Goal Plan (3 hrs.) **Choice menu to fit your instructional needs**	Goal Driven Collaboration: Designing Coaching Support (6hrs.)	Instructional Conferencing 2.0 (6 hrs.) Supervision of Written, Taught, and Tested Curriculum (3 hrs.)	Leading Observation Certified Evaluator Field Training (15 hrs.) Educator Goal Plans (3 hrs.)
Teacher Actions: Modeling (2 hrs.) Guided Practice and Check for Understanding (2 hrs.) Teacher Actions: Constructing Knowledge Part One (2 hrs.) Teacher Actions: Constructing Knowledge Part Two (2 hrs.) Routines & Procedures (2 hrs.) Responsibility for Learning & Relationships (3 hrs.) Monitoring and Responding to Student Behavior (2 hrs.)	Goal Driven Collaboration: Coaching Cycles (6 hrs.) Supporting Teachers Along the Learning Observation Instrument Continuum (6hrs.)	Getting Ready: Framing Your Data (6 hrs.) Data Analysis (6 hrs.) Strengthening Your Vision Through Public Narrative (6 hrs.) Strategic Conversations (6 hrs.) High Functioning Teams (6 hrs.)	

Professional Development Plan Version 3
New LEAs (using their own observation instruments)

Year 3			
Learning	Coaching	Leading	Evaluating
Using Formative Assessment To Monitor and Adjust Instruction (2 hrs.) Critical Thinking Mindset (online module) Critical Thinking: Teaching the Growth Mindset (online module) Going Deeper with Student to Student Engagement (3 hrs.) The Work of Collaborative Teams (3 hrs.)	The Collaborative Team (6 hrs.) Instructional Delivery (6 hrs.)	Action Planning (6 hrs.) Distributive Leadership (6 hrs.) Understanding Resistance (6 hrs.) Sustainability (6 hrs.)	Leading Observation Certified Evaluator Training (15 hrs. job embedded)

How to Become A Data Driven School

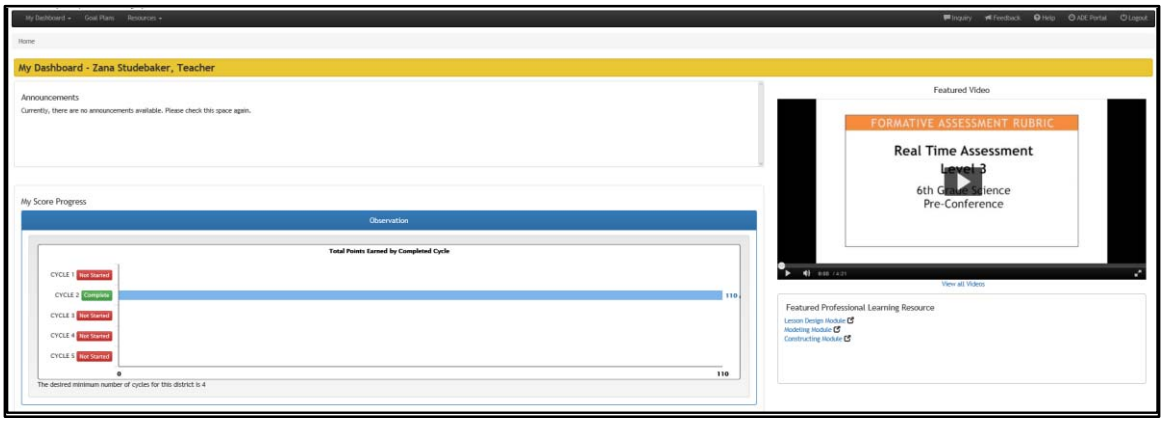
What	Who	When	Kinds of Data
Framing Data and Data for Leaders - includes balanced assessment model	Leaders	2 days	achievement tests, observation data, other data sources
Design a Data Day - TOT	Leaders and Leadership team	half day	state and benchmark tests
Supporting PLCs - high functioning teams, protocols,	Leaders and Leadership team	half day	state and benchmark tests
Using Our School Data -	On-site coaching at school Data Day	half day	state and benchmark tests
Data analysis skills and balanced assessment plans for teachers	Leaders facilitate, On-site coaching at school Data Day	half day	achievement tests, observation data, other data sources
DOK 3 and Assessment - Connecting formative and summative via content and rigor	Teachers, Coaches, Leaders	1 day	full range of achievement measures
Data Analysis in Collaborative Teams (PLC) - How to move through a process, student problem of learning may require standard deconstruction, including instruction strategy options to support the teacher problem of practice	Teachers, Coaches, Leaders	1-3 days	benchmarks, common formative assessments
Benchmark Data Day	Coaches or teacher leaders facilitate - on site coaching	half day	benchmarks, common formative assessments
Writing Common Formative Assessments	Teachers, Coaches, Leaders	1 day	common formative assessments
Analyzing our CFA's	Coaches or teacher leaders facilitate - on site coaching	PLC times	common formative assessments

Monitoring the teaching and learning cycle - are teachers actually changing instruction based on the CFA's? Consider using the Supervising Written, Taught and Tested workshop here.	Leaders	half day	full range of achievement measures, other data sources
Planning Real-time Assessment	Teachers, Coaches, Leaders	half or whole day	daily and minute by minute sources of "data"
Walk-throughs for real time assessment	Leaders		daily and minute by minute sources of "data"

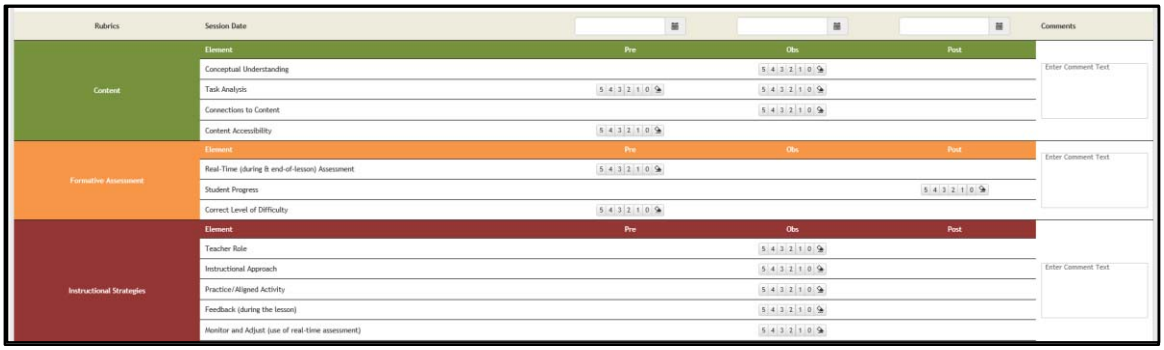
REILize Decision Support System

EDUCATOR PROFILE DASHBOARDS AND REPORTS

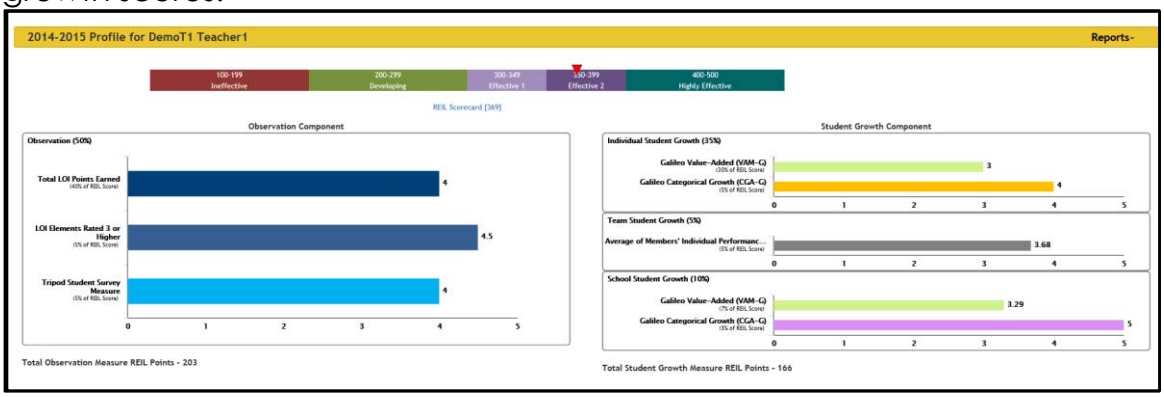
RDSS.1 Educator Dashboard — Current messages, featured videos, featured professional development resources, and REIL Score progress meter.



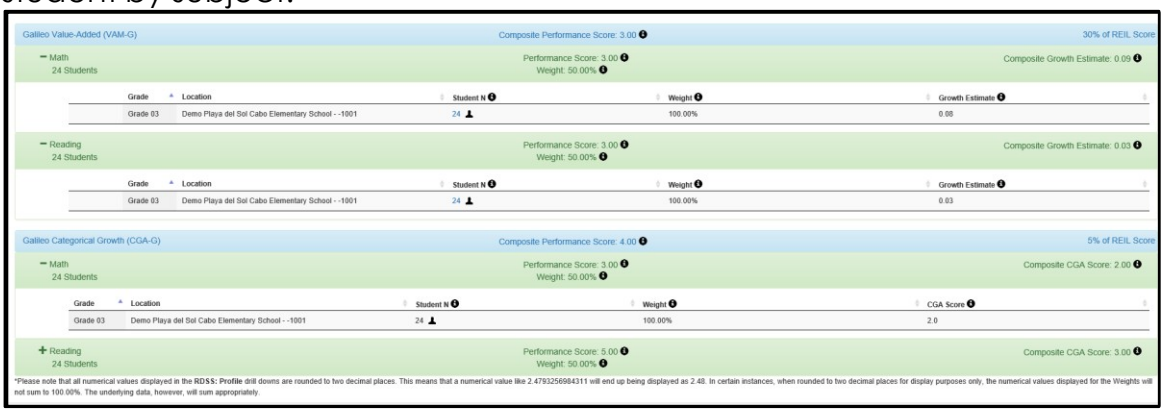
RDSS.2 Observation Capture Tool - Displays all educator observation scores.



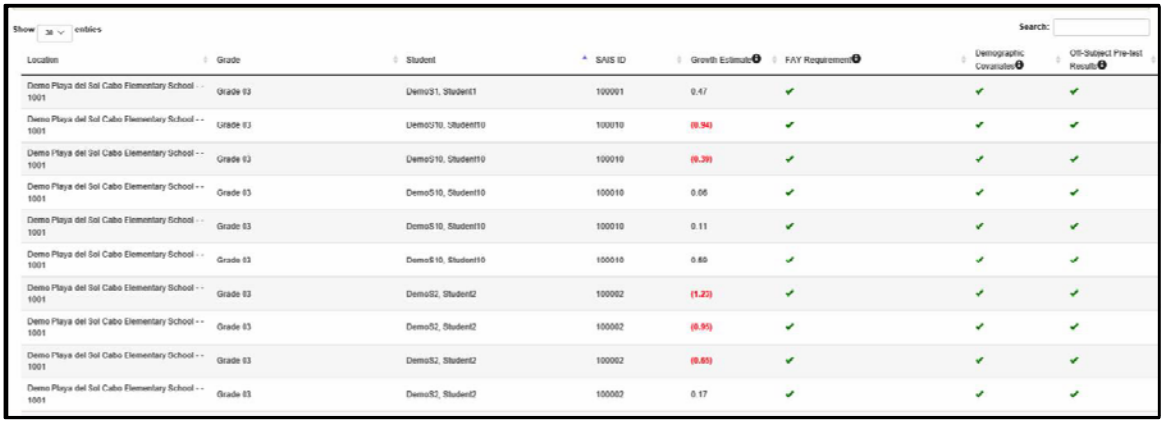
RDSS.3 Educator Profile - REIL Score, educator observation scores, student growth scores.



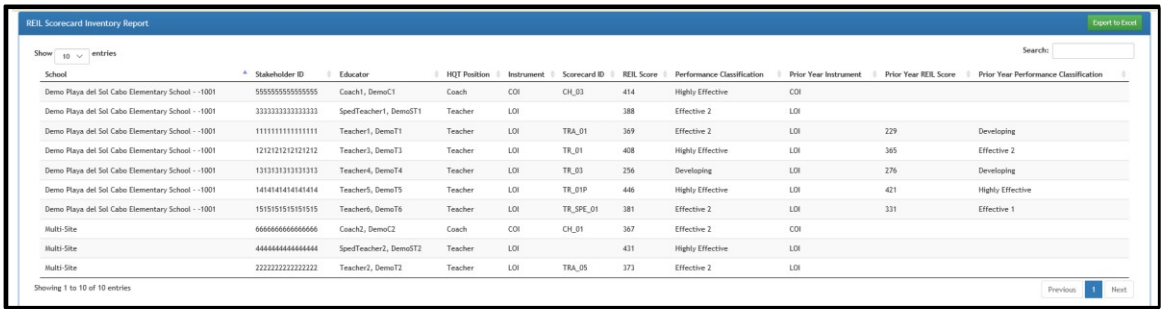
RDSS.4 Teacher Level Drill Downs - Displays student growth scores for every student by subject.



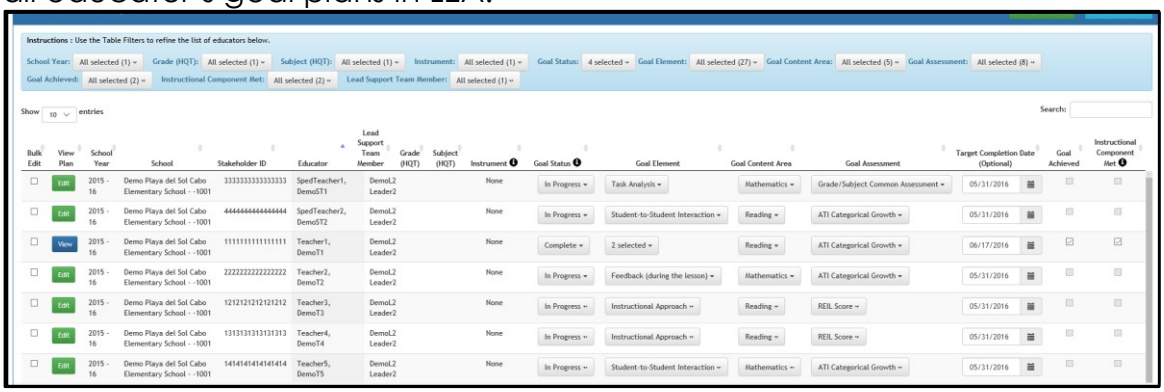
RDSS.5 Student Level Drill Downs - Displays student growth scores for every student in LEA.



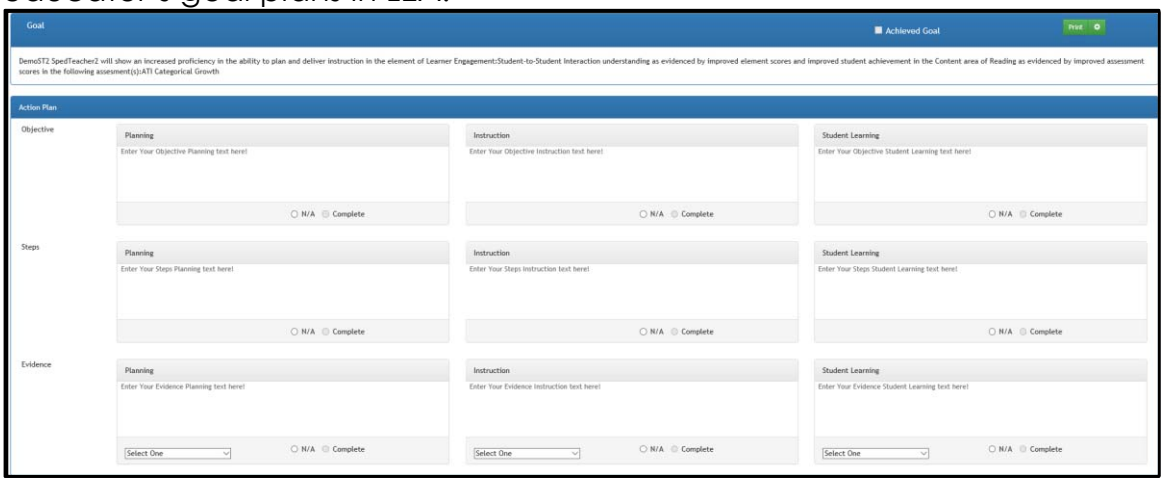
RDSS.6 REIL Scorecard Inventory Report - Displays all REIL scores for every educator in LEA.



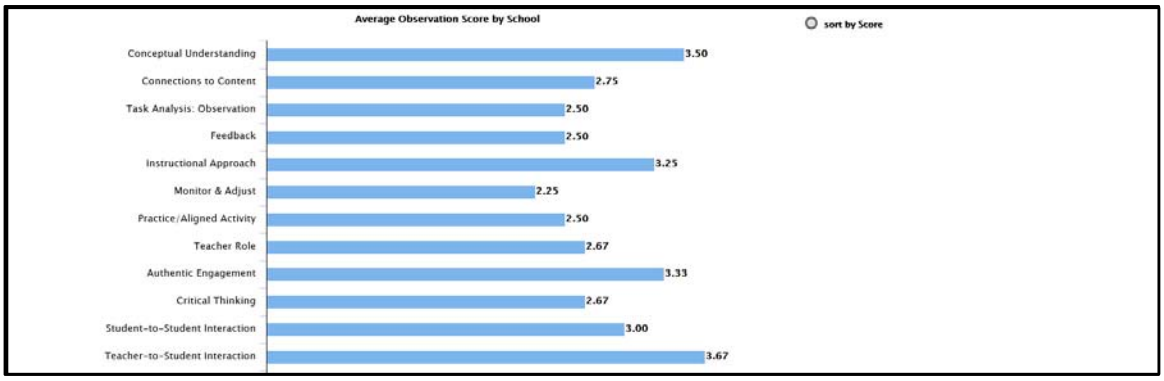
RDSS.7 Educator Goal Plan Management Page - Displays the progress of all educator's goal plans in LEA.



RDSS.8 Educator Goal Action Plans - Displays the action plans for all educator's goal plans in LEA.



RDSS.9 Average Observation Scores - Displays the average educator observation scores, by observation element, at the district and school level.

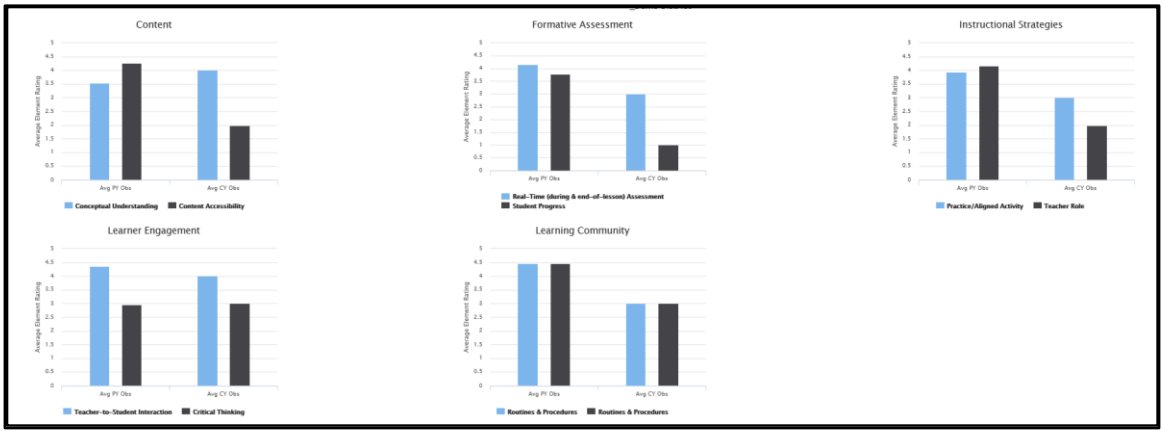


RDSS.10 Observation Scores Heat Map - Visually displays the average educator observation scores, by observation element, at the district and school level.

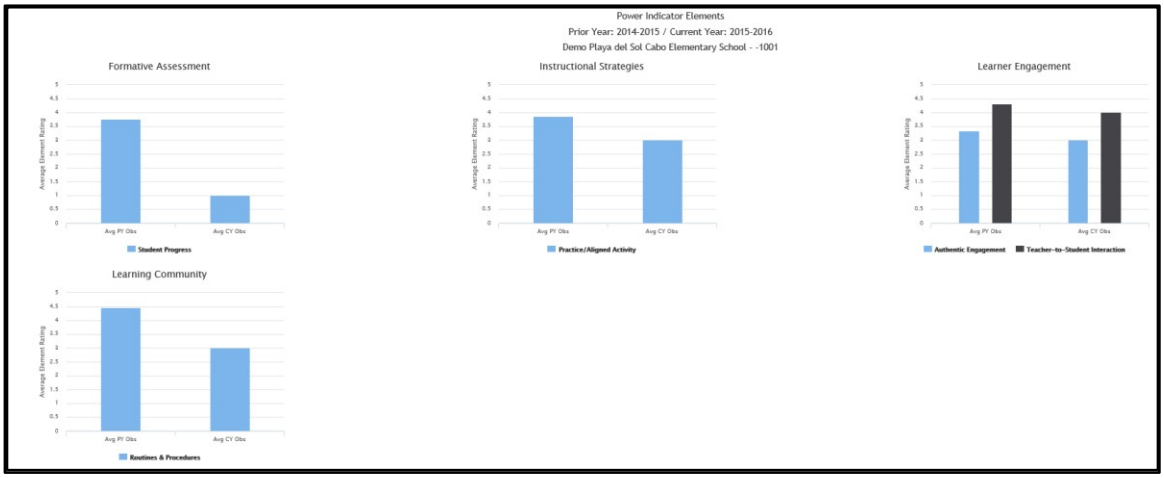
District Average Observation Scores

Conceptual Understanding	3.12	3.47
Connections to Content	3.28	3.45
Task Analysis: Observation	3.48	3.91
Feedback	3.72	3.79
Instructional Approach	3.24	3.43
Monitor & Adjust	3.12	3.51
Practice/Aligned Activity	3.52	3.70
Teacher Role	3.80	4.19
Authentic Engagement	3.08	3.28
Critical Thinking	2.96	2.91
Student-to-Student Interaction	2.40	2.66
Teacher-to-Student Interaction	3.72	3.83
Montoring & Responding to Student Behavior	3.40	3.66
Relationships	4.04	4.09

RDSS.11 Professional Development Planning Report - Displays the highest and lowest average educator observation scores, by observation rubric, at the district level.



RDSS.12 Professional Development Planning Report - Displays the highest and lowest average educator observation scores, by element, at the school level.



RDSS.13 Professional Development Planning Report - Displays the highest and lowest average educator observation scores, by element, at the educator level.

Professional Development Planning Report

Reset Table Filters

School: All selected (2) Grade: All selected (1) Subject: All selected (1) # of Completed Current Year Observation Cycles: All selected (3)

Show 10 entries

Search:

School Year	School Name	StakeHolder ID	Name	Conceptual Understanding	Conceptual Understanding	Connections to Content	Connections to Content	Authentic Engagement	Authentic Engagement	Critical Thinking	Critical Thinking	Student-to-Student Interaction	Student-to-Student Interaction	Responsibility for Learning	Respo Learni
2014-2015	Demo Playa del Sol Cabo Elementary School - -1001	1313131313131313	DemoT4 Teacher4	3.00	↓ 2.00	3.00	■ 3.00	2.00	■ 2.00	2.50	↓ 1.00	2.50	↓ 2.00	2.50	
2014-2015	Demo Playa del Sol Cabo Elementary School - -1001	1111111111111111	DemoT1 Teacher1	4.00	↓ 3.00	4.00	↓ 3.00	4.00	↓ 3.33	3.67	↓ 3.00	4.33	↓ 3.00	4.00	
2014-2015	Multi-Site	2222222222222222	DemoT2 Teacher2	3.50	↓ 3.00	3.50	↓ 2.33	3.25	↓ 3.00	2.75	↓ 2.33	3.00	↓ 2.67	3.00	
2014-2015	Demo Playa del Sol Cabo Elementary School - -1001	1212121212121212	DemoT3 Teacher3	3.50	↑ 3.75	4.00	■ 4.00	4.00	■ 4.00	3.00	↑ 3.25	3.00	↑ 3.25	3.25	

Showing 1 to 6 of 6 entries

Previous 1 Next

RDSS.14 Comprehensive Personnel Report - The complete data report of every educator in LEA.

Comprehensive Personnel Report
SY2014-15
SpedTeacher1 ,DemoST1
Printed on June 30, 2016 at 07:48 AM

Page 1 of 3

Performance Classification Data

School Year	REIL Score*	Performance Classification	Role	No Of Observation Cycles	Last Updated Date & Time
SY2014-15	388	Effective 2	Teacher	3	4/7/2015 6:29:36 PM

*The REIL Score is a value between 100 and 500, consisting partially of observation data and partially of student growth data.

Demographic Data

School Association(s) : Demo Playa del Sol Cabo Elementary School - -1001	**EPP Participation Status** : Participating
HQT Position : Teacher	**Grade(s) Taught** : No data available
Observation Instrument : LOI	**Subject(s) Taught** : No data available

Observation Cycle Dates

Cycle	Pre-Conference	Observation	Post-Conference
1	09/18/2014	09/27/2014	10/03/2014
2	11/21/2014	11/22/2014	11/26/2014
3	04/23/2015	04/25/2015	05/01/2015

Summative Observation Data

OBSERVATIONS		Content	Formative Assessment	Instructional Strategies	Learner Engagement	Learning Community	CYCLE TOTAL	REINFORCEMENT	REFINEMENT
Cycle Submitted Date Grade Subject Evaluator	1 5/21/2015 Second grade Special Education DemoA Admin	15/15	15/15	27/30	9/10	14/15	80/85	Learning Community Relationships	Instructional Strategies Teacher Role
Cycle Submitted Date Grade Subject Evaluator	2 9/26/2015 Ungraded Special Education DemoA Admin	11/15	13/15	23/30	7/10	10/15	64/85	Instructional Strategies Teacher Role	Learner Engagement Authentic Engagement
Cycle Submitted Date Grade Subject Evaluator	3 9/26/2015 Second grade Special Education DemoA Admin	10/15	14/15	25/30	7/10	12/15	68/85	Instructional Strategies Teacher Role	Learner Engagement Authentic Engagement
RUBRIC TOTAL		36/45	42/45	75/90	23/30	36/45	212/255		

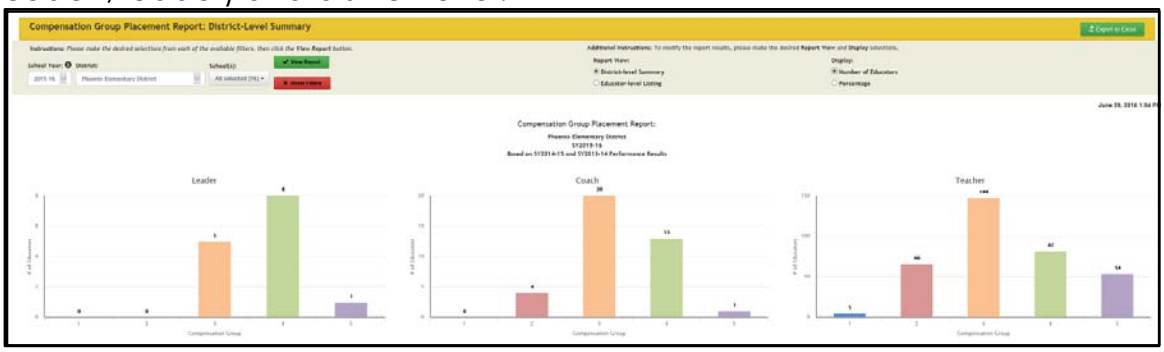
Cumulative Summary	Results after 3 cycle(s)	Performance score after 3 cycle(s)
Total REIL LOI Points Earned	195	4.00
LOI Elements Rated 3 or Higher	48	4.00

Signature

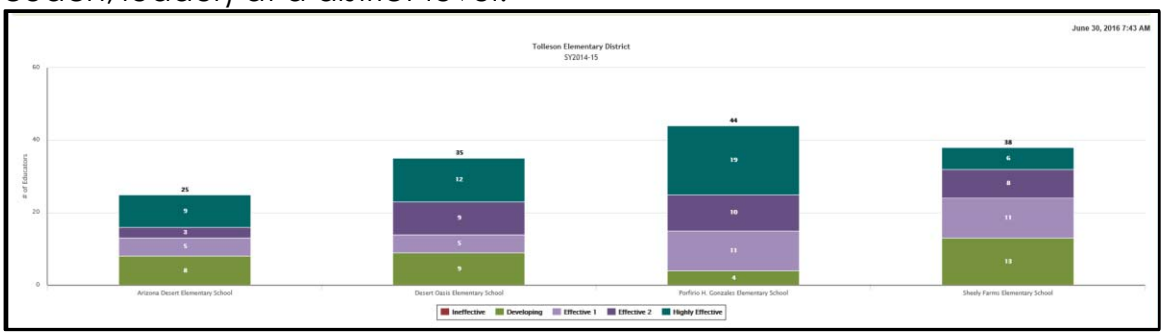
Signature by the educator indicates acknowledgment of receipt of this report; it does not necessarily denote agreement with the contents of the report. Educators have the opportunity to respond to the evaluation on which this report, in part, is based in writing and/or appeal as permitted by District policy and A.R.S. § 15-537.

Signature _____ Printed Name _____ Date _____

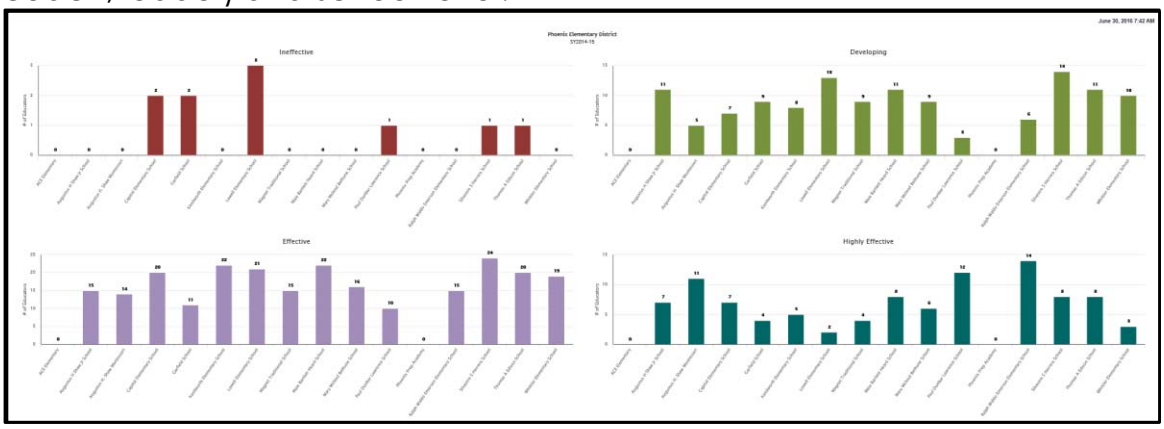
RDSS.15 Compensation Group Report - Displays the performance-based compensation breakdown of compensation group by role (teacher, coach, leader) at a district-level.



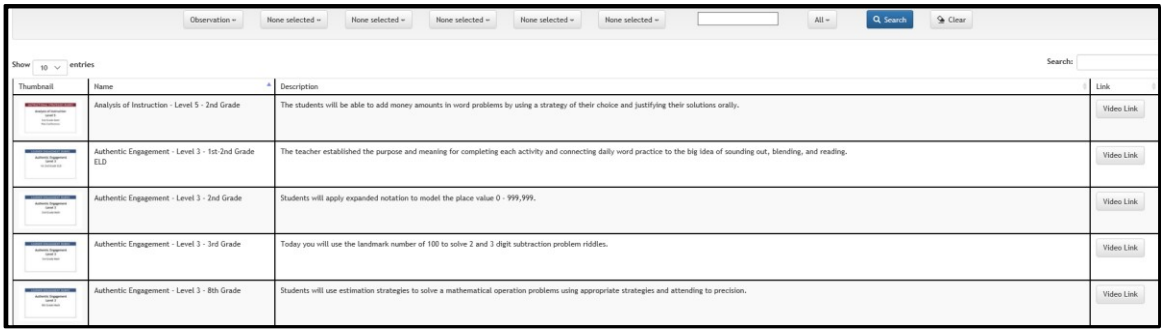
RDSS.16 Human Capital Management System Report - Displays the performance breakdown of each performance level by role (teacher, coach, leader) at a district-level.



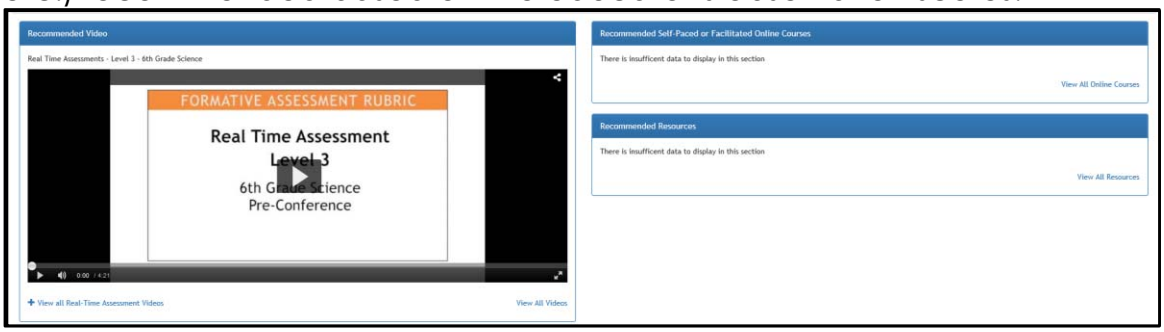
RDSS.17 Human Capital Management System Report - Displays the performance breakdown of each performance level by role (teacher, coach, leader) at a school-level.



RDSS.18 Professional Development Search - Displays all of the professional development resources (videos, courses, articles, guides, etc.) aligned to educator observation elements and levels.

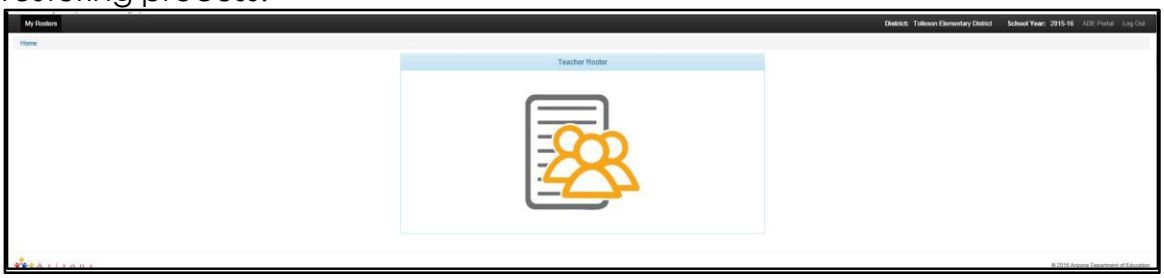


RDSS.19 Professional Learning Resource Directory - Displays specific professional development resources (videos, courses, articles, guides, etc.) recommended based on the educator's observation scores.

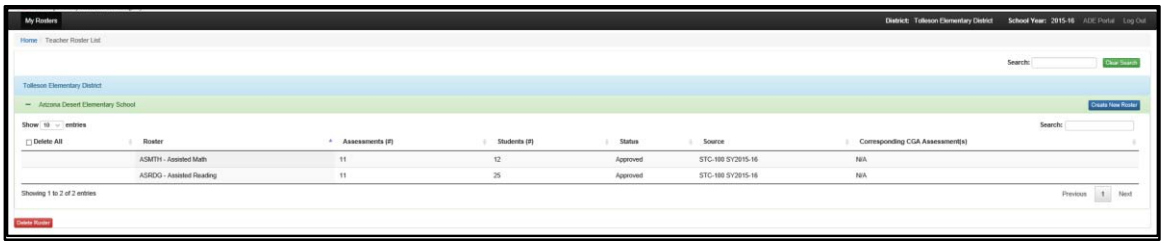


ROSTERING FEATURES

RDSS.20 Teacher Landing Page - The start page for teachers to begin the rostering process.



RDSS.21 Teacher Roster List Page - Displays all of the available rosters a teacher has and the status of each.



RDSS.22 Teacher Roster Details Page - The "control page" where the teacher claims each student and assessment that should be included on her/his roster.

Example Reports in REILize Decision Support System

Report Name	Report Description
Average Observation Score by School	This school-level report allows users to view aggregated observation data for all observed educators groups. Users can filter to a specific observation cycle or set of observation cycles (for LOI and LOI-SpEd), if desired. The report also allows users to filter to a specific rubric or set of rubrics, if desired. See Screenshot in Appendix F: REILize Decision Support System (RDSS.8 Average Observation Scores)
Observation Scores Heat Map	This report provides a heat map for district-wide observation data, disaggregated by school. This allows a user to quickly determine if there are trends within certain observation rubrics or elements across the district. Users can filter to a specific observation cycle or set of observation cycles (for LOI and LOI-SpEd), if desired. The report also allows users to filter to a specific rubric or set of rubrics, if desired. See Screenshot in Appendix F: REILize Decision Support System (RDSS.10 Observation Scores Heat Map)
REIL Score Components Inventory Report	This educator-level report includes each educator's REIL Score, performance classification, and a summary of assessment data used to calculate the REIL Score. Abundant filtering allows users to quickly group educators based on the type(s) of assessment and subject area(s) to which they are attached for student growth calculations thereby enabling the planning of appropriate differentiated professional development groupings.
Performance Classification Report	This HCMS report quickly provides a district-wide snapshot of how many teachers fall into each of the four (for REIL-TNG) or five (for REIL) performance classification categories. There are four "Report Views" available within this single report, as follows: *District-level Summary*: The number and percentage of all educators, across the district, in each performance classification, differentiated by role. *District/School Comparison*: The number and percentage of all educators at a particular school in each performance classification compared to the district average, differentiated by role. *Schools Comparison*: The district-wide, school-to-school comparison of each individual performance classification differentiated by role. *Performance Classification Comparison*: The single-view (stacked) district-wide, school-to-school comparison of each performance classification differentiated by role. See Screenshot in Appendix F: REILize Decision Support System (RDSS.16 & RDSS.17 Human Capital Management Systems Report)
Professional Development	An administrator is able to run a multi-view report at the district-, school-, and/or educator-level. The observation summary statistics

Planning Report	are broken up into four categories: *Highest & Lowest*, *Power Indicators*, *Early Warning Sign*, and *High-Leverage* elements. The element categories show the prior and current year average scores for various elements. The educator-level data displays the growth on specific elements for every teacher observed on the LOI. The district- and school-level views aim at supporting instructional leaders (e.g., Building-level Administrators) who will manage support/professional development caseloads based on school-level score results. See Screenshot in Appendix F: REILize Decision Support System (RDSS.11, RDSS.12 & RDSS.13 Professional Development Planning Report)
Student Growth Drill Downs	Instructional leaders are able to access up to four levels of drills downs associated with the individual-level components of a Teacher's REIL Score (e.g., value-added results calculated using ATI-Galileo assessments or VAM-G). The four levels are: • Level 1 - Composite Performance Score by Measure • Level 2 - Performance Score and Composite Growth Estimate by Subject • Level 3 - Growth Estimate by Grade Level • Level 4 - Growth Estimate by Location within a Grade Level (for multi-site teachers) Instructional leaders also have the ability to see what students were included in a Teacher's Individual Student Growth Drill Down results (i.e., Growth Estimates). This information can be used to determine each teacher's strengths and weaknesses by assessment and subject to enable the planning of differentiated professional development. See Screenshot in Appendix F: REILize Decision Support System (RDSS.4 Teacher Level Drill Downs & RDSS.5 Student Level Drill Downs)
Raw Data Export – Performance Data	This export allows administrators to download an Excel spreadsheet with observation performance scores, scorecard performance measures, and all demographic data associated with all educators in their organization. Administrators are able to organize and sort data to fit their planning needs.
Observation Cycle Report	This report shows a Teacher's individual observation scores by cycle. The page allows a teacher to click on each score and then be automatically directed to the educator's Professional Development dashboard, which will provide resources catering to that specific element at a level appropriate for that educator based on his/her score for that element. This means that the professional development needs for each educator are automatically identified by RDSS based on his/her observation scores.
Summative Cycle Report	This report shows a Teacher's individual observation scores across all of his/her completed observation cycles. An instructional leader can use this summative view of an educator's performance on

	observations to identify trends and those rubrics/elements where professional development might be required.
Educator Goal Plan Management Page	This Educator Goal Plan Management page will enable instructional leaders to create and manage goals for all educators. The page allows users to filter by goal elements, content areas, and assessments, which enables the grouping of similarly situated educators for the purposes of professional development planning. See Screenshot in Appendix F: REILize Decision Support System (RDSS.7 Educator Goal Plan Management Page)

REIL Score Guidebooks

Rewarding Excellence in Instruction and Leadership

Conceptual Guidebook: Components of the REIL Score

A practitioner's guide to understanding the REIL performance measures.

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Frequently Asked Questions about the Learning Observation Instrument 8

How is Student Growth Used to Measure My Performance? 10

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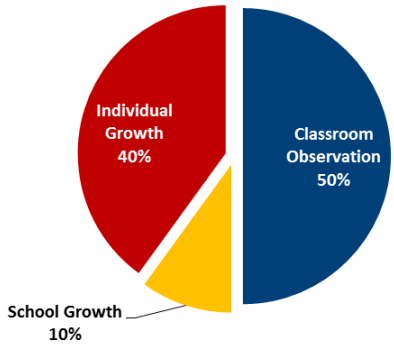
Components of the REIL Score

Components of the REIL Performance Evaluation System

As shown in Figure 1, the REIL performance evaluation system conceptually has three major components: Classroom Observation (50 percent), Individual Growth (40 percent), and School Growth (10 percent).

Figure 1. Components of the REIL Performance Evaluation System



In general, a teacher's evaluation results within each component are converted to performance scores on a **Common 1 to 5 Scale**. Each component's performance scores are then combined to calculate a final REIL Score and an aligned performance classification.

Classroom Observation

The Learning Observation Instrument (LOI) supports ongoing feedback to teachers on their instructional practice over the course of a school year. Teachers undergo multiple observation cycles during the year, each consisting of a pre-conference, classroom observation, and post-conference. For each cycle, teachers are rated on 22 elements of teaching based on a 0-5 scale. Cycle scores are aggregated into a final observation score that is converted to the Common 1 to 5 Scale.

In addition to calculating the total LOI points across all cycles, observation scores are also used to create a measure based on consistency of proficient scores called the LOI 3+ Rate. For instance, a teacher who receives ratings of 3s on all elements will have a higher LOI 3+ Rate than one who receives 1s on some elements and 5s on others, even though the two teachers may earn the same total number of LOI points. The LOI 3+ rate is designed to reward teachers who consistently demonstrate proficiency across the LOI elements.

Measures of Student Growth

There are two general approaches to measuring student growth. They are: **Value-Added Modelling (VAM)** and **Categorical Growth Analysis (CGA).** Both approaches are based on comparing students' actual academic growth to their expected academic growth.

Student Growth: Value Added Modeling

Value-added modeling (VAM) is used to estimate the contribution of an individual teacher or school to student learning over the course of the school year. These contributions are measured using students' test scores on the AzMERIT, Galileo, Custom, and GOLD Assessments.

Value-added modeling uses statistical techniques to compare students' actual test scores to their predicted test scores. For each subject area, predictions are made about what a student is expected to achieve on a particular assessment based on what is typical for students who are in the same grade, have similar prior test scores and demographic characteristics, and are enrolled in a school with similar demographic characteristics. Students' actual test scores are then compared to their predicted test scores in order to determine their value-added achievement gain in the subject area. If students exceed expectations, the gain is positive. If they fall short of expectations, the gain is negative.

Student Growth: Categorical Growth Analysis

In addition to value-added analysis, categorical growth analysis (CGA) is used to evaluate student growth. The CGA model used in the REIL Score is calculated by Assessment Technology Incorporated (ATI). CGA compares observed growth to expected growth for students over a defined period of time. A statistical method called the *repeated measures t-test* is used to determine whether observed growth is significantly different from expected growth. Based on the results of this test, any given group of students is then categorized by the extent to which those students, on average, outperformed, met, or underperformed their growth expectations.

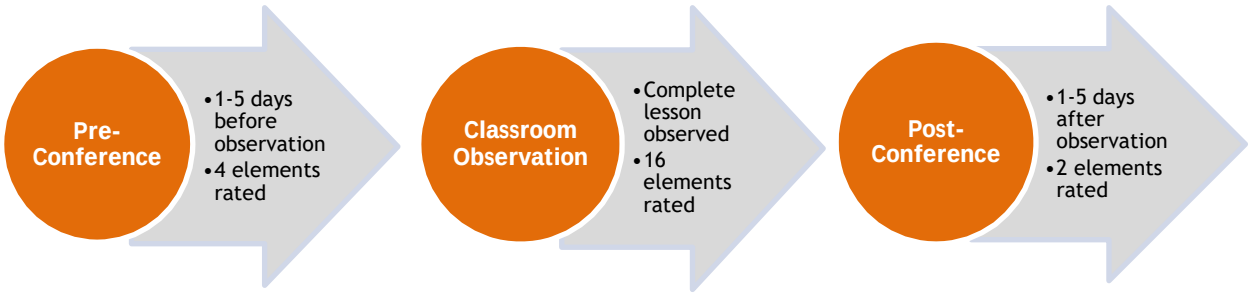
How is Observation Used to Measure My Performance?

Classroom observation results account for 50 percent of the REIL Score. This section provides an overview of the observation tool and process used by REIL Alliance districts to measure the quality of teachers' instructional practice. It also describes how the results of observations will be used to inform a teacher's REIL Score. More detailed information on the REIL observation tools and processes for all educators is available on the REIL Website.

The Learning Observation Instrument (LOI) and Observation Cycle

Teachers in REIL Alliance districts participate in multiple **LOI Observation Cycles** during a school year, enabling ongoing conversation about instruction among teachers, administrators, instructional coaches, and REIL Peer Evaluators. As seen in Figure 2, each LOI observation cycle consists of a pre-conference, classroom observation, and post-conference.

Figure 2. The LOI Observation Cycle



Instructional practices are assessed during this observation process using the **Learning Observation Instrument (LOI).** The LOI is the result of a collaborative effort to create a cross-district observational tool to be used as part of a performance-based evaluation system. It is designed to define effective teaching practices, encourage dialogue about instruction, and support differentiated professional growth. The LOI is comprised of six rubrics: **Content**, **Formative Assessment**, **Instructional Strategies**, **Learner Engagement**, **Learning Community**, and **Professional Responsibilities**. The LOI is aligned to the Model core teaching standards.

All rubrics, except **Professional Responsibilities**, are implemented uniformly across REIL Alliance districts. **Professional Responsibilities** is scored at the discretion of each district and not used in the REIL Score.

Each LOI rubric contains multiple elements resulting in a total of 22 unique elements, as shown in Table 1. Each element is rated either during the pre-conference, classroom observation, or post-conference phase of each observation cycle, with one exception. *Task Analysis*, in the **Content** rubric, is rated during both the pre-conference and classroom observation. Thus, during each observation cycle, a total of 22 elements are rated, the majority of which are assessed during the classroom observation. Evaluators rate each element on a scale from 0 to 5 according to the criteria provided in the rubrics.

Table 1. LOI Rubrics and Elements

Rubric	Element	Setting		
		Pre-Conference	Classroom Observation	Post-Conference
Content	Conceptual Understanding		1	
	Task Analysis	1	1	
	Connections to Content		1	
	Content Accessibility	1		
Formative Assessment	Real-Time Assessment	1		
	Student Progress			1
	Correct level of Difficulty	1		
Instructional Strategies	Teacher Role		1	
	Instructional Approach		1	
	Practice/Aligned Activity		1	
	Feedback		1	
	Monitor and Adjust		1	
	Analysis of Instruction			1
Learner Engagement	Student-to-Student Interaction		1	
	Teacher-to-Student Interaction		1	
	Authentic Engagement		1	
	Critical Thinking		1	
Learning Community	Routines and Procedures		1	
	Responsibility for Learning		1	
	Monitoring Student Behavior		1	
	Relationships		1	
	Total Element Ratings per Cycle:	4	16	2

Focus of the Pre-Conference

The pre-conference is an opportunity to discuss the lesson that will be observed as well as the lesson-planning process. The evaluator may ask questions for clarification, review any data and artifacts presented by the teacher, and document the discussion. During this time, a teacher will be scored on the four pre-conference elements of *Task Analysis*, *Content Accessibility*, *Real-Time Assessment*, and *Correct Level of Difficulty*.

Focus of the Classroom Observation

The observation is an opportunity for a teacher to present the complete lesson discussed in the pre-conference. The evaluator will observe the lesson within five school days of the pre-conference. During the classroom observation, the evaluator will script the lesson as well as students' responses and actions. Each lesson will be scored on 16 observation elements of the LOI.

Focus of the Post-Conference

The post-conference gives a teacher an opportunity to analyze and reflect on his/her lesson as well as discuss students' assessment results. The evaluator may ask questions for clarification, review any data and artifacts presented by the teacher, and document the discussion. The evaluator will score a teacher on the two post-conference elements of *Student Progress* and *Analysis of Instruction*.

What steps are taken to ensure that all evaluators rate the LOI rubric criteria with the same levels of rigor and objectivity?

It is essential for all evaluators to use the same standards when rating the LOI criteria. To ensure this is the case, all evaluators receive qualified and certified evaluator training. In order to establish and maintain inter-rater agreement, evaluators participate in co-observations, and an annual certified evaluator assessment.

Why doesn't the professional responsibilities rubric count toward my REIL Score?

The REIL Score is currently informed by elements that can be observed through classroom observation. The professional responsibilities rubric cannot be scored during a classroom lesson. In addition, each district handles professional responsibilities outside of the formal evaluation process according to its established policies and procedures.

Where can I learn more about the Learning Observation Instrument?

An informational webcast on the LOI is hosted at: **REIL Learning Observation Instrument Webcast**. Detailed information on the LOI is available in the Learning Observation Handbook as well as this Guidebook. Your district's REIL Field Specialist is also available to answer questions on the LOI or other components of the REIL program.

How is Student Growth Used to Measure My Performance?

This section provides a conceptual explanation of the measures used to assess teachers' impact on student growth.

What does it mean to measure student growth?

Whether student growth is estimated using Value-Added Modeling (VAM) or Categorical Growth Analysis (CGA), student growth refers to the difference between a given student's actual test score and an expected test score based on what is typical for students with similar pre-test scores.

Student growth differs from student achievement. Student achievement provides information, at one point in time, about whether a student has mastered academic content. In contrast, student growth looks at how student performance changes from one point in time to another.

Teachers are evaluated on both their individual students' growth as well as the growth of all students in the school in which they teach. The individual growth provides a measure of how a teacher is performing with his/her individual students. Teachers are also measured at the school level, because teachers are part of a school-level team with the shared goal to improve the performance of all students from one year to the next.

Measures of Student Growth

For REIL Scores, there are two general approaches to measuring student growth. They are: **Value-Added Modelling (VAM)** and **Categorical Growth Analysis (CGA)**. Both approaches are based on comparing students' actual academic growth to their expected academic growth. There are important distinctions between the two approaches and how each contributes to a teacher's REIL Score.

In general, the use of VAM and/or CGA depends on the following factors:

- The types of assessments administered by the school at which the teacher serves (e.g., AzMERIT, Galileo, Custom, and/or GOLD Assessments).
- The types of assessments administered to the students for whom the teacher is responsible (e.g., AzMERIT, Galileo, Custom, and/or GOLD Assessments).
- The student growth component being measured (i.e., individual or school).

What Is Value-Added Analysis?

A variety of sophisticated statistical techniques that use one or more years of prior student test scores, as well as other data, to adjust for preexisting differences among students when calculating contributions to student test performance.

-Braun, Chudowsky, & Koenig (2010). Getting Value out of Value- Added. National Academies Press.

Benefits of Using Value-Added Student Growth Measures

With regards to its use in instructional and educator evaluation systems, the practical benefits of VAM include the following:

- VAM is the only student growth model that levels the playing field by controlling for factors outside of the educator's control, such as student background and classroom and school characteristics. By controlling for other factors that also impact student achievement but are beyond the control of the teacher or school, VAM estimates the unique contributions of a particular teacher or school to student learning over time.
- Compared to other test-based evaluation models, VAM facilitates apples-to-apples comparisons across teachers or schools by adjusting for pre-existing differences in students' individual learning abilities and family backgrounds.[2]
- VAM captures student growth across the achievement distribution, including the growth of students who perform below state proficiency standards. Regardless of where students begin the school year academically, educators are evaluated based on their students' improvement over the course of the year.

[2] Meyer, R.H., & Dokumaci, E. (2009). *Mean and Variance Value-Added Indicators With Multilevel Shrinkage: Application to a Multi-District Statewide Value-Added System*. Paper presented at the American Education Finance Association Annual Conference, Nashville, Tennessee.

Student Characteristics Controlled for in the Model

Value-added models evaluate teacher or school effectiveness by tracking student test score growth between testing periods using statistical techniques accounting for factors that could also impact student learning but are beyond the control of teachers and schools. When appropriate and the requisite data are available, the 2014-15 value-added models will control for the following characteristics at the student, classroom, and school levels:

- Prior achievement
- Gifted and talented status
- Special education status
- Free and reduced-price lunch eligibility status
- English Language Learner (ELL) status
- Fluent English Proficient (FEP) status
- Migrant status
- Homeless status
- Student mobility status
- Student attendance rate in prior academic year

Assessments Used to Measure Value-Added Student Growth

The individual and school value-added contributions to student learning are measured using students' test scores on the Galileo, Custom, and GOLD Assessments. We refer to these measures as the **VAM-Z**, **VAM-G, VAM-C,** and **VAM-E**, respectively.

- THE VAM-Z measure of student growth is based on student test scores in ELA and math on the state assessment, AzMERIT.
- The VAM-G measure of student growth is based on student test scores in reading, math, science, and writing on the Galileo Assessments.
- The VAM-C measure of student growth is based on student test scores on the Custom Assessments in social studies, music, band, choir, physical education, theatre, dance, art, Tech Literacy, and Transition in a range of elementary, middle, and high school grades. MCESA, in collaboration with approximately 40 Local Education Agencies, developed the Custom Assessments for the non-state-tested subject areas to support the collection of valid and reliable assessment data to measure student academic progress.
- The VAM-E measure of student growth is based on student test scores on the GOLD Assessment for early childhood education published by Teaching Strategies.

What Is Categorical Growth Analysis?

Categorical Growth Analysis considers the relationship between the growth observed for a group of students over a given time period and the growth expected for those students in that time period. Categorical Growth Analysis employs a well-established common statistical test, the repeated measures t-test, to evaluate whether the difference between observed growth and expected growth is significant for the group of students for which a teacher/principal is responsible.

- Callahan (2013). Categorical Growth Analysis: A Method Involving the Repeated-Measure T-Test. Assessment Technology Incorporated.

Benefits of Using Categorical Student Growth Measures

With regard to its use in instructional and educator evaluation systems, the practical benefits of CGA include the following:

- Educators in REIL districts have used the Galileo Assessments and CGA scores for a number of years to assess student growth and inform instructional practices.
- CGA measures are based on student growth rather than on achievement, which provides important signals regarding instructional effectiveness on students across the entire performance distribution.

Assessments Used to Measure Categorical Student Growth

The individual and school categorical growth contributions to student learning are measured using students' test scores on the Galileo Assessments. We refer to this measure as the **CGA-G**. The CGA-G measure of student growth is based on student test scores in reading, math, science, and writing on the Galileo Assessments in grades K-12 (subject dependent).

Alternate Measures of Student Growth

Some educators may have special circumstances where it is not possible to conduct VAM or CGA. For example, a teacher may be responsible for a small number of students, or a class

may not have an available test that has been vetted as reliable and valid. In those cases, alternate growth measures may be employed if appropriate data are available and the measures are sufficiently valid and reliable for the purposes of gauging student growth.

Types of measures may include:

- **Piggyback Method**: This approach will be applied to educators who instruct students in subject areas that are not covered by the Custom Assessments or Galileo Assessments. Specifically, the Individual Growth component for the REIL Score will be measured using a VAM student growth model and Galileo Assessments data from the students an educator instructs, but in a subject area different than the subject area taught.
- **Percent Met Growth Method**: This approach will be applied to educators who instruct fewer than 10 students in every subject-area and grade-level combination. For this approach, the Individual Growth component for the REIL Score will be measured by examining the percent of students who met their expected growth in the VAM student growth model.
- **LOI Student Progress Element Method:** This approach will be applied to educators who instruct fewer than 10 eligible students in any and all subject areas covered by the Galileo, Custom, and/or GOLD Assessments. The LOI Student Progress Element measure is calculated by averaging an educator's LOI student progress element score (0-5) across their respective observation cycles (1-5).

Frequently Asked Questions about Student Growth Measures

Our student population is highly mobile and students often transfer in and out of the school throughout the year. Will these students be included in our growth results?

For the 2014-15 REIL Score, mobile students may be included in student growth measures if educators, school leaders, and district leaders attribute students through the assessment confirmation process to the Galileo and Custom Assessments. All students included in the assessment confirmation process will be used in the CGA student growth measure using Galileo Assessments, including students who may not have been enrolled a full academic year. The Arizona Department of Education (ADE) will identify students who are enrolled in the school for the full academic year, as defined by enrollment at the school during the first 10 days and enrollment at the school during the final 10 days. The VAM student growth measures may only include students who are identified as full academic year, which in some cases may be a subset of the students included in the CGA student growth measure. The VAM student growth measure will also control for the effects of student mobility on student growth by including a covariate for students who are new to the school at the beginning of the school year owing to non-promotional school transfers.[3] The CGA student growth measure does not include a similar control for student mobility.

[3] This variable is designed to capture mobility that is not due to normal promotions from elementary to middle school and middle school to high school. Prior studies have found this type of mobility associates with lower academic achievement (Ballou, Sanders, & Wright, 2004).

I have heard of SGP. Is that the same thing as VAM or CGA?

The Student Growth Percentiles (SGP) model is different than the VAM and CGA student growth models used for REIL Scores. The SGP model assigns a percentile rank to students after comparing a student's actual score to the actual scores of other students with similar past test scores. The student growth percentile ranks for growth are relative to other students during the same time period. In the SGP model, an educator is assigned the median SGP of all the assigned students. Unlike the VAM, but similar to the CGA, the SGP model does not account for student background characteristics.[4]

I don't know how to interpret value-added model teacher results.

VAM estimates provide information about how much an educator contributed to student learning in a particular subject-area and in a particular year. To generate teacher results, VAM controls for factors outside of a teacher's control and then compares actual scores with expected scores for students assigned to the teacher. All VAM growth measures are expressed as standardized scores. These standardized scores benchmark the performance of a teacher's or school's students relative to the average level of performance in a given student population, after taking into account their prior test scores and demographic characteristics. Specifically, each growth measure is expressed in **Standard Deviations** relative to the population average. The teacher effects are standardized using data from the REIL districts. A positive teacher result indicates that the teacher was responsible for more student learning occurring in that classroom than what would be expected to occur in a similar classroom with students of similar background characteristics.

I have heard that teacher results from value-added models are significantly impacted by differences in the students assigned to teachers.

VAM compares each student's actual test score to an expected test score that is based on what is typical for students with similar pre-test scores, after controlling for student, classroom, and school characteristics. For example, the actual test scores of students who are English Language Learners (ELL) or eligible for free- or reduced-price lunch (FRL) will be compared with the expected test scores for similar students. An educator responsible for students who are lower performing on the pre-test but make academic growth that is larger than expected can generate a larger teacher effect from VAM than an educator responsible for higher performing students who make the academic growth that was expected for them. In this regard, VAM helps level the playing field and enables educators to demonstrate the impact of their instruction on student learning.

[4] Walsh, E., and Isenberg, E. (2013). *How Does a Value-Added Model Compare to the Colorado Growth Model?* Washington, DC: Mathematica Policy Research.

Why do different student growth models using the same data produce different results?

The primary reasons why student growth models (VAM, CGA, or SGP) may produce different results using the same data are due to differences in: (1) the students who are linked to educators; (2) the way in which growth expectations are calculated; and (3) how the models control for student, classroom, and school characteristics. However, results from different student growth models using the same data are correlated, which means that for the majority of educators, the results will be comparable.

What causes REIL Scores to vary from year to year?

REIL Scores may vary from year to year because of variation in the components that comprise a REIL Score, as well as variation in the student growth models. Results from both of the student growth models (VAM and CGA) may fluctuate from year to year for some teachers. This fluctuation can be the result of a variety of reasons, including the quality of the proctoring of the student assessment and variation in the performance of student cohorts. However, for the vast majority of educators, teacher results from student growth models are robust from year to year and reflect how much an educator contributed to student learning.

When I look in the Assessment System (e.g., Galileo or PCG) where my student assessment data is displayed, I see data and test results. How does that information connect with the VAM or CGA scores?

The Individual Growth and School Growth components of REIL Scores are based on VAM or CGA that use scale scores in sophisticated statistical calculations. The resultant VAM or CGA estimates are then run through a conversion chart to identify that measure's REIL Performance Score and corresponding REIL Score points. The Assessment System does not display VAM or CGA calculations or conversions used in the REIL Score. See the REIL Score practical guide for more information about the actual calculations used in REIL Scores.

What is the score that students need to get on the post-test?

VAM and CGA are calculated annually based on how groups of students perform on the pre-test. The expected growth target for a post-test varies for each subgroup and varies each year. Therefore it is not possible to identify a particular score that needs to be achieved.

Key Terms in the Guidebook

Common 1 to 5 Scale
The scale on which the results of all performance measures are placed before they are combined to produce the REIL Score. Conversion charts are used to place the Total LOI Points, LOI 3+ Rate, Individual Teacher Growth Measures, Team Growth Measures, and School Growth Measures on the Common 1 to 5 Scale.

Conversion Charts
Charts that explain the criteria for translating results from the various LOI and student growth measures to the Common 1 to 5 Scale.

Galileo Assessments Categorical Growth Measure (CGA-G)
A growth measure developed by Assessment Technology Incorporated (ATI). This measure tracks whether students, on average, underperformed, met, or outperformed their test score growth expectations based on their mastery of Arizona state content standards from the fall-to-spring administrations of the assessment.

Galileo Assessments (VAM-G) and Custom Assessment (VAM-C) Value-Added Modeling
An estimate of the contribution of an individual teacher or school to student growth. A value-added estimate represents the difference between students' actual and predicted test scores, where the predicted test scores are determined based on students' prior achievement and demographic characteristics.

The Learning Observation Instrument (LOI)
The instrument used to measure the quality of teachers' instructional practice through classroom observations. The LOI is comprised of six rubrics: Content, Formative Assessment, Instructional Strategies, Learner Engagement, Learning Community, and Professional Responsibilities.

LOI 3+ Rate
The number of LOI element ratings that teachers receive from all observation cycles that are rated a 3 or higher on the LOI rubrics.

LOI Observation Cycle
The three phases in each evaluation of classroom instruction: Pre-Conference, Observation, and Post-Conference. Teachers are expected to complete multiple observation cycles in 2014-15. A single observation cycle should take ten school days to complete.

Performance Score
The 1 to 5 score associated with each of the REIL Scorecard's performance measures: the Total LOI Points, LOI 3+ Rate, Individual Teacher Growth Measures, and School Growth Measures.

REIL Components
The REIL Scorecard's three categories of performance measures: Classroom Observation, Individual Growth, and School Growth.

REIL Score
The measure of educator effectiveness determined by combining a teacher's performance on the five REIL Components. The REIL Score is then used to assign state performance classifications and REIL Awards. The REIL Score will range from 100 to 500.

Scale Score
A conversion of a student's raw score on an assessment to a common scale that allows for numerical comparison of that student's score to the scores of other students who took different versions of that test.

Standard Deviation
A measure of the extent to which the scores from an assessment vary from the mean score for that assessment. Standard deviations help determine the significance of differences between scores, whether they be students' test scores on a standardized assessment or educators' scores on an observational assessment.

State Performance Classifications
The four evaluation designations that districts must assign to Arizona classroom teachers: Ineffective, Developing, Effective, and Highly Effective. In the REIL system, the "Effective" category is partitioned into "Effective 1" and "Effective 2" in order to differentiate performance awards.

Total LOI Points
The total number of points that teachers accumulate from their evaluators' ratings of LOI elements across all observation cycles.

Rewarding Excellence in Instruction and Leadership

Practical Guidebook for Teachers:

Components of the 2015-2016 REIL Score

MCESA
Maricopa County Education Service Agency

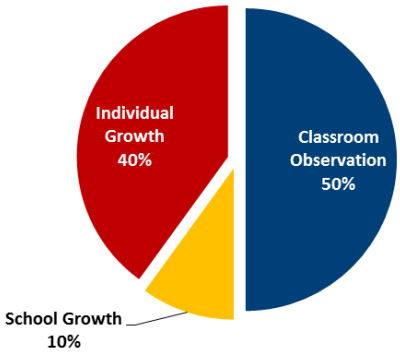
What is the Purpose of the Practical Guidebook?

The purpose of the **Practical Guidebook** is to provide you with information on how your REIL Score will be calculated for the 2015-16 school year. This guidebook answers the following questions:

- How will observation data and student growth estimates be converted into performance scores to inform your REIL Score?
- How will your REIL Score be calculated based on the observation and student growth components?
- How will your REIL Score be used to determine your performance classification?

As shown in Figure 1, the 2015-16 REIL performance-based evaluation system has three major components: Classroom Observation (50 percent), Individual Growth (40 percent), and School Growth (10 percent).

Figure 1. Components of the REIL Performance Evaluation System



In general, your evaluation results within each component are converted to performance scores on a **Common 1 to 5 Scale**. Each component's performance scores are then combined to calculate a final REIL Score and an aligned performance classification.

The subsequent sections of this guidebook provide further details about REIL Score calculations. For more information regarding the measures discussed in this document, please refer to the Conceptual Guidebook.

Converting LOI and Student Growth Measures

Learning Observation Instrument (LOI)/Special Education Overlay Measures

The two observation measures used are the *Total Points* and *3+ Rate*. Both measures utilize the observation data captured throughout the 2015-16 school year. The conversion to a performance score takes into consideration the number of observation cycles completed and which instrument was used.

LOI/Overlay Total Points Conversion

Step 1: Add up the total amount of LOI/Overlay points during the 2014-2015 school year. For example, let's take a look at Teacher A's LOI observation cycle report from last school year.

Cycle 1 Total Points =	72 out of 110 possible points
Cycle 2 Total Points =	89 out of 110 possible points
Cycle 3 Total Points =	94 out of 110 possible points
Cycle 4 Total Points =	101 out of 110 possible points
LOI Total Points =	356 out of 440 possible points

Step 2: Convert the total points to a performance score.

Teacher A received a performance score of 4.5, based on receiving 356 points over 4 observation cycles (see chart below). This performance score is used in the calculation of the REIL score.

Performance Score	Total LOI Points														
	1 Cycle			2 Cycles			3 Cycles			4 Cycles			5 Cycles		
	Min		Max	Min		Max	Min		Max	Min		Max	Min		Max
1	0	–	32	0	–	66	0	–	98	0	–	131	0	–	164
1.5	33	–	43	67	–	87	99	–	131	132	–	175	165	–	219
2	44	–	53	88	–	107	132	–	161	176	–	215	220	–	269
2.5	54	–	63	108	–	127	162	–	191	216	–	255	270	–	319
3	64	–	72	128	–	145	192	–	219	256	–	292	320	–	365
3.5	73	–	80	146	–	160	220	–	241	293	–	321	366	–	402
4	81	–	87	161	–	175	242	–	263	322	–	351	403	–	439
4.5	88	–	94	176	–	188	264	–	281	352	–	375	440	–	469
5	95	–	110	189	–	220	282	–	330	376	–	440	470	–	550

***The LOI Overlay conversion chart is located in the appendix**

LOI/Overlay 3+ Rate Conversion

Step 1: Total up the number of scores that are "3" or higher, across all observation cycles. Teacher A had 81 out of 88 element scores that received a "3" or higher" (see chart below).

Cycle 1 LOI 3+ Rate =	18 out of 22 element scores
Cycle 2 LOI 3+ Rate =	21 out of 22 element scores
Cycle 3 LOI 3+ Rate =	20 out of 22 element scores
Cycle 4 LOI 3+ Rate =	22 out of 22 element scores
LOI 3+ Rate =	81 out of 88 element scores

Step 2: Use the LOI 3+ Rate Conversion Chart to identify the performance score.

Teacher A received a performance score of 4 (see chart below). This performance score is then used in the calculation of the REIL score.

Performance Score	Number of Elements Scored 3 or Higher on LOI														
	1 Cycle			2 Cycle			3 Cycles			4 Cycles			5 Cycles		
	Min		Max	Min		Max	Min		Max	Min		Max	Min		Max
1	0	–	5	0	–	10	0	–	15	0	–	20	0	–	25
1.5	6	–	8	11	–	17	16	–	26	21	–	35	26	–	43
2	9	–	11	18	–	23	27	–	35	36	–	47	44	–	59
2.5	12	–	14	24	–	29	36	–	44	48	–	59	60	–	74
3	15	–	18	30	–	36	45	–	54	60	–	72	75	–	91
3.5	19	–	19	37	–	39	55	–	59	73	–	79	92	–	98
4	20	–	20	40	–	41	60	–	62	80	–	83	99	–	104
4.5	21	–	21	42	–	43	63	–	65	84	–	87	105	–	109
5	22	–	22	44	–	44	66	–	66	88	–	88	110	–	110

***The LOI Overlay conversion chart is located in the appendix**

In Summary, Teacher A received a 4.5 for LOI Total Points and a 4 for LOI 3+ Rate. These performance scores will be placed on his/her scorecard in order to calculate the REIL Score.

Student Growth Measures

A variety of student growth models are utilized in order to measure individual, school, and district-level growth across a wide range of teaching assignments. The *Conceptual Guidebook* provides additional information regarding the Value-Added Model growth measure, Categorical Growth Analysis, Percent Met Growth Method, and Practice Related Growth Index. Basis Policy Research applies the statistical calculations to develop the growth estimates for each method. The following sections of this guidebook show how the growth estimates are converted into a performance score and the corresponding conversion charts.

Value-Added Model Conversion

The Value-Added Model is applied to AzMERIT assessment data (VAM-Z), Galileo assessment data (VAM-G), Custom assessment data (VAM-C), GOLD data (VAM-E), & MSAA/NCSC (VAM-M). Basis Policy Research establishes a composite growth estimate for each subject.

Example of Teacher A's Galileo & Custom assessments growth estimates:

Individual Growth	Subject	Student Count	Composite Growth Estimate
VAM-Z	Reading	24	1.05
	Mathematics	21	-0.30
VAM-G	Reading	25	0.98
	Mathematics	20	-0.05
VAM-C	Social Studies	25	1.15

In order to calculate a composite performance score, the subject-level composite growth is converted to an initial performance score. Below is the conversion chart for VAM-G, VAM-C, VAM-E, & VAM-Z.

Method to Evaluate Student Growth	Growth Measures	Benchmark Population	Performance Scores								
			1	1.5	2	2.5	3	3.5	4	4.5	5
Value-Added	VAM-G,C,E*	REIL/REIL-TNG	below -1.75	-1.75 to -1.26	-1.25 to -.76	-.75 to .26	-.25 to +.25	+.26 to +.75	+.76 to +1.25	+1.26 to +1.75	above +1.75

* Galileo, Custom, and GOLD

Method to Evaluate Student Growth	Growth Measures	Benchmark Population	Performance Scores								
			1	1.5	2	2.5	3	3.5	4	4.5	5
Value-Added	VAM-Z,M*	AZ	below -1.75	-1.75 to -1.26	-1.25 to -.76	-.75 to -.26	-.25 to +.25	+.26 to +.75	+.76 to +1.25	+1.26 to +1.75	above +1.75

* AzMERIT & MSAA (NCSC)

Based on the conversion chart, the subject-level performance scores for Teacher A would be as follows:

Individual Growth	Subject	Student Count	Composite Growth Estimate	Performance Scores per Subject
VAM-Z	Reading	24	1.05	4
	Mathematics	21	-0.30	2.5
VAM-G	Reading	25	0.98	4
	Mathematics	20	-0.05	3
VAM-C	Social Studies	25	1.15	4

In the example above, VAM-G still needs to be rolled up into a composite performance score in order to be utilized for the REIL Score Calculation. Since Teacher A has more students in his/her reading class, the weighting of reading will be greater than mathematics. VAM-G is based on a total of 45 student growth estimates so the student count per subject will be divided by 45 to determine the weight.

Individual Growth	Subject	Student Count	Composite Growth Estimate	Performance Scores per Subject	Weights
VAM-Z	Reading	24	1.05	4	24/45 = 53.33%
	Mathematics	21	-0.30	2.5	21/45 = 46.67%
VAM-G	Reading	25	0.98	4	25/45 = 55.56%
	Mathematics	20	-0.05	3	20/45 = 44.46%
VAM-C	Social Studies	25	1.15	4	100%

The final step to calculating the composite performance score is to multiply the performance score by the weights and find the total.

Individual Growth	Subject	Performance Scores per Subject	Weights	Composite Performance Score
VAM-Z	Reading	4	53.33%	(4 x .5333) + (2.5 x .4667) = 3.30
	Mathematics	2.5	46.67%	
VAM-G	Reading	4	55.56%	(4 x .5556) + (3 x .4446) = 3.56
	Mathematics	3	44.46%	
VAM-C	Social Studies	4	100%	4

Based on weighting, the composite performance scores for Teacher A are:
VAM-G = 3.30
VAM-G = 3.56
VAM-C = 4

Categorical Growth Analysis Conversion

The process for calculating a composite performance score for CGA-G is similar to the Value-Added Model Conversion. The difference is that the initial growth estimates are calculated by Assessment Technology, Incorporated (ATI) with the CGA scoring levels as follows:

"Expected Growth Not Maintained" – 1
"Expected Growth Maintained" – 2
"Expected Growth Exceeded" – 3

Teacher A would receive a CGA score for her reading and mathematics classes based on students who have valid pre-test and post-test scores.

Individual Growth	Subject	Student Count	CGA Score
CGA-G	Reading	27	2
	Mathematics	23	3

When Basis Policy Research receives the CGA score, they convert the CGA score to match the levels of performance scores used in the REIL Score model.

Method to Evaluate Student Growth	Assessment	Growth Measure	Benchmark Population	Performance Scores				
				1	2	3	4	5
Categorical Growth	Galileo	CGA-G	REIL/REIL-TNG	1.0 - 1.4	1.5 - 1.7	1.8 - 2.2	2.3 - 2.5	2.6 - 3.0

Based on the conversion chart, the subject-level performance scores for Teacher A would be as follows:

Individual Growth	Subject	Student Count	CGA Score	Performance Scores per Subject
CGA-G	Reading	27	2	3
	Mathematics	23	3	5

In the example above, CGA-G still needs to be rolled up into a composite performance score in order to be utilized for the REIL Score Calculation. Since Teacher A has more students in his/her reading class, the weighting of reading will be greater than mathematics. CGA-G is based on a total of 50 student growth estimates so the student count per subject will be divided by 50 to determine the weight.

Individual Growth	Subject	Student Count	CGA Score	Performance Scores per Subject	Weights
CGA-G	Reading	27	2	3	27/50 = 54%
	Mathematics	23	3	5	23/50 = 46%

The final step to calculating the composite performance score is to multiply the performance score by the weights and find the total.

Individual Growth	Subject	Performance Scores per Subject	Weights	Composite Performance Score
CGA-G	Reading	3	27/50 = 54%	(3 x .54) + (5 x .46) = 3.92
	Mathematics	5	23/50 = 46%	

Based on weighting, the CGA-G composite performance score for Teacher A is 3.92.

Percent Met Growth Method Conversion

This approach will be applied to educators who instruct fewer than 10 students in every subject-area and grade-level combination. For this approach, the Individual Growth component for the REIL Score will be measured by examining the percent of students who met their expected growth in the VAM student growth model. Once the percentage of student meeting growth is computed, standard deviation is calculated to determine a performance score for the "Met" measure (see chart below).

Method to Evaluate Student Growth	Growth Measures	Benchmark Population	Performance Scores								
			1	1.5	2	2.5	3	3.5	4	4.5	5
Value-Added	MET-G,C,E*	REIL/REIL-TNG	below -1.75	-1.75 to -1.26	-1.25 to -.76	-.75 to .26	-.25 to +.25	+.26 to +.75	+.76 to +1.25	+1.26 to +1.75	above +1.75

* Galileo, Custom, and GOLD

Method to Evaluate Student Growth	Growth Measures	Benchmark Population	Performance Scores								
			1	1.5	2	2.5	3	3.5	4	4.5	5
Value-Added	MET-Z,M*	AZ	below -1.75	-1.75 to -1.26	-1.25 to -.76	-.75 to -.26	-.25 to +.25	+.26 to +.75	+.76 to +1.25	+1.26 to +1.75	above +1.75

* AzMERIT & MSAA (NCSC)

Performance Related Growth Index Conversion

This approach will be applied to educators who instruct fewer than 10 eligible students in any and all subject areas covered by the AzMERIT, Galileo, Custom, and/or GOLD Assessments. The Performance Related Growth measure is calculated by summing the observation scores from the five identified elements: *Student Progress*, *Practice/Aligned Activity*, *Teacher-to-Student Interaction*, *Authentic Engagement*, and *Routines & Procedures*. The total points is converted to a performance score for the PRG measure, based on the number of observations completed (see chart below).

Performance Score	Total LOI PRG Points														
	1 Cycle			2 Cycles			3 Cycles			4 Cycles			5 Cycles		
	Min		Max	Min		Max	Min		Max	Min		Max	Min		Max
1	0	–	5	0	–	10	0	–	15	0	–	20	0	–	25
1.5	6	–	8	11	–	16	16	–	24	21	–	32	26	–	40
2	9	–	12	17	–	24	25	–	36	33	–	48	41	–	60
2.5	13	–	15	25	–	30	37	–	45	49	–	60	61	–	75
3	16		19	31		38	46		57	61		76	76		95
3.5	20		22	39		44	58		66	77		88	96		110
4	23	–	23	45	–	46	67	–	69	89	–	92	111	–	115
4.5	24	–	24	47	–	48	70	–	72	93	–	96	116	–	120
5	25		25	49		50	73		75	97		100	121		125

Calculating the REIL Score & Performance Classification

Scorecard Matrix

Within the REIL Score model, numerous scorecards are developed in order to represent the various teaching assignments across the REIL alliance. Shown below is an example of scorecards associated with the majority of classroom teachers.

2015-2016 REIL Scorecards Group 1 Teachers										
	LOI Measures		Individual Growth					School Growth		
REIL Scorecard Code	LOI or Overlay Total Points Weight	LOI or Overlay 3+ Weight	VAM-Z	VAM-G	CGA-G	VAM-C	VAM-E	VAM-Z	VAM-G	CGA-G
1.1	40%	10%	40%					5%	3%	2%
1.2	40%	10%	30%	10%				5%	3%	2%
1.3	40%	10%	25%	10%	5%			5%	3%	2%
1.4	40%	10%	20%	10%	5%	5%		5%	3%	2%
1.5	40%	10%	15%	10%	5%	5%	5%	5%	3%	2%
1.6	40%	10%	20%	10%	5%		5%	5%	3%	2%
1.7	40%	10%	30%	10%				5%	3%	2%
1.8	40%	10%	25%	10%		5%		5%	3%	2%
1.9	40%	10%	20%	10%		5%	5%	5%	3%	2%
1.10	40%	10%	25%	10%			5%	5%	3%	2%
1.11	40%	10%	30%		10%			5%	3%	2%
1.12	40%	10%	25%		10%	5%		5%	3%	2%
1.13	40%	10%	20%		10%	5%	5%	5%	3%	2%
1.14	40%	10%	25%		10%		5%	5%	3%	2%
1.15	40%	10%	30%			10%		5%	3%	2%
1.16	40%	10%	25%			10%	5%	5%	3%	2%
1.17	40%	10%	30%				10%	5%	3%	2%

The placement on a specific scorecard is driven by the observation and assessment data tied to a particular teacher. Going back to the example of Teacher A, let's look at what data have been connected.

Measure	Performance Score
LOI Total Points	4.5
LOI 3+ Rate	4
VAM-Z	3.30
VAM-G	3.56
CGA-G	3.92
VAM-C	4

Based on the measures calculated, Teacher A would be placed on scorecard **1.4**. The observation, individual growth, and school-level growth measures are inputted on the scorecard. Since each measure has a specific weight, the performance scores will be multiplied accordingly in order to get the total points.

Teacher A's REIL Score will now be calculated in order to demonstrate this final step.

Scorecard: **1.4**		Performance Score (1-5)		Scorecard Weights		Points Earned	Possible Points
Observation Measures	LOI Total Points	4.5	x	40	=	180	200
	LOI 3+ Rate	4	x	10	=	40	50
Individual Growth Measures	VAM-Z	3.30	x	20	=	66	100
	VAM-G	3.56	x	10	=	36	50
	CGA-G	3.92	x	5	=	20	25
	VAM-C	4	x	5	=	20	25
School-level Measures	VAM-Z	4.12	x	5	=	21	25
	VAM-G	4.26	x	3	=	13	15
	CGA-G	3.18	x	2	=	6	10
				REIL Score		**402**	500

***Points earned are rounded to the nearest whole number**

Determine Performance Classifications

The REIL Score also results in the generation of a performance classification. The state requires all classroom teachers to receive one of the four classifications: Highly Effective, Effective, Developing, or Ineffective. There may be further LEA-specific sub-classifications (e.g., Effective 1 and Effective 2). As shown in Table below, cut points are placed on the REIL Score continuum to identify the range of scores associated with each performance classification. For example, Teacher A's REIL Score was a 402 which places him/her in the "Highly Effective" range.

Table 7. Converting REIL Scores to Performance Classifications

REIL Score Range	Performance Classification
400 to 500	Highly Effective
350 to 399	Effective 2
300 to 349	Effective 1
200 to 299	Developing
100 to 199	Ineffective

Key Terms in the Guidebook

Common 1 to 5 Scale

The scale on which the results of all performance measures are placed before they are combined to produce the REIL Score. Conversion charts are used to place the Total LOI Points, LOI 3+ Rate, Individual Teacher Growth Measures, and School Growth Measures on the Common 1 to 5 Scale.

Conversion Charts

Charts that explain the criteria for translating results from the various LOI and student growth measures to the Common 1 to 5 Scale.

Galileo Categorical Growth Measure (CGA-G)

A criterion-referenced growth measure developed by Assessment Technology Incorporated (ATI). This measure tracks whether students, on average, underperformed, met, or outperformed their test score growth expectations based on their mastery of Arizona state content standards from the fall-to-spring administrations of the assessment. A similar methodological approach will be applied to students' results on the Custom Assessments (CGA-C) when limited test taker counts preclude the use of value-added measures.

The Learning Observation Instrument (LOI)

The instrument used to measure the quality of teachers' instructional practice through classroom observations. The LOI is comprised of six rubrics: Content, Formative Assessment, Instructional Strategies, Learner Engagement, Learning Community, and Professional Responsibilities.

LOI 3+ Rate

The number of LOI element ratings that teachers receive from all observation cycles that are rated a 3 or higher on the LOI rubrics.

Performance Score

The 1 to 5 score associated with each of REIL Scorecard's performance measures: the Total LOI Points, LOI 3+ Rate, Individual Teacher Growth Measures, and School Growth Measures.

REIL Score

The measure of educator effectiveness determined by combining a teacher's performance on the five REIL Components. The REIL Score is then used to assign state performance classifications and REIL Awards. The REIL Score will range from 100 to 500.

State Performance Classifications

The four evaluation designations that districts must assign to Arizona classroom teachers: Ineffective, Developing, Effective, and Highly Effective. In the REIL system, the "Effective" category is partitioned into "Effective 1" and "Effective 2" in order to differentiate performance awards.

Total LOI Points

The total number of points that teachers accumulate from their evaluators' ratings of LOI elements across all observation cycles.

REIL Scorecard Weights

The proportion of the REIL Score that is based on each performance measure. Weights are applied to each performance measure before they are added together to create the REIL Score.

Appendix

LOI Conversion Charts

Performance Score	Total LOI Points														
	1 Cycle			2 Cycles			3 Cycles			4 Cycles			5 Cycles		
	Min		Max	Min		Max	Min		Max	Min		Max	Min		Max
1	0	–	32	0	–	66	0	–	98	0	–	131	0	–	164
1.5	33	–	43	67	–	87	99	–	131	132	–	175	165	–	219
2	44	–	53	88	–	107	132	–	161	176	–	215	220	–	269
2.5	54	–	63	108	–	127	162	–	191	216	–	255	270	–	319
3	64	–	72	128	–	145	192	–	219	256	–	292	320	–	365
3.5	73	–	80	146	–	160	220	–	241	293	–	321	366	–	402
4	81	–	87	161	–	175	242	–	263	322	–	351	403	–	439
4.5	88	–	94	176	–	188	264	–	281	352	–	375	440	–	469
5	95	–	110	189	–	220	282	–	330	376	–	440	470	–	550

Performance Score	Number of Elements Scored 3 or Higher on LOI														
	1 Cycle			2 Cycle			3 Cycles			4 Cycles			5 Cycles		
	Min		Max	Min		Max	Min		Max	Min		Max	Min		Max
1	0	–	5	0	–	10	0	–	15	0	–	20	0	–	25
1.5	6	–	8	11	–	17	16	–	26	21	–	35	26	–	43
2	9	–	11	18	–	23	27	–	35	36	–	47	44	–	59
2.5	12	–	14	24	–	29	36	–	44	48	–	59	60	–	74
3	15	–	18	30	–	36	45	–	54	60	–	72	75	–	91
3.5	19	–	19	37	–	39	55	–	59	73	–	79	92	–	98
4	20	–	20	40	–	41	60	–	62	80	–	83	99	–	104
4.5	21	–	21	42	–	43	63	–	65	84	–	87	105	–	109
5	22	–	22	44	–	44	66	–	66	88	–	88	110	–	110

LOI SpED Overlay Conversion Charts

Performance Score	Total SpED Overlay Points														
	1 Cycle			2 Cycles			3 Cycles			4 Cycles			5 Cycles		
	Min		Max	Min		Max	Min		Max	Min		Max	Min		Max
1	0	–	25	0	–	51	0	–	76	0	–	101	0	–	127
1.5	26	–	33	52	–	67	77	–	101	102	–	135	128	–	169
2	34	–	41	68	–	82	102	–	124	136	–	166	170	–	208
2.5	42	–	48	83	–	98	125	–	147	167	–	197	209	–	246
3	49	–	55	99	–	112	148	–	169	198	–	225	247	–	282
3.5	56	–	62	113	–	123	170	–	186	226	–	248	283	–	310
4	63	–	67	124	–	135	187	–	203	249	–	271	311	–	339
4.5	68	–	72	136	–	145	204	–	217	272	–	290	340	–	362
5	73	–	85	146	–	170	218	–	255	291	–	340	363	–	425

Performance Score	Number of Elements Scored 3 or Higher on SpED Overlay														
	1 Cycle			2 Cycle			3 Cycles			4 Cycles			5 Cycles		
	Min		Max	Min		Max	Min		Max	Min		Max	Min		Max
1	0	–	3	0	–	7	0	–	11	0	–	15	0	–	19
1.5	4	–	6	8	–	13	12	–	20	16	–	27	20	–	33
2	7	–	9	14	–	18	21	–	27	28	–	36	34	–	45
2.5	10	–	11	19	–	22	28	–	34	37	–	45	46	–	57
3	12	–	13	23	–	28	35	–	42	46	–	55	58	–	70
3.5	14	–	14	29	–	30	43	–	45	56	–	61	71	–	76
4	15	–	15	31	–	31	46	–	48	62	–	64	77	–	80
4.5	16	–	16	32	–	33	49	–	50	65	–	67	81	–	84
5	17	–	17	34	–	34	51	–	51	68	–	68	85	–	85

Student Growth Measures Conversion Charts

Method to Evaluate Student Growth	Growth Measures	Benchmark Population	Performance Scores								
			1	1.5	2	2.5	3	3.5	4	4.5	5
Value-Added	VAM-G,C,E*	REIL/REIL-TNG	below -1.75	-1.75 to -1.26	-1.25 to -.76	-.75 to .26	-.25 to +.25	+.26 to +.75	+.76 to +1.25	+1.26 to +1.75	above +1.75

* Galileo, Custom, and GOLD

Method to Evaluate Student Growth	Growth Measures	Benchmark Population	Performance Scores								
			1	1.5	2	2.5	3	3.5	4	4.5	5
Value-Added	VAM-Z,M*	AZ	below -1.75	-1.75 to -1.26	-1.25 to -.76	-.75 to -.26	-.25 to +.25	+.26 to +.75	+.76 to +1.25	+1.26 to +1.75	above +1.75

* AzMERIT & MSAA (NCSC)

Method to Evaluate Student Growth	Assessment	Growth Measure	Benchmark Population	Performance Scores				
				1	2	3	4	5
Categorical Growth	Galileo	CGA-G	REIL/REIL-TNG	1.0 - 1.4	1.5 - 1.7	1.8 - 2.2	2.3 - 2.5	2.6 - 3.0

Method to Evaluate Student Growth	Growth Measures	Benchmark Population	Performance Scores								
			1	1.5	2	2.5	3	3.5	4	4.5	5
Value-Added	MET-G,C,E*	REIL/REIL-TNG	below -1.75	-1.75 to -1.26	-1.25 to -.76	-.75 to .26	-.25 to +.25	+.26 to +.75	+.76 to +1.25	+1.26 to +1.75	above +1.75

* Galileo, Custom, and GOLD

Method to Evaluate Student Growth	Growth Measures	Benchmark Population	Performance Scores								
			1	1.5	2	2.5	3	3.5	4	4.5	5
Value-Added	MET-Z,M*	AZ	below -1.75	-1.75 to -1.26	-1.25 to -.76	-.75 to -.26	-.25 to +.25	+.26 to +.75	+.76 to +1.25	+1.26 to +1.75	above +1.75

* AzMERIT & MSAA (NCSC)

Performance Score	Total LOI PRG Points														
	1 Cycle			2 Cycles			3 Cycles			4 Cycles			5 Cycles		
	Min		Max	Min		Max	Min		Max	Min		Max	Min		Max
1	0	–	5	0	–	10	0	–	15	0	–	20	0	–	25
1.5	6	–	8	11	–	16	16	–	24	21	–	32	26	–	40
2	9	–	12	17	–	24	25	–	36	33	–	48	41	–	60
2.5	13	–	15	25	–	30	37	–	45	49	–	60	61	–	75
3	16	–	19	31	–	38	46	–	57	61	–	76	76	–	95
3.5	20	–	22	39	–	44	58	–	66	77	–	88	96	–	110
4	23	–	23	45	–	46	67	–	69	89	–	92	111	–	115
4.5	24	–	24	47	–	48	70	–	72	93	–	96	116	–	120
5	25	–	25	49	–	50	73	–	75	97	–	100	121	–	125

MCESA

Maricopa County Education Service Agency

Rewarding Excellence in Instruction and Leadership

Practical Guidebook for Coaches:

Calculation of the 2014-2015 REIL Score

MCESA
Maricopa County Education Service Agency

What is the Purpose of the Practical Guidebook?

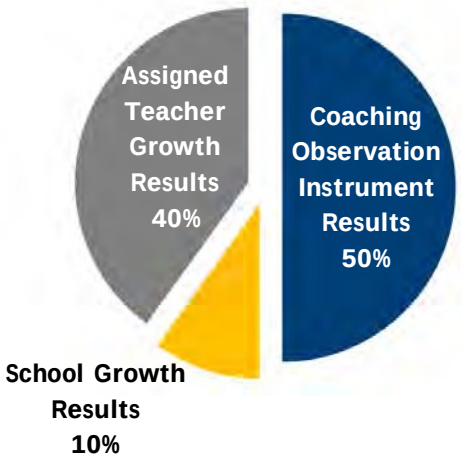
Purpose of the Guidebook

The purpose of this Practical Guidebook is to provide coaches with information on how their REIL Score was calculated for the 2014-15 school year. This guidebook answers the following questions:

- How will observation data and student growth estimates be converted into performance scores related to a coach's REIL Score?
- How will a coach's final REIL Score be calculated based on the observation and student growth components?
- How will a final REIL Score be used to determine a coach's performance classification?

As shown in Figure 1, the 2014-15 REIL performance evaluation system has three major components: Coaching Observation Instrument results (50 percent), student growth results of the assigned teacher cadre (40 percent), and school growth results (10 percent).

Components of the REIL Performance Evaluation System



In general, a coach's evaluation results on each component are converted to a **Performance Score** using a 1 to 5 scale. These performance scores are used to calculate a REIL-TNG Score that is then used to assign a performance classification to that coach.

Convert COI and Student Growth Measures

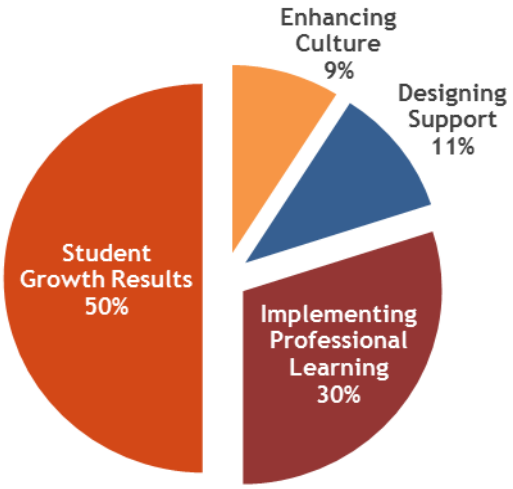
Coaching Observation Instrument (COI)

The COI is composed of three rubrics:

1. **Enhancing Culture**
2. **Designing Support**
3. **Implementing Professional Learning**

Across the three rubrics, a total of 23 unique elements are assessed and rated using a scale from 0 to 4. Evaluators rate each element on multiple occasions using evidence gathered through observations of the coach in different settings and through the review of documentation, including coaching plans, coaching data records, Educator Goal Plans, and stakeholder survey data. Over the school year, coaches will receive multiple ratings on the 23 elements within the COI's 3 rubrics. At the end of the school year, data from the individual element ratings are combined to determine a summative performance score on each of the rubrics. As shown in Figure 2, these rubrics individually contribute between 9 percent and 30 percent to a coach's REIL Score.

COI Observation Components of REIL Performance Evaluation System



Converting COI Rubric Results to Performance Scores

As previously noted, the individual element ratings for each COI rubric will be combined to determine a summative performance score for that rubric. This section details how performance scores were converted.

Step 1: For each element in the rubric, average all ratings received within the element, rounding to the tenth decimal. This produces one final rating for each of the rubric's elements. For example, let's take a look at Coach A's observation scores for the Enhancing Culture rubric.

Rubric	Subject	Ratings		Average of Ratings by Element
Enhancing Culture	Relationships	2	4	3
	Active Listening	3		3
	Collaboration	3	4	3.5
	Goal Orientation	4		4

Step 2: Sum the final element ratings within the rubric to determine the **Total COI Points Earned** for that rubric, again rounding to the tenth decimal.

Rubric	Subject	Ratings		Average of Ratings by Element
Enhancing Culture	Relationships	2	4	3
	Active Listening	3		3
	Collaboration	3	4	3.5
	Goal Orientation	4		4
			Total COI Points Earned	13.5

Step 3: Use the conversion chart (see chart below) to convert the total points earned on each rubric to a performance score on the Common 1 to 5 Scale.

Conversion of Total Rubric Points to REIL-TNG Performance Scores

REIL-TNG Performance Score	Enhancing Culture (4 Elements) 16 points possible	Designing Support (5 Elements) 20 points possible	Implementing Professional Learning (14 Elements) 56 points possible
5	>14.8	>18.5	>51.8
4	12.4 to 14.8	15.5 to 18.5	43.4 to 51.8
3	10.4 to 12.3	13.0 to 15.4	36.4 to 43.3
2	6.8 to 10.3	8.5 to 12.9	23.8 to 36.3
1	<6.8	<8.5	<23.8

Coach A received a performance score of 4 based on 13.5 Total COI Points Earned for the Enhancing Culture Rubric. The same steps are used to calculate performance scores for the other rubrics. Below is Coach A's performance scores for Designing Support & Implementing Professional Learning.

Rubric	Total COI Points Earned	Performance Score
Enhancing Culture	13.5	4
Designing Support	15.3	3
Implementing Professional Learning	52	5

Student Growth Measures

Multiple student growth models are utilized in order to measure assigned teacher cadre, school, and district-level growth across a wide range of teaching assignments. The Conceptual Guidebook provides details about the Value-Added Model & Categorical Growth Analysis which are used in a coach's REIL Score. Basis Policy Research applies the statistical calculations to develop the growth estimates for each method. The following sections of this guidebook show how the growth estimates are converted into a performance score and the corresponding conversion charts. The calculations applied to your REIL Score are shown on the scorecard drilldowns in RDSS: Profile.

Value-Added Model Conversion

The Value-Added Model is applied to Galileo assessment data (VAM-G), Custom assessment data (VAM-C), & GOLD data (VAM-E). Basis Policy Research establishes a composite growth estimate for each teacher by subject. In order to calculate a composite performance score, there are multiple levels of calculations that occur. The following sections will start with individual teacher growth estimates and roll up to a composite performance score.

Coach A is assigned to 2nd and 3rd grade teachers for support in math and reading. For our example, let's see how a composite growth estimate across grade levels for math is calculated. This composite growth estimate is the calculation that is converted to a performance score.

Growth Measure	Subject	Grade Level	Teacher	Student Count	Growth Estimate
VAM-G	Math	2nd	A	23	1.65
			B	19	.70
		3rd	C	28	.98
			D	20	1.13

Step 1: Calculate a composite growth estimate across teachers in the same grade level.

Since Teacher A has more students in his/her math class, the weighting of Teacher A will be greater than Teacher B. The weight is calculated by dividing the number of students in each class by the total number for the grade level.

Subject	Grade Level	Teacher	Student Count	Weights	Growth Estimate
Math	2nd	A	23	23/42 = 54.76%	1.65
		B	19	19/42 = 45.24%	.70
	3rd	C	28	28/48 = 58.33%	.98
		D	20	20/48 = 41.67%	1.13

The final step to calculating the composite estimate across teachers in the same grade level is to multiple the growth estimates by the weights and find the total.

Subject	Grade Level	Teacher	Student Count	Weights	Growth Estimate	Composite Growth Estimate Across Teachers
Math	2nd	A	23	54.76%	1.65	(1.65 x .5476) + (.70 x 45.24) = 1.22
		B	19	45.24%	.70	
	3rd	C	28	58.33%	.98	(.98 x .5833) + (1.13 x .4167) = 1.04
		D	20	41.67%	1.13	

Step 2: Calculate a composite growth estimate across grade levels.

The growth estimates have been rolled up into a composite growth estimate for each grade level. The weighting for each grade level needs to be calculated based on 3rd grade having more students.

Subject	Grade Level	Student Count	Weights	Composite Growth Estimate Across Teachers
Math	2nd	42	42/90 = 46.67%	1.22
	3rd	48	48/90 = 53.33%	1.04

After the weights are calculated, composite growth estimates across teachers is multiplied by the weights and totaled to calculate the composite growth estimate across grade levels.

Subject	Grade Level	Student Count	Weights	Composite Growth Estimate Across Teachers	Composite Growth Estimate Across Grade Levels
Math	2nd	42	46.67%	1.22	(1.22 x .4667) + (1.04 x .5333) = 1.12
	3rd	48	53.33%	1.04	

Step 3: Calculate the VAM-G composite performance score

In order to calculate a composite performance score, the subject-level composite growth is converted to an initial performance score. Below is the conversion chart for VAM-G, VAM-G, & VAM-E.

Method to Evaluate Student Growth	Growth Measures	Benchmark Population	Performance Scores								
			1	1.5	2	2.5	3	3.5	4	4.5	5
Value-Added	VAM-G,C,E	REIL/REIL-TNG	below -1.76	-1.75 to -1.26	-1.25 to -.76	-.75 to -.26	-.25 to +.25	+.26 to +.75	+.76 to +1.25	+1.26 to +1.75	above +1.76

Based on the conversion chart, the subject-level performance scores for Coach A would be as follows with the addition of reading:

Growth Measure	Subject	Student Count Across Grade Levels	Composite Growth Estimate Across Grade Levels	Performance Score
VAM-G	Math	90	1.12	4
	Reading	70	-.33	2.5

Weights are calculated to represent the different student counts by subject area.

Growth Measure	Subject	Student Count Across Grade Levels	Weights	Performance Score
VAM-G	Math	90	90/160 = 56.25%	4
	Reading	70	70/160 = 43.75%	2.5

The final step to calculating the composite performance score is to multiple the performance score by the weights and find the total.

Growth Measure	Subject	Weights	Performance Score	Composite Performance Score
VAM-G	Math	56.25%	4	(4 x .5625) + (2.5 x .4375) = 3.34
	Reading	43.75%	2.5	

The composite performance score for Coach A is 3.34 and will be used to calculate his/her REIL Score.

Categorical Growth Analysis Conversion

The process for calculating a composite performance score for CGA-G is similar to the Value-Added Model Conversion. The difference is that the initial growth estimates are calculated by Assessment Technology Incorporated (ATI) with the CGA scoring levels as follows:

"Expected Growth Not Maintained" – 1
"Expected Growth Maintained" – 2
"Expected Growth Exceeded" – 3

Coach A would receive a CGA estimate for supporting teachers in reading and mathematics classes based on students who have valid pre-test and post-test scores. The CGA estimates for each teacher will be rolled up into a composite growth estimate which will be converted to a performance score. For our example, we will calculate a math composite growth estimate across grade levels.

Growth Measure	Subject	Grade Level	Teacher	Student Count	CGA Estimate
CGA-G	Math	2nd	A	25	2
			B	22	3
		3rd	C	33	2
			D	24	1

Step 1: Calculate a composite growth estimate across teachers in the same grade level.

Since Teacher A has more students in his/her math class, the weighting of Teacher A will be greater than Teacher B. The weight is calculated by dividing the number of students in each class by the total number for the grade level.

Subject	Grade Level	Teacher	Student Count	Weights	Growth Estimate
Math	2nd	A	25	25/47 = 53.19%	2
		B	22	22/47 = 46.81%	3
	3rd	C	33	33/57 = 57.89%	2
		D	24	24/57 =42.11%	1

The final step to calculating the composite estimate across teachers in the same grade level is to multiple the growth estimates by the weights and find the total.

Subject	Grade Level	Teacher	Student Count	Weights	Growth Estimate	Composite Growth Estimate Across Teachers
Math	2nd	A	25	53.19%	2	(2 x .5319) + (3 x .4681) = 2.47
		B	22	46.81%	3	
	3rd	C	33	57.89%	2	(2 x .5789) + (1 x .4211) = 1.58
		D	24	42.11%	1	

Step 2: Calculate a composite growth estimate across grade levels.

The growth estimates have been rolled up into a composite growth estimate for each grade level. The weighting for each grade level needs to be calculated based on 3rd grade having more students.

Subject	Grade Level	Student Count	Weights	Composite Growth Estimate Across Teachers
Math	2nd	47	47/104 = 45.19%	2.47
	3rd	57	57/104 = 54.81%	1.58

After the weights are calculated, composite growth estimates across teachers is multiplied by the weights and totaled to calculate the composite growth estimate across grade levels.

Subject	Grade Level	Student Count	Weights	Composite Growth Estimate Across Teachers	Composite Growth Estimate Across Grade Levels
Math	2nd	47	45.19%	2.47	(2.47 x .4519) + (1.58 x .5481) = 1.98
	3rd	57	54.81%	1.58	

Step 3: Calculate the VAM-G composite performance score

In order to calculate a composite performance score, the subject-level composite growth is converted to an initial performance score. Below is the conversion chart for CGA-G.

Method to Evaluate Student Growth	Assessment	Growth Measure	Benchmark Population	Performance Scores				
				1	2	3	4	5
Categorical Growth	Galileo	CGA-G	REIL/REIL-TNG	1.0 - 1.4	1.5 - 1.7	1.8 - 2.2	2.3 - 2.5	2.6 - 3.0

Based on the conversion chart, the subject-level performance scores for Coach A would be as follows:

Growth Measure	Subject	Student Count Across Grade Levels	Composite Growth Estimate Across Grade Levels	Performance Score
CGA-G	Math	104	1.98	3
	Reading	75	1.63	2

Weights are calculated to represent the different student counts by subject area.

Growth Measure	Subject	Student Count Across Grade Levels	Weights	Performance Score
CGA-G	Math	104	104/179 = 58.10%	3
	Reading	75	75/179 = 41.90%	2

The final step to calculating the composite performance score is to multiple the performance score by the weights and find the total.

Growth				
				____

The composite performance score for Coach A is 2.58 and will be used to calculate his/her REIL Score.

Calculating the REIL Score & Performance Classification

Scorecard Matrix

Within the REIL Score model, numerous scorecards are developed in order to represent the various teaching assignments across the REIL alliance. Shown below is the 2014-15 REIL scorecard matrix for coaches.

2014-2015 REIL Scorecards Coaches												
	COI Measures			Assigned Teacher Cadre Growth				School Growth			District Growth	
REIL Score card Code	Enhancing Culture	Designing Support	Implementing Professional Learning	VAM-G	CGA-G	VAM-C	VAM-E	VAM-G	CGA-G	VAM-E	VAM-G	CGA-G
CH_01	9%	11%	30%	30%	10%			7%	3%			
CH_02	9%	11%	30%		40%			7%	3%			
CH_03	9%	11%	30%	25%	10%	5%		7%	3%			
CH_04	9%	11%	30%		30%	10%		7%	3%			
CH_05	9%	11%	30%			40%		7%	3%			
CH_06	9%	11%	30%				40%	7%	3%			
CH_07	9%	11%	30%	25%	10%		5%	7%	3%			
CH_08	9%	11%	30%		35%		5%	7%	3%			
CH_09	9%	11%	30%	20%	10%	5%	5%	7%	3%			
CH_10	9%	11%	30%		25%	10%	5%	7%	3%			
CH_11	9%	11%	30%			35%	5%	7%	3%			
CH_12	9%	11%	30%				40%			10%		
CH_13	12%	14%	39%					25%	10%			
CH_14	12%	14%	39%					20%	10%	5%		
CH_15	12%	14%	39%								25%	10%

The placement on a specific scorecard is driven by the observation and assessment data tied to a particular coach and assigned teacher cadre. Going back to the example of Coach A, let's look at what data have been connected.

Measures		Performance Score
Observation	Enhancing Culture	4
	Designing Support	3
	Implementing Professional Learning	5
Assigned Teacher Cadre	VAM-G	3.34
	CGA-G	2.58

Based on the measures calculated, Coach A would be placed on scorecard **CH_01**. The observation, assigned teacher cadre growth, and school-level growth measures are inputted on the scorecard. Since each measure has a specific weight, the performance scores will be multiplied accordingly in order to get the total points.

Coach A's REIL Score will now be calculated in order to demonstrate this final step.

Scorecard: **CH_01**		Performance Score (1-5)		Scorecard Weights		Points Earned	Possible Points
Observation Measures	Enhancing Culture	4	x	9	=	36	45
	Designing Support	3	x	11	=	33	55
	Implementing Professional Learning	5	x	30	=	150	150
Assigned Teacher Cadre Growth	CGA-G	3.34	x	30	=	100	150
	VAM-C	2.58	x	10	=	26	50
School-level Growth	VAM-G	3.25	x	7	=	23	35
	CGA-G	3.13	x	3	=	9	15
					REIL Score	377	500

***Points earned are rounded to the nearest whole number**

Determine Performance Classifications

The REIL Score also results in the generation of a performance classification. The state requires all coaches to receive one of the four classifications: Highly Effective, Effective, Developing, or Ineffective. There may be further LEA-specific sub-classifications (e.g., Effective 1 and Effective 2). As shown in the table below, cut points are placed on the REIL Score continuum to identify the range of scores associated with each performance classification. For example, Coach A's REIL Score was a 377 which places him/her in the "Effective" range.

Table 7. Converting REIL Scores to Performance Classifications

REIL Score Range	Performance Classification
400 to 500	Highly Effective
300 to 399	Effective
200 to 299	Developing
100 to 199	Ineffective

Key Terms in the Guidebook

Coaching Observation Instrument (COI)

The instrument used to measure the quality of coaches' educator practice through field observations. The COI is made up of three rubrics: Enhancing Culture, Designing Support, and Implementing Professional Learning.

Conversion Charts

Charts that explain the criteria for translating results from the various COI and student growth measures to the original or new common 1 to 5 scales.

Galileo K-12 Categorical Growth Measure (CGA-G)

A criterion-referenced growth measure developed by Assessment Technology Incorporated (ATI). This measure tracks whether students, on average, underperformed, met, or outperformed their test score growth expectations based on their mastery of Arizona state content standards from the fall-to-spring administrations of the assessment.

Performance Score

The 1 to 5 score associated with the performance measures in the REIL-TNG Scorecard's five components: Total Points for each of the COI's three rubrics, Assigned Teacher Cadre Student Growth, and School Student Growth.

REIL Components

The 2014-15 REIL performance evaluation system's major categories of performance measures: Coaching Observation Instrument Results, Student Growth Results for the Assigned Teacher Cadre, and School Growth Results. When the COI Results component is disaggregated by rubric, the REIL Scorecard includes five specific components: Total Points for each of the COI's three rubrics, Student Growth Results for the Assigned Teacher Cadre, and School Growth Results.

REIL Points Earned

The total points earned, rounded to the nearest whole number, for each of the measures comprising the REIL Scorecard's five components.

REIL Score

The measure of educator effectiveness determined by combining a coach's performance on the five REIL Components. The REIL Score is then used to assign State Performance Classifications. The REIL Score will range from 100 to 500.

REIL-TNG Scorecard Weights

The proportion of the REIL Score that is based on each performance measure. Weights are applied to each performance measure before they are added together to create the REIL Score.

Standard Deviation

A measure of the extent to which the scores from an assessment vary from the mean score for that assessment. Standard deviations help determine the significance of differences between scores, whether they be students' test scores on a standardized assessment or educators' scores on an observational assessment.

State Performance Classifications

The four evaluation designations that districts must assign to Arizona coaches: Ineffective, Developing, Effective, and Highly Effective.

Total COI Points Earned

The total number of points that coaches earn by COI rubric across the elements that comprise each of those three rubrics.

MCESA

Maricopa County Education Service Agency

Rewarding Excellence in Instruction and Leadership

Practical Guidebook for Leaders:

Components of the 2014-2015 REIL Score

MCESA
Maricopa County Education Service Agency

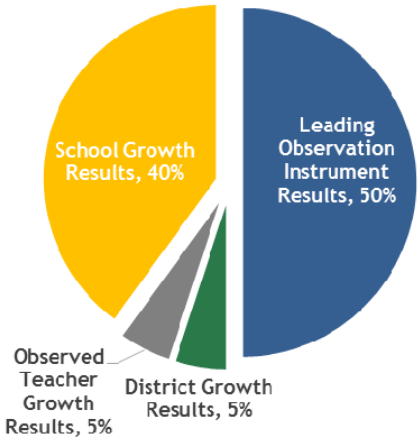
What is the Purpose of the Practical Guidebook?

The purpose of this **Practical Guidebook** is to provide you with information on how your REIL Score will be calculated for the 2014-15 school year. This guidebook answers the following questions:

- How will observation data and student growth estimates be converted into performance scores to inform your REIL Score?
- How will your final REIL Score be calculated based on the observation and student growth components?
- How will your final REIL Score be used to determine your performance classification?

As shown in Figure 1, the 2014-15 REIL performance-based evaluation system has three major components: Leading Observation Instrument results (50 percent), school growth results (40 percent), student growth results of observed teacher cadre (5 percent), and district growth results (5 percent).

Components of the REIL Performance Evaluation System



In general, as a building-level administrator, your evaluation results on each component are converted to a **Performance Score** on a 1 to 5 Scale. These performance scores are used to calculate a final REIL Score that is then used to assign a State Performance Classification to the building-level administrator.

Convert LdOI and Student Growth Measures

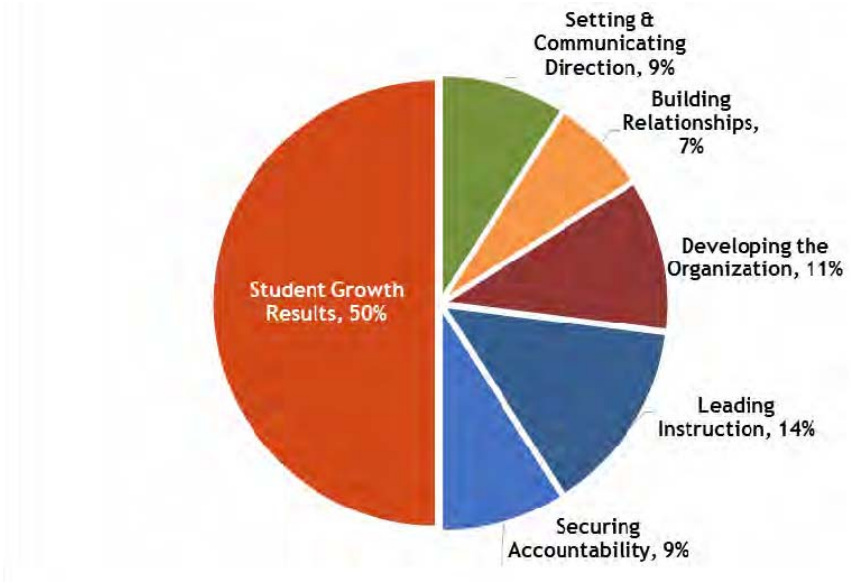
Leading Observation Instrument (LdOI)

The LdOI is composed of five rubrics:

1. **Setting & Communicating Direction**
2. **Building Relationships**
3. **Developing the Organization**
4. **Leading Instruction**
5. **Securing Accountability**

Across the five rubrics, a total of 22 unique elements are assessed and rated using a scale from 0 to 4. The majority of elements are rated on multiple occasions using evidence gathered through observations of your practice in different settings and through the review of documentation, including campus improvement plans, instructional support plans, educator goal plans, student achievement data, certified evaluator rating, management system artifacts and teacher/school observational data or artifacts. Over the school year, you will receive multiple ratings on the 22 elements within the LdOI's five rubrics. At the end of the school year, data from the individual element ratings will be combined to determine a summative performance score on each of the rubrics. As shown in Figure 2, these rubrics individually contribute between 7 percent and 14 percent to a leaders' REIL Score.

LdOI Observation Components of REIL Performance Evaluation System



Converting LdOI Rubric Results to Performance Scores

As previously noted, the individual element ratings for each LdOI rubric will be combined to determine a summative performance score for that rubric. This section details how performance scores are converted.

Step 1: For each element in the rubric, average all ratings received within the element, rounding to the tenth decimal. This produces one final rating for each of the rubric's elements. For example, let's take a look at Leader A's observation scores for the Setting & Communicating Direction rubric.

Rubric	Subject	Ratings				Average of Ratings by Element
Setting & Communicating Direction	Shared Purpose	2	3	3	4	3
	CIP: Goal Setting	3	3	3		3
	CIP: Action Plans	3				3
	School Resource Management	3	2	3	4	3

Step 2: The averaged element ratings are then combined to create one sum which determines the **Total LdOI Points Earned** for that rubric, again rounding to the tenth decimal. In this case, Leader A has earned 12 total points for the Setting & Communicating Direction rubric.

Rubric	Subject	Ratings				Average of Ratings by Element
Setting & Communicating Direction	Shared Purpose	2	3	3	4	3
	CIP: Goal Setting	3	3	3		3
	CIP: Action Plans	3				3
	School Resource Management	3	2	3	4	3
					Total LdOI Points Earned	12

Step 3: Use the conversion chart (see chart below) to convert the total points earned on each rubric to a performance score on the Common 1 to 5 Scale.

Conversion of Total Rubric Points to REIL-TNG Performance Scores

REIL Performance Score	Setting & Communicating Direction (4 Elements) 16 points possible	Building Relationships (3 Elements) 12 points possible	Developing the Organization (5 Elements) 20 points possible	Leading Instruction (6 Elements) 24 points possible	Securing Accountability (4 Elements) 16 points possible
5	14.9 to 16.0	11.2 to 12.0	18.6 to 20.0	22.3 to 24.0	14.9 to 16.0
4	12.4 to 14.8	9.3 to 11.1	15.5 to 18.5	18.6 to 22.2	12.4 to 14.8
3	10.4 to 12.3	7.9 to 9.2	13.0 to 15.4	15.6 to 18.5	10.4 to 12.3
2	6.8 to 10.3	5.1 to 7.8	8.5 to 12.9	10.2 to 15.5	6.8 to 10.3
1	0.0 to 6.7	0.0 to 5.0	0.0 to 8.4	0.0 to 10.1	0.0 to 6.7

Leader A received a performance score of 3 based on 12 Total Rubric Points earned for the Setting & Communicating Direction rubric. The same steps are used to calculate performance scores for the other rubrics. Below is Leader A's performance scores for each of the LdOI rubrics.

Rubric	Total LdOI Points Earned	Performance Score
Setting & Communicating Direction	12	3
Building Relationships	9.5	4
Developing the Organization	13.5	3
Leading Instruction	12.5	2
Securing Accountability	14	4

As previously discussed on page 2 with the **LdOI Observation Components of REIL Performance Evaluation System** pie graph, each of the above performance scores are weighted accordingly in the determination of the Leader's overall REIL Score.

Student Growth Measures

Multiple student growth models are utilized in order to measure observed teacher cadre, school, and district-level growth across a wide range of teaching assignments. The *Conceptual Guidebook* provides details about the Value-Added Model & Categorical Growth Analysis which are used in a leader's REIL Score. Basis Policy Research applies the statistical calculations to develop the growth estimates for each method. The following sections of this guidebook show how the growth estimates are converted into a performance score and the corresponding conversion charts. The calculations applied to your REIL Score are shown on the scorecard drilldowns in RDSS: Profile.

Observed Teacher Cadre Performance Score

The Observed Teacher Cadre Growth component of the REIL Score for leaders is broken out into its component measures-for example, Galileo Value-Added (VAM-G), Galileo Categorical Growth (CGA-G), and so on. The Composite Performance Score for each measure reflects the value that is entered on the REIL Scorecard.

*This table is a screen shot from RDSS: Profile of a leader's Observed Teacher Cadre Growth Component drill down displaying each of the contributing student growth models used by the different members of a leader's observed teacher cadre.

Each teacher contributing to a particular component measure is weighted equally. For example, when looking at Leader A's Custom Value-Added (VAM-C), there are five teacher's and each contributes 20% to the overall Composite Performance Score to give Leader A score of 2.5. In other words, the Composite Performance Score represents an average of each teacher's individual score.

Custom Value-Added (VAM-C)

Composite Performance Score Across Teachers: 2.50

All Subjects
5 Teachers

Teacher N	Weight	Composite Performance Score Across Subjects
Teacher 1	20.00%	3.00
Teacher 2	20.00%	1.50
Teacher 3	20.00%	1.50
Teacher 4	20.00%	3.00
Teacher 5	20.00%	3.50

*This table is a screen shot from RDSS: Profile of a leader's Observed Teacher Cadre Growth Component drilling into individual contributing teacher composite performance.

The leader's final Composite Performance Score is then calculated by applying the measure weights associated with each component measure. In Leader A's example is shown below.

Growth Measure	Composite Performance Score Across Teachers	Weights	Composite Performance Score
VAM-G	3.16	62.5%	(3.16 x .625) + (3.3 x .25) + (2.5 x .125) = **3.11**
CGA-G	3.30	25.0%	
VAM -C	2.50	12.5%	

*Please note that all numerical values displayed in RDSS: Profile drill downs are rounded to two decimal places. In certain instances, when rounded to two decimal places for display purposes only, the numerical values displayed for the weights will not sum to 100%.

School-level Growth

Due to there being multiple student growth models, there are likewise multiple student growth models that affect a leader's school-level growth. Just as the Student-level Growth component of the REIL Score is broken out into its component measures, so too is a leader's School-level Growth Component of the REIL Score. For example, Leader A's REIL Score, as shown below, is composed of Galileo Value-Added (VAM-G), Galileo Categorical Growth (CGA-G), Custom Value-Added (VAM-C) and Gold Value-Added (VAM-E). The Composite Performance Score for each measure reflects the value that is entered on the REIL Scorecard.

School Growth Component for Leader A Role: Building Level Administrator District: Elementary District School: Elementary School School Year: 2014-15 Scorecard ID: LR_03		40% of REIL Score
+ Galileo Value-Added (VAM-G)	Composite Performance Score Across Subjects:2.99	Measure Weight: 20.00%
+ Galileo Categorical Growth (CGA-G)	Composite Performance Score Across Subjects:3.31	Measure Weight: 10.00%
+ Custom Value-Added (VAM-C)	Composite Performance Score Across Subjects:2.88	Measure Weight: 5.00%
+ Gold Value-Added (VAM-E)	Composite Performance Score Across Development & Learning Areas: 3.00	Measure Weight: 5.00%

*This table is a screen shot from RDSS: Profile of a leader's School Student Growth Component drilling into the different component measures affecting the leader's REIL Score.

Each tested subject contributing to a particular component measure is weighted in proportion to the number of students tested. When looking at Leader A's Galileo Value-Added (VAM-G), there are four tested areas (Science, Writing, Math and Reading). For example, Science, with 300 student tested carries a weight of 17.41%, while Reading with 561 students tested carries a weight of 32.56%. Using these weights, the four subjects are combined to create the Composite Performance Score.

− Galileo Value-Added (VAM-G)	Composite Performance Score Across Subjects:2.99	Measure Weight: 20.00%
Science	Performance Score Across Grades: 2.50 Weight: 17.41%	Student N Across Grades: 300
Writing	Performance Score Across Grades: 2.50 Weight: 17.47%	Student N Across Grades: 301
Math	Performance Score Across Grades: 3.00 Weight: 32.56%	Student N Across Grades: 561
Reading	Performance Score Across Grades: 3.50 Weight: 32.56%	Student N Across Grades: 561

*This table is a screen shot from RDSS: Profile of a leader's School Student Growth Component drilling individual contributing assessments administered within each Student Growth Component.

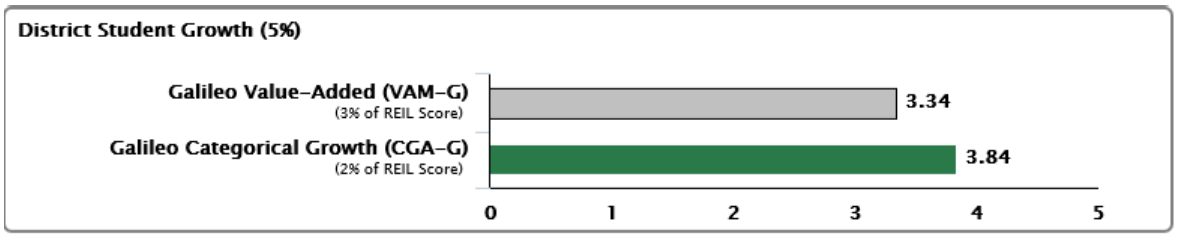
The leader's final Composite Performance Score is then calculated by applying the measure weights associated with each component measure. In Leader A's example is shown below the score is 2.99.

Subject	Composite Performance Score Across Grades	Weights	Composite Performance Score
Science	2.5	17.41%	(2.5 x .1741) + (2.5 x .1747) + (3 x .32.56) + (3.5 x .3256) = **2.99**
Writing	2.5	17.47%	
Math	3.0	32.56%	
Reading	3.5	32.56%	

*Please note that all numerical values displayed in RDSS: Profile drill downs are rounded to two decimal places. In certain instances, when rounded to two decimal places for display purposes only, the numerical values displayed for the weights will not sum to 100%.

District-level Growth

District-growth makes up 5% of a leader's REIL Score. When calculating district growth, the same process described previously as part of the School-wide Growth applies and is completed for all schools within the district. Each of the students who have assessment data associated to them become part of the leader's REIL Score.



*This is a screen shot from RDSS: Profile showing a leader's District Student Growth.

Calculating the REIL Score & Performance Classification

Scorecard Matrix

Within the REIL Score model, numerous scorecards are developed in order to represent the various teaching assignments across the REIL alliance. Shown below is the 2014-15 REIL scorecard matrix for leaders.

2014-2015 REIL Scorecards Group 4												
	LdOI Measures					School Growth				Observed Teacher Cadre Growth	District Growth	
REIL Scorecard Code	Setting & Communicating Direction	Building Relationships	Developing the Organization	Leading Instruction	Securing Accountability	VAM-G	CGA-G	VAM-C	VAM-E	Average of Observed Teachers' Individual Performance Scores	VAM-G	CGA-G
LR_01	9%	7%	11%	14%	9%	30%	10%			5%	3%	2%
LR_02	9%	7%	11%	14%	9%	25%	10%	5%		5%	3%	2%
LR_03	9%	7%	11%	14%	9%	20%	10%	5%	5%	5%	3%	2%
LR_04	9%	7%	11%	14%	9%				40%	5%	3%	2%
LR_06	12%	9%	14%	18%	12%	25%	10%					
LR_07	12%	9%	14%	18%	12%						25%	10%
LR_08	9%	7%	11%	14%	9%	25%	10%		5%	5%	3%	2%

*A larger version of the scorecard matrix is available is in the appendix.

The placement on a specific scorecard is driven by the observation and assessment data tied to a particular leader and observed teacher cadre. Going back to the example of Leader A, let's look at what data have been connected.

Measures		Performance Score
Observation	Setting & Communicating Direction	3
	Building Relationships	4
	Developing the Organization	2
	Leading Instruction	3
	Securing Accountability	4
Observed Teacher Cadre Growth	Average of Observed Teachers' Performance Scores	3.11
School-level Growth	VAM-G	2.99
	CGA-G	3.31
	VAM-C	2.88
	VAM-E	3
District-level Growth	VAM-G	3.34
	CGA-G	3.84

Based on the measures calculated, Leader A would be placed on scorecard **LR_03**. The observation, observed teacher cadre growth, school-level growth and district-level growth measures are inputted on the scorecard. Since each measure has a specific weight, the performance scores will be multiplied accordingly in order to get the total points. Leader A's REIL Score will now be calculated in order to demonstrate this final step.

Scorecard: **LR_03**		Performance Score (1-5)		Scorecard Weights		Points Earned	Possible Points
Observation Measures	Setting & Communicating Direction	3	x	9	=	27	45
	Building Relationships	4	x	7	=	28	35
	Developing the Organization	3	x	11	=	33	55
	Leading Instruction	2	x	14	=	28	70
	Securing Accountability	4	x	9	=	36	45
School-level Growth	VAM-G	2.99	x	20	=	60	100
	CGA-G	3.31	x	10	=	33	50
	VAM-C	2.88	x	5	=	14	25
	VAM-E	3	x	5	=	15	25
Observed Teacher Cadre Growth	Average of Observed Teachers' Performance Scores	3.11	x	5	=	16	25
District-level-Growth	VAM-C	3.34	x	3	=	10	15
	CGA-G	3.84	x	2	=	8	10
					REIL Score	**308**	**500**

***Points earned are rounded to the nearest whole number**

Determine Performance Classifications

The REIL Score also results in the generation of a performance classification. The state requires all classroom leaders to receive one of the four classifications: Highly Effective, Effective, Developing, or Ineffective. There may be further LEA-specific sub-classifications (e.g., Effective 1 and Effective 2). As shown in Table below, cut points are placed on the REIL Score continuum to identify the range of scores associated with each performance classification. For example, Leader A's REIL Score was a 308 which places his/her in the "Effective" range.

Table 7. Converting REIL Scores to Performance Classification

REIL Score Range	Performance Classification
400 to 500	Highly Effective
300 to 399	Effective
200 to 299	Developing
100 to 199	Ineffective

Key Terms in the Guidebook

Conversion Charts
Charts that explain the criteria for translating results from the various COI and student growth measures to the original or new common 1 to 5 scales.

Galileo K-12 Categorical Growth Measure (CGA-G)
A criterion-referenced growth measure developed by Assessment Technology Incorporated (ATI). This measure tracks whether students, on average, underperformed, met, or outperformed their test score growth expectations based on their mastery of Arizona state content standards from the fall-to-spring administrations of the assessment.

Leading Observation Instrument (LdOI)
The instrument used to measure the quality of leaders' educator practice through field observations and documentation. The LdOI is made up of five rubrics: Setting & Communicating Direction, Building Relationships, Developing the Organization, Leading Instruction and Securing Accountability.

Performance Score
The 1 to 5 score associated with the performance measures in the REIL-TNG Scorecard's five components: Total Points for each of the COI's three rubrics, Assigned Teacher Cadre Student Growth, and School Student Growth.

REIL Components
The 2014-15 REIL performance evaluation system's major categories of performance measures: Coaching Observation Instrument Results, Student Growth Results for the Assigned Teacher Cadre, and School Growth Results. When the COI Results component is disaggregated by rubric, the REIL Scorecard includes five specific components: Total Points for each of the COI's three rubrics, Student Growth Results for the Assigned Teacher Cadre, and School Growth Results.

REIL Points Earned
The total points earned, rounded to the nearest whole number, for each of the measures comprising the REIL Scorecard's five components.

REIL Score
The measure of educator effectiveness determined by combining a coach's performance on the five REIL Components. The REIL Score is then used to assign State Performance Classifications. The REIL Score will range from 100 to 500.

REIL-TNG Scorecard Weights

The proportion of the REIL Score that is based on each performance measure. Weights are applied to each performance measure before they are added together to create the REIL Score.

Standard Deviation

A measure of the extent to which the scores from an assessment vary from the mean score for that assessment. Standard deviations help determine the significance of differences between scores, whether they be students' test scores on a standardized assessment or educators' scores on an observational assessment.

State Performance Classifications

The four evaluation designations that districts must assign to Arizona coaches: Ineffective, Developing, Effective, and Highly Effective.

Total COI Points Earned

The total number of points that coaches earn by COI rubric across the elements that comprise each of those three rubrics.

Appendix

Scorecard Matrix

2014-2015 REIL Scorecards Group 4												
	LdOI Measures					School Growth				Observed Teacher Cadre Growth	District Growth	
REIL Scorecard Code	Setting & Communicating Direction	Building Relationships	Developing the Organization	Leading Instruction	Securing Accountability	VAM-G	CGA-G	VAM-C	VAM-E	Average of Observed Teachers' Individual Performance Scores	VAM-G	CGA-G
LR_01	9%	7%	11%	14%	9%	30%	10%			5%	3%	2%
LR_02	9%	7%	11%	14%	9%	25%	10%	5%		5%	3%	2%
LR_03	9%	7%	11%	14%	9%	20%	10%	5%	5%	5%	3%	2%
LR_04	9%	7%	11%	14%	9%				40%	5%	3%	2%
LR_06	12%	9%	14%	18%	12%	25%	10%					
LR_07	12%	9%	14%	18%	12%						25%	10%
LR_08	9%	7%	11%	14%	9%	25%	10%		5%	5%	3%	2%

Student Growth Measures Conversion Charts

Method to Evaluate Student Growth	Growth Measures	Benchmark Population	1	1.5	2	2.5	3	3.5	4	4.5	
Value-Added	VAM-G,C,E*	REIL/REIL-TNG	below -1.75	-1.75 to -1.26	-1.25 to -.76	-.75 to .26	-.25 to +.25	+.26 to +.75	+.76 to +1.25	+1.26 to +1.75	

* Galileo, Custom, and GOLD

Method to Evaluate Student Growth	Growth Measures	Benchmark Population	Performance Scores								
			1	1.5	2	2.5	3	3.5	4	4.5	5
Value-Added	VAM-Z,M*	AZ	below -1.75	-1.75 to -1.26	-1.25 to -.76	-.75 to -.26	-.25 to +.25	+.26 to +.75	+.76 to +1.25	+1.26 to +1.75	above +1.75

* AzMERIT & MSAA (NCSC)

Method to Evaluate Student Growth	Assessment	Growth Measure	Benchmark Population					
				1	2	3	4	
Categorical Growth	Galileo	CGA-G	REIL/REIL-TNG	1.0 - 1.4	1.5 - 1.7	1.8 - 2.2	2.3 - 2.5	

Method to Evaluate Student Growth	Growth Measures	Benchmark Population	Performance Scores								
			1	1.5	2	2.5	3	3.5	4	4.5	5
Value-Added	MET-G,C,E*	REIL/REIL-TNG	below -1.75	-1.75 to -1.26	-1.25 to -.76	-.75 to .26	-.25 to +.25	+.26 to +.75	+.76 to +1.25	+1.26 to +1.75	above +1.75

* Galileo, Custom, and GOLD

Method to Evaluate Student Growth	Growth Measures	Benchmark Population									
			1	1.5	2	2.5	3	3.5	4	4.5	5
Value-Added	MET-Z,M*	AZ	below -1.75	-1.75 to -1.26	-1.25 to -.76	-.75 to -.26	-.25 to +.25	+.26 to +.75	+.76 to +1.25	+1.26 to +1.75	above +1.75

* AzMERIT & MSAA (NCSC)

MCESA
Maricopa County Education Service Agency

Sustainability Plans

Phase-in / Phase-out Approach for Sustainability – Kingman USD			
	Existing LEA Resources	LEA Efficiencies	TIF Grant Resources
2016-2017	M&O – No Change CSF Fund 11 – No Change CSF Fund 12 – No Change CSF Fund 13 – No Change 123 Funds - Added to M&O to support future PBCS		
2017-2018	M&O – No Change CSF Fund 11 - No Change CSF Fund 12 - No Change CSF Fund 13 – Partial Carry Over 123 Funds - Added to M&O to support future PBCS		
2018-2019	M&O – Supporting PBCS CSF Fund 11 – No Change CSF Fund 12 - Carry Over CSF Fund 13 - Carry Over 123 Funds - Added to M&O to 100% support PBCS	• Aligned PD • Strategic assignment of most effective educators • Cost savings realized from educator retirements • Dismissal of chronically ineffective educators • Cost savings realized from redesigned job roles	TIF Supplement PBCS (TIF5)
2019-2020	M&O - 100% PBCS CSF Fund 11 - 100% Aligned to Educator Evaluation System CSF Fund 12 -100% PBCS CSF Fund 13 - 100% PBCS 123 Funds - Added to M&O to 100% support PBCS	• Aligned PD • Strategic assignment of most effective educators • Cost savings realized from educator retirements • Dismissal of chronically ineffective educators • Cost savings realized from redesigned job roles	TIF Supplement PBCS (TIF5)
2020-2021	M&O - 100% PBCS CSF Fund 11 - 100% Aligned to Educator Evaluation System CSF Fund 12 -100% PBCS CSF Fund 13 - 100% PBCS 123 Funds - Added to M&O to 100% support PBCS	• Aligned PD • Strategic assignment of most effective educators • Cost savings realized from educator retirements • Dismissal of chronically ineffective educators • Cost savings realized from redesigned job roles	TIF Supplement PBCS (TIF5)
2021-2022	M&O - 100% PBCS CSF Fund 11 - 100% Aligned to Educator Evaluation System CSF Fund 12 -100% PBCS CSF Fund 13 - 100% PBCS 123 Funds - Added to M&O to 100% support PBCS	• Aligned PD • Strategic assignment of most effective educators • Cost savings realized from educator retirements • Dismissal of chronically ineffective educators • Cost savings realized from redesigned job roles	0%

Sustainability Plans

Phase-in / Phase-out Approach for Sustainability – TIF4 LEAs			
	Existing LEA Resources	**LEA Efficiencies**	**TIF Grant Resources**
2012-2013	M&O - No Change CSF - No Change		No PBCS
2013-2014	M&O - No Change CSF Fund 11 - No Change CSF Fund 12 - Carry Over CSF Fund 13 - No Change		No PBCS
2014-2015	M&O - Supporting New PBCS CSF Fund 11 - Aligned to Educator Evaluation System CSF Fund 12 - Carry Over CSF Fund 13 - Carry Over	• Aligned PD	100% TIF Supplement PBCS (TIF4)
2015-2016	M&O - Supporting PBCS CSF Fund 11 - Aligned to Educator Evaluation System CSF Fund 12 - Carry Over CSF Fund 13 - Carry Over 123 Funds - Added to M&O to support PBCS	• Aligned PD • Strategic assignment of most effective educators	100% TIF Supplement PBCS (TIF4)
2016-2017	M&O - Supporting PBCS CSF Fund 11 - Aligned to Educator Evaluation System CSF Fund 12 - Carry Over CSF Fund 13 - Carry Over 123 Funds - Added to M&O to 100% support PBCS	• Aligned PD • Strategic assignment of most effective educators • Cost savings realized from educator retirements • Dismissal of chronically ineffective educators	100% TIF Supplement PBCS (TIF4)
2017-2018	M&O - 100% PBCS CSF Fund 11 - 100% Aligned to Educator Evaluation System CSF Fund 12 -100% PBCS CSF Fund 13 - 100% PBCS 123 Funds - Added to M&O to 100% support PBCS	• Aligned PD • Strategic assignment of most effective educators • Cost savings realized from educator retirements • Dismissal of chronically ineffective educators • Cost savings realized from redesigned job roles	TIF Supplement PBCS (TIF5)
2018-2019	M&O - 100% PBCS CSF Fund 11 - 100% Aligned to Educator Evaluation System CSF Fund 12 -100% PBCS CSF Fund 13 - 100% PBCS 123 Funds - Added to M&O to 100% support PBCS	• Aligned PD • Strategic assignment of most effective educators • Cost savings realized from educator retirements • Dismissal of chronically ineffective educators • Cost savings realized from redesigned job roles	TIF Supplement PBCS (TIF5)
2019-2020	M&O - 100% PBCS CSF Fund 11 - 100% Aligned to Educator Evaluation System CSF Fund 12 -100% PBCS CSF Fund 13 - 100% PBCS	• Aligned PD • Strategic assignment of most effective educators • Cost savings realized from educator retirements	TIF Supplement PBCS (TIF5)

Phase-in / Phase-out Approach for Sustainability – Nadaburg USD			
	Existing LEA Resources	LEA Efficiencies	TIF Grant Resources
2012-2013	M&O - No Change CSF Fund 11 – Carry Over CSF Fund 12 - Carry Over CSF Fund 13 – Carry Over	• Aligned PD • Strategic assignment of most effective educators	TIF Supplement PBCS (TIF3)
2013-2014	M&O - No Change CSF Fund 11 – Carry Over CSF Fund 12 - Carry Over CSF Fund 13 – Carry Over	• Aligned PD • Strategic assignment of most effective educators	TIF Supplement PBCS (TIF3)
2014-2015	M&O - No Change CSF Fund 11 – Carry Over CSF Fund 12 - Carry Over CSF Fund 13 – Carry Over	• Aligned PD • Strategic assignment of most effective educators • Cost savings realized from educator retirements • Dismissal of chronically ineffective educators	TIF Supplement PBCS (TIF3)
2015-2016	M&O - Supporting PBCS CSF Fund 11 - 100% PBCS CSF Fund 12 - 100% PBCS CSF Fund 13 - 100% PBCS 123 Funds - Added to M&O to support PBCS	• Aligned PD • Strategic assignment of most effective educators • Cost savings realized from educator retirements • Dismissal of chronically ineffective educators	TIF Supplement PBCS (TIF3 No-cost Extension)
2016-2017	M&O - Supporting PBCS CSF Fund 11 - 100% PBCS CSF Fund 12 - 100% PBCS CSF Fund 13 - 100% PBCS 123 Funds - Added to M&O to 100% support PBCS	• Aligned PD • Strategic assignment of most effective educators • Cost savings realized from educator retirements • Dismissal of chronically ineffective educators	TIF Supplement PBCS (TIF5)
2017-2018	M&O - Supporting PBCS CSF Fund 11 - 100% PBCS CSF Fund 12 - 100% PBCS CSF Fund 13 - 100% PBCS 123 Funds - Added to M&O to 100% support PBCS	• Aligned PD • Strategic assignment of most effective educators • Cost savings realized from educator retirements • Dismissal of chronically ineffective educators • Cost savings realized from redesigned job roles	TIF Supplement PBCS (TIF5)
2018-2019	M&O - Supporting PBCS CSF Fund 11 - 100% PBCS CSF Fund 12 - 100% PBCS CSF Fund 13 - 100% PBCS 123 Funds - Added to M&O to 100% support PBCS	• Aligned PD • Strategic assignment of most effective educators • Cost savings realized from educator retirements • Dismissal of chronically ineffective educators • Cost savings realized from redesigned job roles	TIF Supplement PBCS (TIF5)

2019-2020	M&O - Supporting PBCS CSF Fund 11 - 100% PBCS CSF Fund 12 - 100% PBCS CSF Fund 13 - 100% PBCS 123 Funds - Added to M&O to 100% support PBCS	• Aligned PD • Strategic assignment of most effective educators • Cost savings realized from educator retirements • Dismissal of chronically ineffective educators • Cost savings realized from redesigned job roles	TIF Supplement PBCS (TIF5)
2020-2021	M&O - Supporting PBCS CSF Fund 11 - 100% PBCS CSF Fund 12 - 100% PBCS CSF Fund 13 - 100% PBCS 123 Funds - Added to M&O to 100% support PBCS	• Aligned PD • Strategic assignment of most effective educators • Cost savings realized from educator retirements • Dismissal of chronically ineffective educators • Cost savings realized from redesigned job roles	TIF Supplement PBCS (TIF5)
2021-2022	M&O - Supporting PBCS CSF Fund 11 - 100% PBCS CSF Fund 12 - 100% PBCS CSF Fund 13 - 100% PBCS 123 Funds - Added to M&O to 100% support PBCS	• Aligned PD • Strategic assignment of most effective educators • Cost savings realized from educator retirements • Dismissal of chronically ineffective educators • Cost savings realized from redesigned job roles	0%

Evaluation Plan

Evaluation Plan Matrix

GOAL 1: Attract, place, retain, and sustain effective educators through implementation of a high-quality, LEA-wide human capital management system focused on expanding leadership and cultivating an engaged workforce.		
Objectives	**Data Collection /Sources**	**Analytic Strategies**
1.1: REIL-Extend LEAs will implement high-quality human capital management strategies in alignment with the common vision of instructional improvement.	• Semi-structured interviews with principals and central office staff • Annual surveys of educators • LEA employment data (e.g., retention rates, attrition) • Human resource document review • Data from HCMS Self-Assessment and HRA IC Map • RDSS reports • LEA administrative employment data; REIL Scores • LEA financial data / salary schedules	• Qualitative analyses of interview data • Descriptive quantitative analyses of survey data • Cross-sectional and longitudinal descriptive analyses of HCMS Self-Assessment & HRA IC Map • Descriptive quantitative analyses of employment and financial data, salary schedule data, and REIL Scores • Correlational analyses of educator evaluation measures with educator value-added scores
Objectives	**Data Collection /Sources**	**Analytic Strategies**
1.2: REIL-Extend LEAs will implement an LEA-wide performance-based educator evaluation and support system that successfully differentiates performance in order to implement personalized support and feedback for improvement.	• Site visits with semi-structured interviews with principals and central office staff • Annual survey of educators • REIL Score / evaluation data • Data from HCMS Self-Assessment and HRA IC Map • Observation scores on power indicators and early warning system indicators • REIL Score distributions • Educator retention data • Educator Goal Plan data • Co-observation / Inter-rater agreement data • Micro-credentialing data	• Qualitative analyses of interview data • Cross-sectional and longitudinal quantitative analyses of survey data • Correlational analyses of EGP progress and teacher observation-based outcomes • Cross-sectional and longitudinal descriptive analyses of REIL Score distributions and scoring drift • Correlational analyses of educator observation and student growth-based measures (e.g., teacher value-added scores) • Cross-sectional and longitudinal descriptive analyses of HCMS Self-Assessment & HRA IC Map • Exploratory and confirmatory factor analyses of HCMS and HRA IC Map to optimally align scales to performance outcomes • Exploratory and confirmatory factor analyses of educator evaluation models to optimally align performance scores to evaluation measures Descriptive and correlation analyses of user access of RDSS including teacher access patterns and observation and student growth-based outcomes
Objectives	**Data Collection /Sources**	**Analytic Strategies**

1.3: REIL-Extend LEAs will increase the retention rate by expanding leadership opportunities through implementation of a career pathway program.	• Site visits with semi-structured interviews with principals and central office staff • Annual survey of educators including an exit section • HCMS Self-Assessment and HRA IC Map data • Educator recruitment and retention data • HR and Principal Supervisor certification data • *Reach extension* data including list of Opportunity Culture (Spotlight) Schools; list of *reach extension* models by school; list of reach extension teachers	• Qualitative analyses of interview data • Quantitative analyses of educator recruitment, retention, and attrition patterns and their relationship to survey and evaluation results, and career pathway program participation • Single and multivariate Receiver Operator Curve (ROC) analyses on predictors of educator exits to identify early warning indicators
Objectives	**Data Collection /Sources**	**Analytic Strategies**
1.4: REIL-Extend LEAs will implement differential compensation based on educator effectiveness and aligned to the common vision of instructional improvement	• Semi-structured interviews with LEA and MCESA leadership and staff • Annual surveys of educators • LEA finance and Human Resource (HR) data (e.g., personnel and salary schedule data) • HCMS Self-Assessment and HRA IC Map data • REILize Decision Support System (RDSS) reports • Educator REIL Scores (inclusive of observation and student growth-based outcomes) • An annual survey of educators • District administrative employment data; REIL Scores • Data from HCMS Self-Assessment and HRA IC Map • Educator retention data	• Qualitative analyses of interview data • Cross sectional and longitudinal descriptive analyses of educator compensation • Survey-based analyses on the alignment of educator perceptions of instruction improvement and differential compensation • Correlational analyses of HCMS, HRA IC Map, Educator Surveys, Educator Performance Scores, and Student Growth Measures
Objectives	**Data Collection /Sources**	**Analytic Strategies**
1.5: REIL-Extend LEAs will ensure that at least 33% of the 40% Classroom Site Fund (301) allocation for individual teacher performance is based on the REIL score overall effectiveness rating.	• LEA 301 Plans • LEA finance and Human Resource (HR) data (e.g., personnel and salary schedule data) • Semi-structured interviews with LEA leadership and staff	• Qualitative exploration of interview transcripts from district human resources/finance staff interviews • Cross-sectional and longitudinal descriptive analyses of HCMS Self-Assessment & HRA IC Map

GOAL 2: Redesign high-need schools to accelerate access to effective educators by extending the reach of excellent teachers.		
Objectives	**Data Collection /Sources**	**Analytic Strategies**
2.1: REIL-Extend LEAs will increase the percentage of students having access to effective and highly effective educators in core content areas.	• LEA finance and Human Resource (HR) data (e.g., personnel and salary schedule data) • HCMS Self-Assessment and HRA IC Map data • REILize Decision Support System (RDSS) reports • Educator REIL Scores (inclusive of observation and student growth-based outcomes) • Semi-structured interviews with LEA and MCESA leadership and staff • AzMERIT student-level assessment results (inclusive of proficiency levels) • *Reach extension* data	• Quantitative (correlational and predictive) analyses of educator mobility patterns and their relationship to educator, school, and implementation performance • Qualitative analyses of interviews with administrators and HR staff • Cross sectional and longitudinal descriptive analyses of student performance on the state-administered AzMERIT assessment

Communication and Stakeholders Groups

Communication and Stakeholder Groups

Group	Who They Are	What They Do
MCESA PROGRAM LEADS		
(1) Program Management Team	Project Directors; Field Specialists; Project Leads and supporting staff.	Manage all aspects of the program, and oversee the implementation of the Management Plan.
(2) Field Specialists	On-site Program Coordinator assigned to each *REIL-Extend LEA*.	Serve as the main communication conduit between REIL-Extend management team and district teams; facilitate professional development; support program activity implementation.
SPOTLIGHT SCHOOL DESIGN TEAMS		
(3) MCESA Opportunity Culture Design Team	Designated Project Lead; Project Directors; Field Specialist representatives.	Manage implementation of Opportunity Culture initiative.
(4) Cross- LEA Opportunity Culture Design Team	Project Directors; Field Specialists; MCESA Opportunity Culture Project Lead; LEA implementation leads at Spotlight Schools.	Maintain focus on the Opportunity Culture initiative's principles and the ultimate goal of reaching all students with excellent teaching; build capacity for ongoing implementation.
(5) LEA-Level Opportunity Culture Design Teams	LEA-level design team comprised of teachers, principals, LEA staff, Public Impact personnel.	Make LEA-level design decisions and oversee implementation of school-level reach extension models; ensures that school-level design teams, which must include teachers, have clear parameters for school-level decisions and are given some autonomy to make implementation decisions.
(6) Opportunity Culture School-Level Design Teams	Representative teams comprised of teachers and school leaders.	Choose and tailor school-level reach extension models; to reach more students with excellent teachers and their teams.
CROSS – LEA DESIGN TEAMS		
(7)Superintendent Team	MCESA Management Team; LEA Superintendents.	Grapple with and exchange information related to identifying and removing obstacles, solving challenges; navigate state policy; identification of strategies for supporting Governing Boards.
(8) Implementation Leads Team	MCESA Management Team, LEA-level personnel representing HCMS/PBCS, PBE, data management & assessment; finance stakeholders.	Ensure implementation of REIL-Extend Management Plan activities; advise and inform on program.
(9) Data Management System/ Professional Development Teams	MCESA Management Team, rotating LEA-level personnel based on agenda.	Inform RDSS development and implementation with a focus on implementation of the Learning Management System components that support personalized professional learning for educators.

Communication and Stakeholder Groups

Group	Who They Are	What They Do
(10) Special Session Teams	MCESA management team members, LEA-level personnel representing HCMS/PBCS, PBE, data management & assessment; finance stakeholders.	Advise and inform on specific program activities on an as needed basis; receive and report communication.
LEA LEVEL DESIGN TEAMS		
(11) LEA Leadership & Communication Teams	Superintendent's cabinet and *REIL-Extend* Field Specialists.	Ensure compliance with the established MOU; work to align district initiatives with REIL-Extend program goals; review agendas and outcomes from cross-district teams and transition teams; lead year-to-year planning and implementation efforts.
(12) LEA-Wide Design/ Transition Teams	LEA-Level topical stakeholder group(s); field specialists.	Advise and inform on specific program activities on an as needed basis; receive and report communication.
(13) School-Level Design Teams	All applicable school staff.	Use the Human Centered Design process to design solutions for complex challenges at the school and classroom level.
PROGRAM ADVISORY COUNCIL		
(14) Advisory Council	Representation from Management Team; Superintendents & Leads; Partners.	Share views, ideas, challenges, and opinions in order to facilitate consistent implementation of the REIL-Extend program; advise on communication from learnings in the field and dissemination strategies.

Additional Resumes and Job Descriptions

[redacted]

PROFILE

- More than nine years of experience in government finance including budget, compliance and audit.
- Highly adept in the use of analytical software and financial accounting systems (e.g. Excel, Crystal Reports, Visual Basic) to perform statistical analyses, develop useful financial reports, and streamline business processes.
- Extensive analytical skills including modeling, forecasting, statistical analysis, and regression analysis.
- Strong interpersonal, organizational, communication, writing and presentation skills.
- Knowledgeable of and proficient at researching and interpreting regulations, guidance, and statute including the Code of Federal Regulations (CFR), the US Code, the Arizona Revised Statutes, the Uniform System of Financial Records (USFR), and the OMB Circulars in order to ensure program compliance and appropriate internal controls.
- More than five cumulative years of supervisory experience including supervisory experience in a government setting and supervisory experience in a volunteer not-for-profit setting.

PROFESSIONAL EXPERIENCE

Administrator for Fiscal Compliance and Innovation February 2016 – Present
Maricopa County Education Service Agency (MCESA) Phoenix, AZ

- Ensure that all of the Agency's financial activities are aligned to the Agency's goals and objectives and that they meet the intent of Arizona statute, county policies, and federal grant requirements.
- Meet with the Agency's divisional executives regularly to review and monitor financial status reports and budgets and to ensure senior leadership are informed of the Agency's financial status.
- Oversee the Agency's billing, grant reimbursement requests, and other cash receipts to ensure effective cash management.
- Monitor the fiscal activities of Maricopa County school districts to ensure they appropriately account for federal and state funds.
- Develop and monitor the Agency's $31 million budget through utilization of the county's budget, financial, and human resource systems.

Itinerant Business Manager July 2014 – February 2016
Maricopa County Education Service Agency (MCESA) Phoenix, AZ

- Developed and implemented an automated strategy to monitor and report on the Agency's monthly budget balances, special revenue fund balances, and projected indirect cost claims in order to ensure program compliance and appropriate internal controls.
- Developed the Agency's $31 million budget through utilization of the county's budget, financial, and human resource systems.
- Met with each of the Agency's divisional executives to gather cost requirements and other information related to current procedure and practice in order to compile appropriate budget data in preparation for the Agency's zero based budget protocol and in support of the county's strategic plan.
- Analyzed and recommended changes to the cost sharing model for the Agency's county-wide school district accounting system to ensure that it is both sustainable and equitable to each of the consortium members (i.e. participating school districts).

Finance Business Analyst October 2012 – July 2014
Maricopa County Education Service Agency (MCESA) Phoenix, AZ

- Developed and monitored the implementation of fiscal policies and procedures for the Agency's multi-million dollar grant programs including the handling of cost allocations, time and effort reporting, cash management, and the maintenance of matching expenditures source documentation to ensure compliance with state and federal regulations.

- Met at least monthly with the Agency's grant project directors to provide budget status reports and to plan strategically for the effective and efficient use of the Agency's grant monies.
- Utilized previous compliance monitoring experience and expertise to identify potential compliance risks for the Agency and to provide assistance to the Agency in preparation for and during federal compliance monitoring site-visits and during Arizona Office of the Auditor General audits.
- Drafted grant budgets and budget narratives and assist in the development of grant applications and proposals as a member of the Agency's grant writing team.

Education Program Specialist – Budget and Compliance October 2008 – October 2012
Arizona Department of Education, K-12 Literacy and School Improvement and Intervention Phoenix, AZ

- Developed and monitored the budget for federal school improvement administrative and assistance monies to ensure that the $100 million in federal school improvement monies would be expended, allocated, and distributed in a timely and efficient manner.
- Directed the activities of the School Improvement Budget and Compliance Team (2 staff members) including the review of subgrantee budget applications and amendments, single audit follow-up procedures, coordination of compliance monitoring visits, and the drafting of compliance monitoring reports.
- Performed ongoing subrecipient monitoring of subgrantee school district and charter schools including coordinating compliance monitoring site visits, issuing compliance monitoring reports and corrective action plans, and completed follow up procedures for subgrantees who had received single audit findings.
- Evaluated subgrant budget applications, budget amendments, cash management reports and completion reports as submitted by school districts and charter schools in the Arizona Department of Education's Grants Management Enterprise system to ensure the appropriate use and timely draw-down of subgrant monies.
- Developed relationships with and provided formal and informal trainings to district and charter school staff to assist them in maintaining substantial compliance with state and federal regulations.
- Provided regular trainings to programmatic staff in the School Improvement and Intervention Team on such topics as time and effort reporting, supplement-not-supplant requirements and appropriate use of funds, so that they could provide accurate and relevant information to district and charter school staff.

Auditor July 2007 – October 2008
Arizona Department of Education, The Audit Unit Phoenix, AZ

- Conducted attendance audits of school districts and charter schools to ensure they received the proper amount of state funding based on reported attendance figures and the state equalization payment formula as defined by Arizona statute.
- Drafted and provided quality control for audit reports which included audit finding, summaries of any deficiencies in internal controls and recommendations that addressed the deficiencies.
- Gained knowledge of state and federal requirements and regulations related to school finance including the O.M.B. Circular A-133 Compliance Supplement, the Code of Federal Regulations (CFR), the Arizona Department of Education Business Rules, Arizona Revised Statute, and the Uniform System of Financial Records (USFR).

EDUCATION

Master of Public Policy, Emphasis in Public Finance, *Brigham Young University,* 2007
BA, Economics, Minors in Mathematics and Business Management, *Brigham Young University,* 2005

OTHER SKILLS AND EXPERIENCE

- Member of the Arizona Association of School Business Officials (AASBO).
- Completion of the AASBO School Business Management Training.
- Member of the Arizona Management Society.
- Speak and write Spanish fluently.

Laura Harnish, Ed. D.

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Education

University of Phoenix, Phoenix, AZ

- Administrative Certificate – Principal, 2004-2005

Northern Arizona University, Flagstaff, AZ

- Ed. D. - Curriculum and Instruction with focus on teacher preparation and math education, 1998-2000
- Dissertation title: A Comparison of Pre-service and In-service Teachers Knowledge and Beliefs of Mathematics Standards
- M. Ed. - Gifted Education, 1994-1996

Michigan State University, East Lansing, MI

- B.A. – Elementary Education, 1987-1991

Professional Experience

Maricopa County Education Service Agency, Phoenix, AZ 2012-present

Administrator for Assessment

- Supervise and coordinate development, delivery, and data use of assessments for teachers of non-tested areas (art, music, PE, social studies, CTE)
- Provide professional development in data and assessment literacy and use
- Consult and co-create with school districts on curriculum and assessment processes
- Consult on project team building data management system for Arizona Dept. of Education
- Recipient of "Art Advocate" Award, Arizona Art Education Association, 2015

Madison Elementary School District, Phoenix, AZ 2000-2011

Instructional Coach & Student Achievement Specialist

- Implemented district initiatives by planning and facilitating small group professional development meetings, full faculty trainings or district-wide workshops
- Topics of expertise include lesson planning, instructional skills, mentoring, Professional Learning Communities, data driven instruction, Response To Intervention , math and literacy content and best practices, assessment, and gifted education
- Mentored new and veteran K-4 teachers in planning and teaching lessons
- Supported principal with administrative duties such as scheduling, hiring, resource management, assessment management, data collection, analysis and reporting
- Supervised writing of district math, reading and writing curriculum maps and assessments 2003-2010
- Served as Milken Master Teacher in the Teacher Advancement Program, 2001-2004
- Evaluated teacher performance of instruction through classroom observations, 2002-2004
- Accumulated 400+ hours of mathematics, literacy and leadership training

Northern Arizona University, Flagstaff, AZ 1998-1999

Instructor

- Taught ECI 321: Elementary School Curriculum to elementary education majors
- Coordinated and supervised student practicum work
- Served as intern in Professional Development School, evaluating pre-service teachers and assisting with administrative duties

Related Experience

Summer Institutes

Instructor

- LAUSD/LUCI – 5 day institute for elementary teachers in Los Angeles, CA on mathematics content and instruction, July 2000, 2001
- Madison School District Summer Math Institute – 4 day institute for new teachers on mathematics content and instruction, July 2001
- Madison School District Literacy Institute – 2 day institute for new teachers on literacy instruction, July, 2006 and 2007
- Madison School District – Gifted Provisional Endorsement, designed and taught 40 hour course, May-June 2009

Outreach to the Educational Community

Committee Memberships and Consulting

- Catalina Foothills School District – Facilitate professional development workshops for K-5 teachers in math instruction, Common Core and assessment 2011-present
- Arizona State University – Member of Feedback Committee, charged with providing feedback to course review teams for the redevelopment of iTeachAZ teacher preparation program, 2011
- Arizona State University – Reviewer for the development of Content Academy coursework, 2006-2007
- Arizona Mathematics Education Panel of Experts - Statewide think tank group charged with drafting a report addressing the role of higher education in helping teachers have a positive impact on the performance of underserved/underrepresented students on standards-based assessments for the Arizona Board of Regents, 2000-2001
- Arizona Association for the Gifted and Talented – Board member, Editor-in-Chief - *Maximizing Potential: A Guidebook on Gifted Education in Arizona,* Chair of the Scholarship Committee*,* 1994-1996

Conference Presentations

- "Standards Based Math Centers for the Primary Grades" - Phoenix Union High School District; Science, Math and Technology Conference; April 1, 2002
- "Under the Microscope: Supporting Teachers in the Classroom" - National Council of Supervisors of Mathematics, 34th Annual Conference; April 20, 2002
- "Teacher Leader Panel Discussion" – Third Virtual Conference on Sustainability of Systemic Change; May 13-21, 2003
- "TAP Master and Mentor Teachers" – Milken Family Foundation Teacher Advancement Program Second Annual Conference; November 22-25, 2004
- "Plans That Grow With the Writer" – The Learning Network Tenth Annual Conference; June 28-29, 2004
- "Teacher Perspectives" - Renewing our Schools, Securing our Future: A National Task Force on Public Education; November 19, 2004
- "Implementing RTI: A School Perspective" – International Dyslexia Association 61st Annual Conference; October 28, 2010
- "Assessment Development" – Arizona Association for Health, Physical Education, Recreation and Dance 81st Annual Conference; October 24-26, 2012
- "Drowning in Data: Strategies for Success" – Arizona Department of Education Mega Conference; November 17-19, 2015

Darcy Moody

[redacted]

CAREER PROFILE

Accomplished educator and experienced staff developer with proven abilities in leadership and the development and implementation of educational programming.

PROFESSIONAL EXPERIENCE

STEM Administrator
Maricopa County Education Service Agency 2016-present

REIL Project Director
Maricopa County Education Service Agency 2013-2016

REIL Cross-District Field Specialist
Maricopa County Education Service Agency 2011-2013

Director of STEM
Maricopa County Education Service Agency 2010-2011

Staff Development Manager
Teacher Development Group 2008-2010

Science Curriculum Manager
Salt River Pima- Maricopa Indian Community School District 2007-2008

Workshop Manager
Delta Education, State-Wide, 2005-2007

Faculty Associative Instructor
Arizona State University West, Phoenix, AZ 2005-2011

Elementary Classroom Teacher Leader
Madison School District, Phoenix, AZ 2001-2005

Elementary Classroom Teacher
C.A.S.Y. Elementary School, Phoenix, AZ 1996- 2001

CORE COMPETENCIES

Leadership and Professional Development

- TAP Facilitator- Designed, coordinated and facilitated training and support of under graduate and graduate level instructors for the iTeach program, Mary Lou Fulton Teachers College.
- Hope Street Group Policy Volunteers Team Leader- Set goals, distributed tasks, facilitated

discussion, and wrote policy recommendations for Teacher Evaluations Systems project.

- FOSS Facilitator Professional Development Program Design Team- Designed and facilitated ongoing training of a statewide cohort of facilitators focused on providing professional development at a school and district level for teachers and administrators.
- Building Unity in Leadership Teams (BUILT) Project member- Developed innovative configuration maps for mathematics and science based on current research and data collected district wide.
- Site Based Math Leadership Team- Increased teachers' skills in math content knowledge, lesson implementation, student engagement and classroom discourse, through staff development trainings, demonstration teaching and reflective dialogue.

Professional Affiliations and Contributions

- Professional Learning Community, Lawrence Hall of Science at UC Berkeley
- National Science Teachers Association
- National Council of Teachers of Mathematics
- Association for Supervision and Curriculum Development
- Hope Street Group Policy 2.0 Community Leader
- Stand for Children Campaign Steering Committee
- Stand for Children Education Reform Committee
- Site Based Management Team representative
- PATS (Parents and Teachers at Simis) representative
- Committee to Evaluate Professional Teaching Standards
- District Representative to Marilyn Burns "Math Solutions"
- Planner/Facilitator for Family and Community Math Night K-5
- Coordinator Young Authors Day K-6

EDUCATION and CERTIFICATES

2004 Master of Education in Curriculum and Instruction
Arizona State University

1996 Bachelor of Arts in Elementary Education
Arizona State/ U.C. Santa Barbara/ Portland State

Arizona Certificate in Elementary Education (K-8)
Early Childhood Endorsement
Provisional Endorsement Bilingual Education

Natasha Camp

INNOVATIVE & TRANSFORMATIONAL EDUCATION LEADER

Education

Master of Arts in Education: Educational Leadership Northern Arizona University
Bachelor of Science: Education Northern Arizona University

Certifications

Principal Certification ESL Endorsement-Exp.12/20/2019
Arizona Teaching Certification: Standard Secondary 7-12, Biology, Physical Ed. K-12 Exp. 12/20/2019

Career Summary

Respected educational organization improvement leader with a proven track record in school transformation. Diverse expertise in school transformation, instructional strategies and teacher development. Fast paced, creative problem solver that adapts quickly to change and seeks creative out of the box solutions while making the best decisions with a student focus.

Strategic Problem Solver - Creative Visionary - Innovative Change Agent
Professional Learning Developer & Facilitator

- Adult Learning & Differentiation
- Streamline Systems for Effectiveness
- Program Development
- Continuous Improvement Cycle
- Utilize Team & Interest Based Approach
- Student Treasure Hunter
- Use Strategic Data Points to Modify Instructional Outcomes
- Culture & Climate Reform
- Collaborative Team Member
- Positive Relationships with all Stakeholders
- Instructional Theories & Application
- Develop Positive & Engaging Learning Environment

Educational Leadership

- Coached and developed teachers and PLC teams through a continuous improvement cycle process in order to increase student achievement
- Built capacity in teachers by promoting their self-reflection, differentiated learning, created structures to promote teacher learning & develop accountability systems
- Utilized continuous improvement process & data to drive outcomes in student achievement, teaching strategies, teacher development, program effectiveness, improvement plan implementation and professional development
- Developed and maintained positive community relations with organizations to offer alternative pathways to success for all stakeholders in the community, including parents & families
- Oversaw development of school & grade level plans, from needs assessment, creation of plan, identification of trends, set / implement goals to analyzing data and overall evaluation of plan effectiveness
- Collaborated with National Consultant from Solution Tree to develop Professional Learning Communities throughout all organization levels. Allows for PLC's to gain a deeper knowledge of student & teacher learning, identify learning gaps and create an individual data portrait with strategic goals & solutions for increased gains & achievement

Principal / Instructional Leader

- Improved academic status of a school from "C" to "B" in one year's time increasing growth points by 13
- Mentored grade level teams & teachers in Professional Learning Communities, research based practices to enhance their knowledge, apply new learning and receive feedback for modifications
- Designed, delivered & evaluated professional learning / training for the following: Team Leads, School Programs, Content Teams, Curriculum, Special Education, Improvement Planning and Data Driven Decision Making based on the needs of adult learners to improve teaching strategies & instructional delivery
- Developed effective & efficient resources through a variety of media for students, teachers, principals, parents and other professional learning communities (Guides, Google sites, organizational / visual flow charts, etc…) to maintain 2 way communication, offer resources and learning tools

Educational Technology

- Developed Prezi's, Google Sites and eLearning options for teachers as a professional learning tool
- Familiar with ShareDrive document creation and sharing for use with weekly newsletters and other communiqué

CAREER HISTORY

Administrator for Instructional Leadership Development, Phoenix, AZ 2015-Current

Maricopa County Education Agency (MCESA)
• Support principals in the development of School Continuous Improvement Plans (CIP) based on student achievement data and teacher effectiveness data derived from Performance-Based Management System.
• Develop professional development training modules and job-embedded experiences to support successful performance on teacher, instructional coach, and principal evaluations at the most exemplary proficiency levels to identify candidates for recruitment to instructional leadership positions.
• Develop professional training modules and job-embedded experiences to support educators in preparing for next position on desired career pathway.
• Provide professional development and coaching to support principals in utilizing change leadership principles with new and continuing goal initiatives to promote a positive school community and shared meaning and support for school improvement.
• Facilitate Principal communities of practice to promote networking, collaboration, problem solving, and peer-to-peer mentoring amongst school leaders.

Principal, Westwind Elementary School, Sonoran Sky Elementary School Phoenix, AZ 2009-2014

Pendergast Elementary School District
• Improved academic status of Westwind Elementary School from "C Label" to "B Label" in one year growing 13 points
• Responsible for education of 1200 K-8 students. Oversaw curriculum implementation, delivery and on-going student learning and achievement
• Recruited, hired, and trained staff
• Established site-based teams such as Kids at Hope and Girls and Boys Town leadership teams
• Restored school culture & climate of campus; empowered teachers and students
• Established positive working relationships with parents & members of the community
• Utilized data to target data driven instruction through standards based lesson planning
• Supported teachers in best teaching practices, classroom management and delivery of instruction
• Created & delivered professional development for staff members
• Maintained priority for student achievement and campus safety
• Wrote and monitored school improvement-301 plan and evaluated progress.
• Evaluated and developed certified staff (beginning and continuing) through observation of instruction, use of District Evaluation tool and development of educator goal plans
• Managed budget to ensure that resources were spent in accordance with 301, School Improvement, Title 1 regulations
• Facilitated the implementation of a school wide Behavior / Discipline Plan and Success Plans for students in need of additional support

Assistant Principal, Villa De Paz Elementary School, Sonoran Sky Elementary School Phoenix, AZ 2006-2009

Pendergast Elementary School District
• Supported Principal in receiving, distributing, and communicating information to enforce school, district, and state policies
•Managed student conduct and processed disciplinary matters including those involving suspension, alternative placement and/or long term suspension
• Evaluated and developed certified staff through observation of instruction, use of the District evaluation tool and development of educator goal plans
• Coordinated and supervised transportation, custodial, cafeteria and other support services campus wide
• Assisted with instructional leadership on the campus and within the District
• Planned and implemented staff development
• Assisted principal in directing professional learning communities (PLC's)
• Assisted principal in schedule development
• Site assessment coordinator for district and state level reading, math & writing assessments
• Supervised instructional assistants- schedule, evaluated & coached

Teaching Experience

8th Grade Science Teacher: Garden Lakes Elementary School
Pendergast Elementary School District Avondale, AZ 2001-2006

Physical Education Teacher (grades 1-8): Garden Lakes Elementary School
Pendergast Elementary School District Avondale, AZ 1999-2001

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Teaching Outcome Summary

- Implemented curriculum embedded in the Arizona State Standards using research based strategies, peer collaboration, technology and individual projects / units
- Designed & delivered engaging and differentiated lesson plans for students of various learning styles and expected outcomes
- Assessed student learning using weekly & quarterly assessments
- Utilized student data to modify teaching delivery
- Collaborated with grade level / content area team to plan instruction & design assessments aligned with standards
- Communicated with parents daily regarding student progress
- Instruct English Language Learners using SEI strategies
- Integrate resources within the community
- Assess and analyze student data
- Interim administration in absence of current administration – managing student behavior / discipline, parent meetings and observing classrooms

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Achievements/Activities

- Recipient of Teacher of the Year- 2003
- Thinking Maps Trainer of Trainer
- Chair of Principal Evaluation Committee
- Member of Strategic Planning Committee

Memberships to Professional Organizations

- Educational Leadership Membership
- Association for Supervision & Curriculum Development Membership (ASCD)

Computer & Technology Skills

Skills: Advanced proficiency in Word, Power Point, Internet
Technology Programs: Proficient in Smartboard, Smart Slate, Prezi Presentation, Excel, Google Drive Components, Social Media

Marlys Weaver-Stoesz

[redacted]

EMPLOYMENT HISTORY

Maricopa County Education Service Agency, Phoenix, Ariz. Sept. 2014 to present

Administrator of marketing and communications

- Create and implement campaigns for telling agency's story through print materials, web content, and social media
- Cultivate relationships with potential customers and partners
- Stay abreast of political, economic and social landscapes impacting education

dba Marlys Weaver-Stoesz, self-employed, Goshen, Ind. Sept. 2013 to Jan. 2015

Public relations and marketing content producer

- Create engaging text, photo and video marketing pieces for organizations and companies
- Proofread and edit articles, calendars, advertisements and other marketing materials
- Collaborate with individuals in creating online professional multimedia portfolios
- Follow news and current affairs relevant to campaigns and companies' messages

The Elkhart Truth/ElkhartTruth.com, Elkhart, Ind. April 2010 to Sept. 2013

Reporter

- Develop multi-faceted story packages, including writing stories, taking photos, developing sidebars and overseeing video, often on same-day deadlines
- Pursue and develop contacts with area education leaders, teachers, parents, and advocacy groups
- Maintain a WordPress blog, Facebook page and Twitter account focused on local education

EDUCATION

Goshen College, Goshen, Ind.

Bachelor of Arts degree in Journalism, April 2010

ADDITIONAL HIGHLIGHTS

- Board member of Arizona School Public Relations Association, June 2016 to present
- Member of Arizona School Public Relations Association, Spring 2015 to present
- Member of Public Relations Society of American, October 2014 to present
- Three month learning experience in Lima and Chanchamayo, Peru, May to July 2009

[redacted]

ERIC HOCKMAN

PROFILE

Constantly seeks areas to learn and grow as a professional. Utilized opportunities presented to tackle challenging problems and develop relationships with colleagues.

Flexible and versatile – able to maintain a sense of calmness under pressure. Poised and competent with demonstrated ability to easily transcend cultural differences. Thrive in deadline-driven environments. Excellent team-building & communication skills.

EXPERIENCE

Data Management System Project Lead

- Managed the development and implementation of the REILize Decision Support System.
- Maintained relationships with vendors connected to the development of the data system and teacher effectiveness ratings (i.e., Arizona Department of Education, Basis Policy Research, True North Logic, & Battelle for Kids).
- Gathered requirements for HCMS reports, rostering tool, observation capture tools, educator profile page, and user-interface, aligned to the vision of the REIL initiative.
- Facilitated User Acceptance Testing for new development inside of the REILize Decision Support System.
- Facilitated weekly Field Specialist meetings regarding upcoming functionality and the status of the A2Z Payout Process.
- Implemented a streamlined approach to the data tasks required to calculate an educator effectiveness rating and compensation award.
- Developed the universe of scorecards with Basis Policy Research which includes every combination of possible performance measures an educator could possess.
- Developed supports and communication for internal and external stakeholders focused on the REILize Decision Support System and REIL Scores.

Teacher Evaluation System

- Completed over 100 rigorous teacher evaluation cycles within seven different school districts.
- Conducted co-observations with site-based administrators that developed mutual trust & respect within a collaborative relationship.
- Facilitated Cognitive Coaching sessions with principals and coaches to support in their understanding of the Learning Observation Instrument.
- Collaborated with Field Specialists to develop and implement frameworks for support based on the Learning Observation Instrument and content knowledge.
- Developed Educator Goal Plan samples to support site-based administrators in goal writing and the implementation process.

Professional Development

- Designed and presented multiple professional development opportunities aligned to the Learning Observation Instrument and Trainer of Trainers Learning Series.
- Presented College and Career Readiness Standards Phase 2: Mathematics Content Knowledge to superintendents, principals, coaches, and teachers
- Facilitated site-based PLCs with a focus on best practices and mathematical content knowledge.

Instruction

- Multiple years of experience in teaching 1st grade, junior high mathematics, & junior high science classes.
- Developed and implemented a problem based learning curriculum for classrooms partnered with the Interactive Video Learning program.
- Implemented CGI and small group instruction into an upper level mathematics classroom.

EMPLOYMENT HISTORY

Professional Development Resource Coordinator/RDSS Project Lead	Maricopa County Education Service Agency, Phoenix, AZ	June 2014 to Present
Peer Evaluator	Maricopa County Education Service Agency, Phoenix, AZ	July 2012 to June 2014
Interactive Video Instructor	Maricopa County Education Service Agency, Phoenix, AZ	May 2011 to June 2012
1st grade & Mathematics Teacher	Dysart Unified School District, Surprise, AZ	July 2007 to May 2011
Junior High Mathematics and Science Teacher	Peoria Unified School District, Glendale, AZ	January 2005 to June 2007

RESPONSIBILITIES & SKILLS

- Data Management System Project Lead
- Gathering Concise Requirements
- PLC Team Lead
- Strategic Planning Expert Team
- Mathematics Liaison
- Technology Background & Support
- Professional Development Facilitation
- Certified Evaluator
- 21st Century Learner Committee
- PBL Articulation Committee
- Gifted Cadre
- Mathematics Cadre
- School Testing Coordinator
- Building & Nurturing Relationships

EDUCATION

UNIVERSITY OF PHOENIX — **PHOENIX, AZ**
Master of Arts in Education/Administration and Supervision — Currently Enrolled

NORTHERN ARIZONA UNIVERSITY — **FLAGSTAFF, AZ**
Bachelor of Science in Elementary Education; Summa Cum Laude — December 2004

ENDORSEMENTS

- Middle School Mathematics
- High School Mathematics
- Middle School Science

REFERENCES

Dr. Lori Renfro – [redacted] — **MCESA, Phoenix, AZ**
Assistant Superintendent of Human Capital Management Systems

Dr. Janice Johnson – [redacted] — **MCESA, Phoenix, AZ**
REIL-TNG Program Director

April Black – [redacted] — **MCESA, Phoenix, AZ**
REIL Field Specialist & Assistant Principal

MARICOPA COUNTY JOB DESCRIPTION

REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP – EXTEND (REIL-Extend)

TIF 5 PROJECT LEADER

MARKET RANGE TITLE:	**EDUCATION SVCS ASSISTANT SUPERINTENDENT**
DEPARTMENT:	**EDUCATION SERVICE AGENCY**
DIVISION/SECTION/UNIT:	**TEACHING AND LEARNING (LOW ORG 3750)**
FLSA STATUS:	**EXEMPT**
CLASSIFIED/UNCLASSIFIED:	**UNCLASSIFIED**
POSITION NUMBER:	**68182**

PURPOSE STATEMENT:
Responsible for leading program staff and partners to successfully complete all goals, objective and activities associated with REIL-Extend. Ensures efficient coordination and communication across all program partners. Will ensure successful completion of annual grant requirements, and work collaboratively with REIL Advisory Council, LEAs and grant Partners.

The TIF 5 Project Director:
1. Manages the REIL Extend management team.
2. Ensures adherence to grant requirements.
3. Coordinates contractual services.
4. Oversees annual and interim performance reporting.

PRIMARY INDICATORS/DUTIES:

The Primary Indicators/Descriptors include, but are not limited to:

1. **<u>Manage the REIL Extend management team.</u>**
   1.1. Analyzes data sources to prioritize topics for discussion and decision.
   1.2. Sets agenda for REIL-Extend Advisory Council Meetings.
   1.3. Develops and nurtures relationships with REIL- Extend Advisory Board.
   1.4. Determines performance metrics for REIL-Extend management team.
   1.5. Supervises the performance metrics for REIL-Extend management team.
   1.6. Evaluates the REIL-Extend management team.

2. **Ensure adherence to grant requirements.**
   2.1. Continually reviews grant requirements to ensure compliance.
   2.2. Uses multiple data sets to evaluate progress.
   2.3. Uses multiple management strategies to focus and re-focus work.

3. **Coordinate contractual services.**
   3.1. Monitors District, State and Federal financial management regulations and policies as they relate to Performance-Based Compensation Systems; informs REIL Program Director of potential problems and/or changes in regulations and policies.
   3.2. Ensures compliance with policies, federal grant guidelines, laws, and regulations; provides direction in planning staff development programs for personnel.
   3.3. Provides professional development to appropriate staff regarding financial management.

4. **Oversees annual and interim performance reporting**
   4.1. Ongoing coordination of all partners and staff in regards to data collection.
   4.2. Overseeing reporting requirements.
   4.3. Ensures all reports are accurate and clearly detailed.
   4.4. Maintains open communication with the US Department of Education.
   4.5. Publishes research findings for use in the field.

REPORTING STRUCTURE:

A. Supervision Received:
- Deputy Superintendent

B. Supervision Exercised:
- REIL-Extend Project Leader
- Opportunity Culture Project Leader
- Data Management System Project Leader
- Administrative Assistant

QUALIFICATIONS*

A. Minimum education and/or experience:
- Arizona administrative certification.
- Masters degree in Education.
- Minimum of five (5) years administrative experience in teaching and learning.

B. Other combinations of education, experience, or training that may be considered in substitution for the minimum requirements:

C. Preferred education and/or experience:
- Experience as school and/or district administrator.
- Experience with implementation of teacher evaluation systems or performance-

- Doctorate degree in Educational Leadership or related field.

D.Knowledge, Skills, and Abilities:

- Knowledge of research methods and techniques used in studying educational programs, including project planning, methodology, reporting, and processes.
- Strong practical and theoretical knowledge of school improvement, performance based compensation systems, curriculum, and professional development.
- Ability to plan, organize and facilitate the application, management, and administration of federal and state entitlements, grants, and other funds.
- Excellent interpersonal, leadership, and communication skills.
- Effective planning, organizational, and time management skills.
- The ability to work well under pressure in a multi-task environment.
- Ability to apply professional knowledge and administrative ability to the specific education project.
- Ability to reason logically and think independently and creatively on educational projects.
- Computer Literate: Microsoft Word, Excel, PowerPoint, Access, Outlook, Project and Internet Research.
- Knowledge of statutory law, case law, federal regulations and state regulations governing the operations of education service agencies in Arizona.

E.Specialized training, certifications, or other special requirements:

- Fingerprint Clearance
- Driver's License

F.Preferred special requirements:

G.Special working conditions:

- Exempt and not covered employees are not subject to the FLSA's overtime requirements, and Maricopa County does not provide additional pay to an exempt or not covered employee when he/she works beyond his/her normal work schedule hours, or when he/she works or records more than 40 hours in a workweek.

*Degrees/credits must be from an academically accredited college or university as recognized by the U.S. Department of Education (USDE) or the Council for Higher Education (CHEA)

MARICOPA COUNTY JOB DESCRIPTION

REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP - EXTEND (REIL-Extend)

LEADERSHIP ADMINISTRATOR

MARKET RANGE TITLE:	**EDUCATION SERVICE PROGRAM MANAGER**
DEPARTMENT:	**EDUCATION SERVICE AGENCY**
DIVISION/SECTION/UNIT:	**TEACHING AND LEARNING (LOW ORG 3750)**
FLSA STATUS:	**EXEMPT**
CLASSIFIED/UNCLASSIFIED:	**UNCLASSIFIED/CONTRACT**
SALARY:	**$33.44 – $45.32 (69,555 – 94,265)**

PURPOSE STATEMENT:
Responsible for ensuring effective development, delivery and implementation of professional development aligned to leading, learning and coaching series.

- Builds a shared vision, fosters development of group goals, and communicates high performance expectations.
- Designs and implements a leadership capacity development program equipping teachers and principals for increasing leadership effectiveness and capacity.
- Builds collaborative cultures, structures the organization for success, and connects with districts and other service agencies to increase principal instructional leadership capacity.

PRIMARY INDICATORS/DUTIES:
The Primary Indicators/Descriptors include, but are not limited to:

1.0 <u>Builds a shared vision, fosters development of group goals, and communicates high performance expectations.</u> *(Standards 1 and 2)*

1.1 Coordinates with the REIL-Extend school districts the Vision, mission, and agreed upon goals, objectives, and tactical action plans for the effective and efficient implementation of Performance-Based Management Systems for Teachers and Principals.

1.2 Supports principals in the development of School Continuous Improvement Plans (CIP) based on student achievement data and teacher effectiveness data derived from Performance-Based Management System.
1.3 Supports principals in the development of Professional Development Plans aligned to CIP.
1.4 Represents Maricopa County Education Service Agency to all State and County Coalitions designed to accomplish mutual goals and objectives that will further promulgate successful implementation of Performance-Based Compensation Systems.

2.0 Designs and implements a leadership capacity development program equipping teachers and principals for increasing leadership effectiveness and capacity.

2.1 Develops professional development training modules and job-embedded experiences to support successful performance on teacher, instructional coach, and principal evaluations at the most exemplary proficiency levels to identify candidates for recruitment to instructional leadership positions.
2.2 Develops professional training modules and job-embedded experiences to support educators in preparing for next position on desired career pathway.
2.3 Develops and implements a screening tool to identify applicants to leadership training programs with high potential for future success as a principal.
2.4 Designs and implements assessments for instructional leadership professional development program components in alignment with principal evaluation Performance-Based Compensation System.
2.5 Assists with the alignment of the National Principal Performance Standards to a school district's Principal Evaluation System as approved by Governing Board Policies.
2.6 Utilizes Principal Standards to assist REIL-Extend school districts to implement a Performance Based Principal Evaluation System that is based upon at least 50% student achievement data.

3.0 Builds collaborative cultures, structures the organization for success, and connects with districts and other service agencies to increase principal instructional leadership capacity. (Standard 4)

3.1 Assists REIL-Extend school district leadership and school principals in developing coordination of inter-connected systems to support continuous school improvement and the implementation of Performance Based Compensation Systems.
3.2 Provides professional development and coaching to support principals in utilizing change leadership principles with new and continuing goal initiatives to promote a positive school community and shared meaning and support for school improvement.
3.3 Facilitates Principal communities of practice to promote networking, collaboration, problem solving, and peer-to-peer mentoring amongst school leaders.
3.4 Provides guidance and support to principals in planning and facilitating effective site leadership teams that result in effective implementation of tactical action steps in CIPs.

3.5 Collaborates with other MCESA staff.

3.6 Provides professional development training and calibration of scoring to ensure effective and efficient implementation of *"Inter-Rater Reliability Standards"* for all REIL-Extend member school Principals/Classroom Evaluators.

3.7 Provides professional development training and calibration of scoring to ensure effective and efficient implementation of *"Inter-rater Reliability Standards"* for all REIL-Extend Superintendents/Principal Evaluators.

3.8 Provides support to Superintendents or designees in the development of Principal Professional Goal Plans and District administrative professional development plans to promote differentiated administrative training and support.

3.9 Builds internal capacity by providing training and support to an internal cadre of administrators and teachers to ensure/maintain high levels of inter-rater reliability within and between schools.

REPORTING STRUCTURE

A. Supervision Received:

- Assistant Superintendent of Educational Innovation

B. Supervision Exercised:

- Professional Development Coordinators

QUALIFICATIONS*

A. Minimum education and/or experience:

- Arizona Principal Certification
- A Masters degree in Education
- Minimum of five (5) years administrative experience in teaching and learning
- Extensive experience in staff development, teacher evaluation and school improvement
- Successful experience as school principal
- Extensive experience in supervision of personnel in a variety of capacities.

B. Other combinations of education, experience, or training that may be considered in substitution for the minimum requirements:

C. Preferred education and/or experience:

- Direct experience with implementation of teacher/principal evaluation or performance based incentives
- Doctorate

D. Knowledge, Skills, and Abilities:

- Knowledge of research methods and techniques used in studying educational programs, including project planning, methodology, reporting, and processes.
- Strong practical and theoretical knowledge of school improvement, performance based compensation systems, curriculum, teacher and professional development.

- Ability to plan, organize and facilitate the application, management, and administration of federal and state entitlements, grants, and other funds.
- Excellent interpersonal, leadership, and communication skills.
- Effective planning, organizational, and time management skills.
- The ability to work well under pressure in a multi-task environment.
- Ability to apply professional knowledge and administrative ability to the specific education project.
- Ability to reason logically and think independently and creatively on educational projects.
- Computer Literate: Microsoft Word, Excel, PowerPoint, Access, Outlook, Project and Internet Research.
- Knowledge of statutory law, case law, federal regulations and state regulations governing the operations of education service agencies in Arizona.

E. Specialized training, certifications, or other special requirements:

- AZ Principal Certification
- Fingerprint Clearance
- Driver's License

F. Preferred special requirements:

- AZ Superintendent or Interim Superintendent Certification

G. Special working conditions:

*Degrees/credits must be from an academically accredited college or university as recognized by the U.S. Department of Education (USDE) or the Council for Higher Education (CHEA).

MARICOPA COUNTY JOB DESCRIPTION

REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP - EXTEND (REIL-Extend)

VIDEOGRAPHER

MARKET RANGE TITLE:	**MEDIA SPECIALIST**
DEPARTMENT:	**EDUCATION SERVICE AGENCY**
DIVISION/SECTION/UNIT:	**EDUCATIONAL INNOVATION (LOW ORG 3750)**
FLSA STATUS:	**NON – EXEMPT**
CLASSIFIED/UNCLASSIFIED:	**CONTRACT/UNCLASSIFIED**
POSITION NUMBER:	**69156**

PURPOSE STATEMENT:
Responsible for **supporting the performance-based evaluation system** through the technical production and electronic distribution of video modeling educational settings. Supports the performance-based evaluation system by:

- Ensuring communication and stakeholder involvement.
- Creating a video repository for professional development.
- Collaborating with stakeholders to determine production schedule.

PRIMARY INDICATORS/DUTIES:

The Primary Indicators/Descriptors include, but are not limited to:

1.0 <u>Ensuring Communication and Stakeholder Involvement:</u>

1.1 Produces videos to be included on Rewarding Excellence in Instruction and Leadership: The Next Generation (REIL-Extend) web page.

1.2 Leads production of video communications including strategy and timeline development, coordinating design, producing and distributing of finished video products to REIL-Extend program stakeholders.

1.3 Ensures consistent, accurate, and aligned message and image in video communications to maintain quality control for all video productions.

1.4 Uses results from REIL-Extend stakeholder feedback to design target video communications.

2.0 <u>Creating a Video Repository for Professional Development:</u>

2.1 Creates a video bank of teaching and leading in action for training REIL-Extend District evaluators.

2.2 Reviews literature related to REIL-Extend program goals and strategic branding to ensure consistent message.

2.3 Researches, writes, and develops supporting story lines; consults with REIL-Extend Management regarding specific needs for video productions.

3.0 <u>Collaborating with Stakeholders to Determine Production Schedule</u>

3.1 Collaborating program staff to determine priority videos.
3.2 Maintaining an online calendar to communicate availability with program staff.
3.3 Communicating with teachers and administrators the details (date, time, technical information) prior to video taping sessions.

REPORTING STRUCTURE

A. Supervision Received:
- Administrator for Educational Technology

B. Supervision Exercised:
- None

QUALIFICATIONS:

A. Minimum education and/or experience:
- BA/BS or higher degree in graphic design or multi-media; journalism, communications, or media production.
- 2+ years video - visual design experience.

B. Other combinations of education, experience, or training that may be considered in substitution for the minimum requirements:

C. Preferred education and/or experience:
- 7+ years visual design experience.
- 2+ years experience designing complex, information-driven applications.
- Classroom teacher experience.

D. Knowledge, Skills, and Abilities:
- A portfolio with examples of video - visual design that provide solutions to complex classroom practice and a thorough understanding of interaction and video design principles.
- Strong conceptual, design, and production skills.
- Strong attention to details.
- Ability to communicate conceptual ideas and design rationale.
- Expert level experience with design authoring tools.
- Understand the design implications of fundamental Web technologies.
- Experience collaborating with others on user interfaces and interaction designs.
- Strong interpersonal skills.
- The ability to work well under pressure in a multi-task environment.
- Effective planning, organization, and customer service skills.
- Ability to gather and analyze data, reason logically, follow written and oral instructions, draw valid conclusions, and make appropriate recommendations.

E. Specialized training, certifications, or other special requirements:

F. Preferred special requirements:

G. Special working conditions:

***Degrees/credits must be from an academically accredited college or university as recognized by the U.S. Department of Education (USDE) or the Council for Higher Education (CHEA)**

MARICOPA COUNTY JOB DESCRIPTION

REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP - EXTEND (REIL-Extend)

PROFESSIONAL DEVELOPMENT RESOURCE COORDINATOR

MARKET RANGE TITLE:	**EDUCATION SERVICE PROGRAM COORDINATOR**
DEPARTMENT:	**EDUCATION SERVICE AGENCY**
DIVISION/SECTION/UNIT:	**TEACHING AND LEARNING (LOW ORG 3750)**
FLSA STATUS:	**EXEMPT**
CLASSIFIED/UNCLASSIFIED:	**UNCLASSIFIED/CONTRACT**
POSITION NUMBER:	**68838**

PURPOSE STATEMENT

The Professional Development Coordinator is responsible for providing ongoing professional development to school and district teachers, administrators, and other personnel that improves student academic progress. The Professional Development Coordinator provides technical assistance, educational materials, training and support, and other arrangements for the successful implementation of job-embedded, systematic, professional development aligned to REIL-EXTEND: Extend Learning, Coaching, and Leading observation instruments and Arizona's Academic Standards.

- Design and Develop Quality Professional Development
- Ensure Job-Embedded Professional Development in Partner School Districts

PRIMARY DUTIES

1.0 <u>Design and Develop Quality Professional Development</u>

1.1 Analyze needs assessments to identify prioritized, targeted areas of support aligned to LEA and school improvement plans.

1.2 Analyze SAI professional development survey data by school, district, REIL-Extend alliance, and County.

1.3 Develop professional development priority schedule for module and workshop development in collaboration with REIL-Extend and Education Innovations.

1.4 Develop high quality professional development trainer-of-trainer modules including scripts, slides, handouts, videos, and other materials for REIL-Extend Learning, Coaching, and Peer Evaluator Series.

1.5 Collaborate with Standards and Assessment Administrator to design training for the development of common formative assessments, analysis of multiple data

sources, interpretation of data, and adjustments to instructional planning aligned to elements on REIL-Extend observation instruments.

1.6 Collaborate with REIL-Extend Resource Professional Development Coordinator to select, score, and annotate videos for professional development.

1.7 Evaluate the effectiveness of REIL-Extend professional development.

2.0 <u>Ensure Job-Embedded Professional Development in Partner School Districts</u>

2.1 Design professional development to ensure that teachers and principals will understand the specific measures of teacher and principal effectiveness included in performance-based management systems.

2.2 Collaboratively design partner district and/or school professional development plans in alignment to district strategic plans or school improvement plans with identified support systems to improve instructional and leadership effectiveness.

2.3 Provide coaching and feedback to schools and districts in analyzing the effectiveness of professional development plans based on student achievement data and educator evaluation data evidence.

2.4 Provide training to coaches, mentors, and/or peer evaluators to improve educator effectiveness aligned to REIL-Extend observation instruments including best practices for coaching teachers including building relationships, setting coaching objectives, establishing and scheduling coaching cycles and monitoring, instructional analysis, reliable evaluation scoring, coaching conferences, individual growth plans, PLC facilitation, and site leadership team participation.

2.5 Provide follow-up coaching support to field specialists and district trainer of trainers on implementation of REIL-Extend professional development workshops and job-embedded coaching support and monitoring systems.

2.6 Design on-going professional development modules to meet the needs of teachers and leaders based upon results of Learning, Leading and Coaching Evaluation Instruments.

REPORTING STRUCTURE

A. Supervision Received:

- Administrator for Instructional Innovation

B. Supervision Exercised: None

QUALIFICATIONS*

- **Minimum education and/or experience:**
  - Bachelor's degree in Education
  - At least 2 years instructional coaching experience
  - At least 5 years successful teaching and/or administrative experience

- **Other combinations of education, experience, or training that may be considered in substitution for the minimum requirements:**
  - Experience presenting and facilitating professional development for adult participants

- **Preferred education and/or experience:**
  - Master's degree

- **Knowledge, Skills, and Abilities:**

  - Must possess exemplary knowledge of content and pedagogy with flexibility to apply in multiple grades K-12

- An understanding of Learning Forward standards for professional development
- Must be a team player with a willingness to meet school and department goals and requests.
- Must be willing to take direction and follow through in a timely and professional manner.
- Must be able to manage time and independently initiate tasks in a sometimes ambiguous environment
- Must be highly organized and professional in demeanor at all times.
- Must possess a working knowledge of Microsoft Office products including: Outlook, Word, PowerPoint or Keynote, Excel, Pages or InDesign, and Internet Explorer.
- Professional development creation and implementation
- Data analysis and communication
- Must be able to interface and collaborate a variety of multiple school district personnel on a variety of levels
- Must be able to express complex ideas clearly and concisely in writing and verbal discourse

- **Specialized training, certifications, or other special requirements:**
  - Arizona Class 1 Fingerprint clearance
  - Valid Arizona Teaching Certification
  - Valid AZ Driver's License

- **Preferred special requirements:**

- **Special working conditions:**

  *Degrees/credits must be from an academically accredited college or university as recognized by the U.S. Department of Education (USDE) or the Council for Higher Education (CHEA)

MARICOPA COUNTY JOB DESCRIPTION

REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP - EXTEND (REIL-Extend)

PEER EVALUATOR

MARKET RANGE TITLE:	**EDUCATION SERVICE PEER EVALUATOR**
DEPARTMENT:	**EDUCATION SERVICE AGENCY**
DIVISION/SECTION/UNIT:	**REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP (LOW ORG 3750)**
FLSA STATUS:	**EXEMPT**
CLASSIFIED/UNCLASSIFIED:	**CONTRACT/UNCLASSIFIED**
POSITION NUMBER:	**TBD**

PURPOSE STATEMENT:
Responsible for **increasing and retaining the number of effective and highly effective teachers** across partner districts through professional development, observation, and evaluation aligned to the Learning Observation Instrument. Increases and retains the number of effective and highly effective teachers by:

- Enhancing Culture
- Assessing Performance
- Implementing Professional Learning
- Designing Support

PRIMARY INDICATORS/DUTIES:

The Primary Indicators/Descriptors include, but are not limited to:

1.0 <u>Enhancing Culture</u>

1.1 Ensures that the REIL-Extend vision and mission is regularly communicated, shared and understood by stakeholders.

1.2 Demonstrates a commitment to the objectives of the REIL-Extend program.

1.3 Makes data-driven decisions and provides teachers /schools the assistance and appropriate tools they need for increasing student academic progress.

1.4 Regularly utilizes continuous improvement process based on data to plan and refine job-embedded professional development.

1.5 Exhibits personal accountability and integrity, including the maintenance of confidentiality regarding teacher evaluations and evaluation-related information.

1.6 Develops knowledge and skills, that will result in increased student academic progress and achievement, through ongoing professional learning and feedback from REIL team members.

2.0 Assessing Performance

2.1 Collaborates with building-level administrators on establishment of Educator Goal Plans for assigned teachers.

2.2 Holds teachers to high standards in delivering high-quality learning experiences for students that result in increased student academic progress and achievement.

2.3 Collaborates with building level administrator(s) to assess assigned group of *master educators*.

2.4 Collaborates with REIL-Extend Field Specialist(s) and building-level administrators to conduct informal data sweeps to maintain the norming process for conducting high quality evaluations.

2.5 Maintains accuracy of scoring and demonstrates inter-rater reliability in order to remain in the peer evaluator cadre.

2.6 Meets all statutory, policy, and program deadlines concerning performance evaluation.

2.7 Assists teachers, master educators, and administrators in interpreting all aspects of the REIL Score.

3.0 Implementing Professional Learning

3.1 Supports teachers with job-embedded content- and pedagogy-based coaching in alignment with established educator goal plans.

3.2 Uses data from educator goal plans to collaboratively design professional development and support systems to improve instructional effectiveness resulting with increased student academic progress and achievement.

3.3 Provides specific feedback to teachers and *master educators* using REIL Observation instruments.

4.0 Designing Support

4.1 Communicates frequently and effectively with all stakeholders.

4.2 Utilizes appropriate instruments, tools, and other resources to support teachers in the continuous improvement process.

4.3 Gathers feedback from teachers to self-evaluate and improve performance that will result with increased student academic progress and achievement.

4.4 Collaborates with REIL field specialists, fellow peer evaluators and building-level administrators to provide specific support to help teachers to improve and succeed as evidenced by increased student academic progress and achievement.

4.5 Prepares quality written feedback to assigned teachers and master educators that will result in increased student academic progress and achievement.

REPORTING STRUCTURE

A. Supervision Received:

- REIL-Extend Field Specialists

B. Supervision Exercised:

- None

QUALIFICATIONS*

A. Minimum education and/or experience:

- Passing score on STEP (Selecting Teachers to Enter Pathways) screening
- Arizona Teacher Certification
- A Master's degree in Education or equivalent experience/coursework
- Minimum of five (5) years teaching experience as an effective classroom teacher
- Content-specific and/or grade-level band specific teaching experience (e.g., high school mathematics, K-3 literacy)
- Experience in developing and implementing professional development programs

B. Other combinations of education, experience, or training that may be considered in substitution for the minimum requirements:

- 60 or more credit hours (in an appropriate coursework pertinent to the position) beyond a Bachelor's degree
- Bachelor's degree and at least 3 years of experience in a peer evaluator or instructional coach role

C. Preferred education and/or experience:

- Arizona Principal or Supervisor Certification
- Master's degree in content area
- Minimum of five (5) years administrative experience in teaching and learning
- Minimum 3.0 GPA in content-area course-work
- Experience providing feedback to teachers via a performance-based evaluation system

D. Knowledge, Skills, and Abilities:

- Developed expertise in a content area and/or grade level.
- Evidence of exhibiting highly effective instruction that leads to student academic progress.
- Strong pedagogical content knowledge

- Strong practical and theoretical knowledge of performance-based evaluation and compensation systems, curriculum and assessment, and teacher professional development.
- Effective planning, organizational, and time-management skills.
- Excellent interpersonal, leadership, and communication skills.
- Computer Literate: Microsoft Word, Excel, PowerPoint, Access, Email, and Internet Research.
- The ability to work well under pressure in a multi-task environment.
- Ability to reason logically and think independently and creatively on educational projects.

E. Specialized training, certifications, or other special requirements:

- Arizona Fingerprint Clearance Card
- Valid Arizona Teacher Certificate in area of interest
- Arizona Driver's License
- Highly Qualified in Content Area

F. Preferred special requirements:

G. Special working conditions:

***Degrees/credits must be from an academically accredited college or university as recognized by the U.S. Department of Education (USDE) or the Council for Higher Education (CHEA)**

MARICOPA COUNTY JOB DESCRIPTION

REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP - EXTEND (REIL-Extend)

OPPORTUNITY CULTURE PROJECT LEADER

MARKET RANGE TITLE:	**EDUCATION SVCS PROGRAM MANAGER**
DEPARTMENT:	**EDUCATION SERVICE AGENCY**
DIVISION/SECTION/UNIT:	**EDUCATIONAL INNOVATION (LOW ORG 3750)**
FLSA STATUS:	**EXEMPT**
CLASSIFIED/UNCLASSIFIED:	**UNCLASSIFIED/REGULAR**
POSITION NUMBER:	**75057**

PURPOSE STATEMENT:
Responsible for leading MCESA Opportunity Culture design team to ensure effective implementation and adherence to guiding principles. Serves as point of contact for Public Impact and collaborates to monitor project progress while managing the overall plan for the work and ensuring MCESA team builds capacity to ensure successful gradual release.

Facilitates processes for LEA partners to:
1. Commit to building an Opportunity Culture.
2. Make district-level design decisions.
3. Secure school-level commitment & pre-plan for success.
4. Make major school-level design decisions.
5. Communicate and prepare for classroom implementation.
6. Implement reach models and Opportunity Culture supports.
7. Evaluate and refine models.

PRIMARY INDICATORS/DUTIES:

The Primary Indicators/Descriptors include, but are not limited to:

1. <u>Commit to building an Opportunity Culture.</u>
- 1.1. Secure commitment among district leadership to extend the reach of excellent teachers and build an Opportunity Culture;
- 1.2. Organize district design team to drive design and implementation;
- 1.3. Assess district readiness; and

1.4. Set overall vision for initiative.

2. **Make district-level design decisions.**
   2.1. Establish selection criteria for participating schools;
   2.2. Begin developing an Opportunity Culture Plan to guide implementation, and start redesigning the district systems that need to change;
   2.3. Determine acceptable design parameters and school models;
   2.4. Launch development of new district talent policies and practices;
   2.5. Launch development of new resources and infrastructure policies;
   2.6. Begin planning for teacher and community engagement; and
   2.7. Ensure a supportive policy environment.

3. **Secure school-level commitment & pre-plan for success.**
   3.1. Introduce the Opportunity Culture/reach extension concepts to school leadership teams;
   3.2. Secure school-level commitments to the work;
   3.3. Select school design teams and introduce the initiative; and
   3.4. Conduct school needs assessment.

4. **Make major school-level design decisions.**
   4.1. Begin drafting school-level Opportunity Culture plans;
   4.2. Create a school-level vision of an Opportunity Culture;
   4.3. Select school models;
   4.4. Develop staffing plans; and
   4.5. Develop scheduling plans.

5. **Communicate and prepare for classroom implementation.**
   5.1. Prepare for classroom implementation by completing district- and school-level planning, and starting implementation in talent, resources, and infrastructure;
   5.2. Plan for and begin communicating with teachers, staff, and other key stakeholders; and
   5.3. Plan for and begin communicating with parents and community members.

6. **Implement reach models and Opportunity Culture supports.**
   6.1. Complete implementation of Opportunity Culture plans for year 1;
   6.2. Engage school design teams in ongoing school-level adjustments; and
   6.3. Continue to communicate with and receive input from educators, parents, and key community members about schools' efforts to reach more students with excellent teachers.

7. **Evaluate and refine models.**
   7.1. Identify staff or external evaluator(s) to lead the evaluation of the Opportunity Culture initiative;
   7.2. Determine evaluation measures and align them with existing evaluation efforts;
   7.3. Develop and/or customize evaluation tools, process steps, and roles;
   7.4. Write a short evaluation plan; and
   7.5. Implement the evaluation and improve reach implementation based on findings.

REPORTING STRUCTURE:

A. Supervision Received:
- REIL-Extend Project Director

B.Supervision Exercised:

QUALIFICATIONS*

A.Minimum education and/or experience:
- Arizona administrative certification.
- Masters degree in Education.
- Minimum of five (5) years administrative experience in teaching and learning.

B.Other combinations of education, experience, or training that may be considered in substitution for the minimum requirements:

C.Preferred education and/or experience:
- Experience as school and/or district administrator.
- Experience with implementation of teacher evaluation systems or performance-based incentives.

D.Knowledge, Skills, and Abilities:
- Knowledge of research methods and techniques used in studying educational programs, including project planning, methodology, reporting, and processes.
- Strong practical and theoretical knowledge of school improvement, performance based compensation systems, curriculum, and professional development.
- Ability to plan, organize and facilitate the application, management, and administration of federal and state entitlements, grants, and other funds.
- Excellent interpersonal, leadership, and communication skills.
- Effective planning, organizational, and time management skills.
- The ability to work well under pressure in a multi-task environment.
- Ability to apply professional knowledge and administrative ability to the specific education project.
- Ability to reason logically and think independently and creatively on educational projects.
- Computer Literate: Microsoft Word, Excel, PowerPoint, Access, Outlook, Project and Internet Research.
- Knowledge of statutory law, case law, federal regulations and state regulations governing the operations of education service agencies in Arizona.

E.Specialized training, certifications, or other special requirements:
- Fingerprint Clearance
- Driver’s License

F.Preferred special requirements:

G.Special working conditions:

- Exempt and not covered employees are not subject to the FLSA's overtime requirements, and Maricopa County does not provide additional pay to an exempt or not covered employee when he/she works beyond his/her normal work schedule hours, or when he/she works or records more than 40 hours in a workweek.

*Degrees/credits must be from an academically accredited college or university as recognized by the U.S. Department of Education (USDE) or the Council for Higher Education (CHEA)

MARICOPA COUNTY JOB DESCRIPTION

REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP – EXTEND (REIL-Extend)

MEASUREMENT COORDINATOR

MARKET RANGE TITLE;	**EDUCTION SERIVE PROGRAM COORDINATOR**
DEPARTMENT:	**EDUCATION SERVICE AGENCY**
DIVISION/SECTION/UNIT:	**EDUCATIONAL INNOVATION (LOW ORG 3750)**
FLSA STATUS:	**EXEMPT**
CLASSIFIED/UNCLASSIFIED:	**UNCLASSIFIED/CONTRACT**
SALARY:	**$28.85 – $39.29 (60,008 – 81,723)**

PURPOSE STATEMENT:
Responsible for developing valid and reliable assessments for secure and non-secure interim assessments through the facilitation of assessment development committees. Develops valid and reliable assessments for secure and non-secure interim assessments by:
1. Facilitating assessment development and procurement.
2. Developing district capacity to design valid and reliable assessments.

PRIMARY INDICATORS DUTIES:

The Primary Indicators/Descriptors include, but are not limited to:

1.0 <u>Facilitating Assessment Development and Procurement</u>

1.1 Facilitates the development of assessment items for use in secure non-state-tested subject area assessments; and non-secure items in all subject areas for the development of local school common assessments or district interim assessments.

1.2 Procures and evaluates vendor services to develop assessments.

1.3 Develops and maintains systems documents outlining the persons responsible, the tasks and the time lines associated with core assessment department project management. Continually revises these documents as necessary to accurately reflect the processes currently in operation or development.

1.4 Plans the use of assessment instruments that use technology to assist in the reporting and analysis of results, including disaggregation of subgroup achievement data.

2.0 <u>Developing District Capacity to Design Valid and Reliable Assessments</u>

2.1 Collaborates with principals and teacher leaders to design performance rubrics aligned with curriculum.

2.2 Evaluates district assessments for alignment of content and rigor to Arizona State Content Standards.

2.3 Develops internal capacity of schools and districts to design test blueprints to monitor the academic progress and learning needs of students.

3.0 **<u>Evaluating Assessment Items for Validity and Reliability</u>**

3.1 Collects and analyzes data for psychometric analysis to ensure development of assessment items meets strict guidelines for validity and reliability.

3.2 Authors technical documents related to assessment validity and reliability

3.3 Conducts research studies of assessment tools

REPORTING STRUCTURE

A. Supervision Received:
   - Administrator for Assessment
   -

B. Supervision Exercised:
   - N/A

QUALIFICATIONS*

A. Minimum education and/or experience:
   - Bachelor's degree in education or psychology; three years experience as a test-item writer in a K-12 organization.

B. Other combinations of education, experience, or training that may be considered in substitution for the minimum requirements:'
    - Knowledge of writing performance-based assessment items and rubrics, especially selected-response items with multiple levels of feedback.

C. Preferred education and/or experience:
    - Master's degree, preferred concentrations: educational psychology, educational assessment, measurement and testing, curriculum and instruction, instructional design.

D. Knowledge, Skills, and Abilities:
    - Core Standard knowledge in multiple content areas; ability to evaluate alignment of assessment items to Core Standard; experience writing and reviewing a high volume and high variety of robust assessment items; Group facilitation skills to generate assessment products; Knowledge of creating training and documentation around writing performance-based assessment items and rubrics, especially selected-response items with multiple levels of feedback.

E. Specialized training, certifications, or other special requirements:
    - Knowledge and skills of basic psychometric analysis
    - Knowledge and skills of research and evaluation practices
    - Remains knowledgeable of all State accountability initiatives for the purpose of participating in state and local accountability workshops and committees.
    - Candidate may be asked to provide writing samples and test-item samples.
    - Fingerprint clearance card

F. Preferred special requirements:
    - Ability to articulate a solid understanding of measurement and psychometrics related to norm and criterion referenced testing; alternate assessment item development; and alignment to grade-level standards; innovative computer-based item development.

G. Special working conditions:

*Degrees/credits must be from an academically accredited college or university as recognized by the U.S. Department of Education (USDE) or the Council for Higher Education (CHEA)

MARICOPA COUNTY JOB DESCRIPTION

REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP – EXTEND (REIL-Extend)

MARKETING COORDINATOR

MARKET RANGE TITLE:	**COMMUNICATION OFFICER/GOVERNMENT LIAISON**
DEPARTMENT:	**EDUCATION SERVICE AGENCY**
DIVISION/SECTION/UNIT:	**EXECUTIVE LEADERSHIP (LOW ORG 3710)**
FLSA STATUS:	**EXEMPT**
CLASSIFIED/UNCLASSIFIED:	**UNCLASSIFIED/REGULAR**
POSITION NUMBER:	**67622**

PURPOSE STATEMENT

The Marketing Coordinator will coordinate and execute the recruitment marketing efforts of all REIL-Extend Alliance Local Education Agencies (LEA) by:

- Collaborating with LEAs and MCESA program management staff to identify the LEA's "core competencies;"
- Developing a marketing strategy aligned to "core competencies" for each LEA;
- Developing a marketing tactical plan aligned to strategy for each LEA;
- Managing the development and production of marketing products for each LEA.

PRIMARY INDICATORS/DUTIES:

The Primary Indicators/Descriptors include, but are not limited to:

1.0 <u>Collaborate with LEAs and MCESA program management staff to identify the LEA's "core competencies."</u>

1.1 Develop relationships with LEA leadership in coordination with MCESA program staff.

1.2 Develop an understanding of the all educational "core competencies."

1.3 Develop an understanding of each LEA's desired "core competences" using multiple data points.

2.0 <u>Develop a marketing strategy aligned to "core competencies" for each LEA.</u>

2.1 Collaborate with LEA leadership teams to determine *the story* that needs to be told.
2.2 Collaborate with LEA leadership teams to determine desired marketing demographic.
2.3 Collaborate with LEA leadership teams to create a multi-year marketing strategy.

3.0 <u>Develop a marketing tactical plan aligned to strategy for each LEA.</u>

3.1 Conduct audits of LEA's existing marketing collateral (website, brochures, social media, etc.).
3.2 Make recommendations based on "core competencies," marketing strategy, and audit findings.
3.3 Determine feasibility of recommendations based on LEA's capacity.
3.4 Build out multi-year tactical plan based on findings and capacity.

4.0 <u>Managing the development and production of marketing products for each LEA.</u>

4.1 Oversee the design and develop recruitment webpages/websites that exist within the LEA's environment.
4.2 Oversee the design and publishing electronic and print recruitment brochures and posters.
4.3 Oversee the design and production of recruitment videos.
4.4 Oversee the staging, shooting, and editing of recruitment photographs.

REPORTING STRUCTURE

A. Supervision Received: Director of Learning and Communication Systems

B. Supervision Exercised: None

QUALIFICATIONS*

A. Minimum education and/or experience:
   - Bachelor's degree in Journalism, Communications, Marketing, Media Production or related field.
   - Three to five years of public or private sector experience with ascending responsibility in marketing, communications, public relations and/or media relations, with demonstrated successes in raising the public profile(s) of organization(s) served.

B. Other combinations of education, experience, or training that may be considered in substitution for the minimum requirements:
   - Experience or training that may be considered substitution for the minimum requirements.

C. Preferred education and/or experience:
   - Knowledge of or experience in public education processes, issues and school systems.
   - Experience in marketing and communications related to education.

D. Knowledge, Skills, and Abilities:
   - Skill and experience in development and management of websites.
   - Skill and experience in design and production of print materials.
   - Skill and experience in the design and production of electronic communications.
   - Skill and experience in planning and organizing projects and work tasks.
   - Skill and experience in exercising sound judgment in the performance of all job tasks.
   - Ability to work independently with minimal supervision.

E. Specialized training, certifications, or other special requirements:

F. Preferred special requirements:
   - Skill in photographic composition and execution.
   - Skill in the design and production of videos.

G. Special working conditions:
   - Exempt and not covered employees are not subject to the FLSA's overtime requirements, and Maricopa County does not provide additional pay to an exempt or not covered employee when he/she works beyond his/her normal work schedule hours, or when he/she works or records more than 40 hours in a workweek.

*Degrees/credits must be from an academically accredited college or university as recognized by the U.S. Department of Education (USDE) or the Council for Higher Education (CHEA)

MARICOPA COUNTY JOB DESCRIPTION

REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP - EXTEND (REIL-Extend)

DATA COORDINATOR / MANAGEMENT ANALYST

MARKET RANGE TITLE:	**MANAGEMENT ASSISTANT**
DEPARTMENT:	**EDUCATION SERVICE AGENCY**
DIVISION/SECTION/UNIT:	**REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP (LOW ORG 3750)**
FLSA STATUS:	**NON - EXEMPT**
CLASSIFIED/UNCLASSIFIED:	**CONTRACT/UNCLASSIFIED**
POSITION NUMBER:	**68817**

PURPOSE STATEMENT:
Responsible for supporting the implementation of a Human Capital Management System, by collaborating with partner districts to collect valid and reliable assessment data.

Supports the implementation of a Human Capital Management System by:
1. Working collaboratively with the REIL-Extend Management Team, Arizona Department of Education (ADE), and partner school districts.
2. Providing administrative support functions related to data collection, data integrity, software/application development, and program communication.
3. Creating structures for communication and collaboration across partner school districts, Maricopa County Education Service Agency (MCESA), and ADE.
4. Providing psychometric services to support assessment development and assessment outcomes.

PRIMARY INDICATORS/DUTIES:

The Primary Indicators/Descriptors include, but are not limited to:

1. <u>Working Collaboratively with the REIL-Extend Management Team, ADE, and Partner School Districts</u>

1.1 Gather data from disparate school district data systems into an integrated data management system.

1.2 Manages quantitative and qualitative data collection activities in collaboration with REIL-Extend personnel in order to support REIL-Extend program implementation.

2. <u>Providing Administrative Support Functions Related to Data Collection, Data Integrity, Software/Application Development, and Program Communication</u>

2.1 Works with program personnel to support analysis, collection, storage, creation, and validation of project data needed for inclusion in the REILize Decision Support System (RDSS).

2.2 Collaborates with program personnel in the design, development, management, and maintenance of the data visualization environment and reports for the RDSS.

2.3 Keeps abreast of updates and changes to district data system changes through frequent communication with district staff responsible for providing district data needed for the RDSS.

2.4 Works collaboratively to develop and implement processes to enable users to review, modify, or verify information contained in the RDSS throughout the year.

2.5 Employs aggregate reporting and cell suppression methodology to protect the identity and privacy of individuals.

2.6 Uses public information and research-based knowledge of issues and trends to collaboratively work with all stakeholders.

2.7 Categorizes and extracts appropriate information from meeting minutes to assist with REIL-Extend program goals, objectives, and performance measures.

2.8 Provides backup to other service areas as needed, and other duties as assigned by the REIL-Extend Program Director.

2.9 Attends meetings as assigned for the purpose of conveying and/or gathering information required to perform functions.

3. <u>Creating Structures for Communication and Collaboration Across Partner School Districts, MCESA, and ADE</u>

3.1 Produces written communication that is clear, correct, and appropriate to the audience.

3.2 Supports REIL staff in the coordination of REIL-Extend program activities as they relate to data use and data management systems.

3.3 Provides technical support to school district personnel, REIL-Extend staff, and ADE staff to access and use project data in a safe, secure, and appropriate manner as dictated by district, county, state, and federal data requirements and agreements (e.g. FERPA).

3.4 Responds to and contributes to the resolution of data collection, validation, and reporting challenges encountered by school district personnel.

3.5 Researches and compiles background information from REIL-Extend districts and other sources for the preparation and submission of grant requirements.

3.6 Researches and compiles formative and summative data from REIL-Extend districts and other sources for communication and monitoring of program progress.
3.7 Maintains confidentiality as required to effectively support implementation of the REIL-Extend program.
3.8 Establishes and maintains procedures to protect the rights of students and staff and adhere to policies and laws.
3.9 Demonstrates sensitivity and cultural proficiency when interacting with all stakeholders.
3.10 Actively participates in REIL-Extend team professional development opportunities, reads current research and literature, and attends key meetings to ensure expertise relative to scope of work.
3.11 Serves as back-up Help Desk support for the RDSS.
3.12 Researches and compiles background information from districts and other sources for the preparation and submission of grant documentation.
3.13 Develops and maintains appropriate documentation of REIL-Extend activities, policies, and progress; collaborates in the development of project reports, updates, and presentations to stakeholder audiences as required.
3.14 Assists in the review and preparation of appropriate content updates for the REIL-Extend website.

4. <u>Providing Psychometric Services to Support Assessment Development and Assessment Outcomes</u>

4.1 Collaborate with MCESA Research/Assessment staff to establish scope of project and determine best course of action for assessment item development, field-testing, and validation.
4.2 Advise on psychometric principles and assessment methods.
4.3 Provide technical assistance with psychometric analysis.
4.4 Provide technical assistance with psychometrics (from student outcomes/assessments) such as scoring, reporting, and documentation.

REPORTING STRUCTURE

A. Supervision Received:
- Standards and Assessment Administrator

B. Supervision Exercised:
- None

QUALIFICATIONS*

A. Minimum education and/or experience:
- Undergraduate degree (business, education, social sciences) in a field related to the collection, coordination, and use of qualitative and quantitative data in the implementation of a performance-based management system.

B. Other combinations of education, experience, or training that may be considered in substitution for the minimum requirements:
   - Three years of experience related to at least one of the following:
     - School district student information/management systems
     - School district human resource systems
     - School district assessment systems
     - Other school district data systems
   - 2 or more years' experience in the development of a Learning Management System, Content Management/Delivery System, and/or data management system.
   - Demonstrated proficiency in the extraction of data from school district systems
   - Experience facilitating or participating in course-mapping processes/procedures to assist in the verification of student-teacher linkages that result in performance-based incentives
- Some college level coursework related to job duties

C. Preferred education and/or experience:
   - Arizona Teacher Certification
   - Experience working with statistical analysis programs (e.g., SPSS, Excel)
   - Working knowledge of database systems (e.g. MS SQL)

   - Experience working in an Arizona school district technology and/or curriculum/assessment department or at a state education agency (e.g., Arizona Department of Education)

D. Knowledge, Skills, and Abilities:
   - Ability to collect, compile, and verify the integrity of large volumes of qualitative and quantitative data.
   - Proficient in the use of Microsoft Outlook, Word, Excel, PowerPoint, Access, SQL scripts, & Internet.
   - Strong working knowledge and ability to collect, manage, report, and coordinate student information within school districts following FERPA requirements.
   - Strong working knowledge of ways to legally disseminate student information with officially sanctioned partners, and entities following FERPA requirements.
   - Strong working knowledge of data articulation between Student Information Systems.
   - Demonstrated ability to provide technical data guidance and support to school district personnel and other stakeholders.
   - Demonstrated ability to effectively prioritize multiple tasks and projects under the constraints of strict deadlines and time pressures.
   - Ability to determine the source of problems and provide immediate and long-term resolution to problems.
   - Ability to travel to MCESA school districts, both local and remote.
   - Strong interpersonal, customer service, communication, and telephone skills.
   - Evidence of collaborative skills.
   - Excellent communication skills (written and oral).
   - Evidence of problem solving ability.
   - Resourceful and adaptable.
   - Willingness to perform up to the highest measure of competence.

- Respected professionally.

E. Specialized training, certifications, or other special requirements:
   - Fingerprint Clearance
   - Background Clearance
   - Driver's License

F. Preferred special requirements:

G. Special working conditions:

*Degrees/credits must be from an academically accredited college or university as recognized by the U.S. Department of Education (USDE) or the Council for Higher Education (CHEA)

MARICOPA COUNTY JOB DESCRIPTION

REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP - EXTEND (REIL-Extend)

LMS RESOURCE COORDINATOR

MARKET RANGE TITLE:	**EDUCATION SERVICE PROGRAM COORDINATOR**
DEPARTMENT:	**EDUCATION SERVICE AGENCY**
DIVISION/SECTION/UNIT:	**TEACHING AND LEARNING (LOW ORG 3750)**
FLSA STATUS:	**EXEMPT**
CLASSIFIED/UNCLASSIFIED:	**UNCLASSIFIED/CONTRACT**
POSITION NUMBER:	**68838**

PURPOSE STATEMENT

The LMS Resource Coordinator is responsible for coordination of course development for the on-line learning management system. The LMS Resource Coordinator will coordinate the content for courses delivered via LMS by:

1. Designing and developing quality professional development resources.
2. Designing and developing the online learning environment.
3. Management the learning management system.
4. Coordinating with partners to manage the event management system.

PRIMARY INDICATORS/DUTIES:

1. <u>Design and develop quality professional development resources.</u>

1.1 Analyze needs assessments to identify prioritized, targeted areas of support aligned to LEA and school improvement plans.

1.2 Develop professional development priority schedule for module and workshop development in collaboration with LEA and MCESA partners.

1.3 Develop high quality professional development trainer-of-trainer modules including scripts, slides, handouts, videos, and other materials for REIL-Extend Learning, Coaching, and Peer Evaluator Series.

1.4 Collaborate with Standards and Assessment Administrator to design training for the development of common formative assessments, analysis of multiple data

sources, interpretation of data, and adjustments to instructional planning aligned to elements on REIL-Extend observation instruments.

1.5 Collaborate with REIL-Extend Resource Professional Development Coordinator to select, score, and annotate videos for professional development.

1.6 Evaluate the effectiveness of REIL-Extend professional development.

2. <u>Design and develop the online learning environment.</u>

2.1 Develop expertise in the learning management system (LMS).

2.2 Design compelling and interactive courses that meet the needs of MCESA and LEA stakeholders.

2.3 Evaluate the effectiveness of courses based on a variety of data sources.

3. <u>Management the learning management system.</u>

3.1 Assign roles and permissions in the LMS.

3.2 Coordinate and deliver training on LMS features to appropriate stakeholders.

3.3 Design and manage the resources uploaded into the LMS.

3.4 Ensure resources are backed up and cataloged according to the Common Education Data Standards (CEDS).

4. <u>Coordinate with partners to manage the event management system.</u>

4.1 Assign roles and permissions in the event management system (EMS).

4.2 Coordinate and deliver training on EMS features to appropriate stakeholders.

4.3 Ensure courses are being entered in accordance to MCESA and CEDS standards.

REPORTING STRUCTURE:

A. Supervision Received:
- Administrator for Instructional Innovation

B. Supervision Exercised: None

QUALIFICATIONS*

A. Minimum education and/or experience:
- Bachelor's degree in Education
- At least 2 years instructional coaching experience
- At least 5 years successful teaching and/or administrative experience

B. Other combinations of education, experience, or training that may be considered in substitution for the minimum requirements:
- Experience presenting and facilitating professional development for adult participants

C. Preferred education and/or experience:
- Master's degree

D. Knowledge, Skills, and Abilities:

- Must possess exemplary knowledge of content and pedagogy with flexibility to apply in multiple grades K-12
- An understanding of Learning Forward standards for professional development
- Must be a team player with a willingness to meet school and department goals and requests.
- Must be willing to take direction and follow through in a timely and professional manner.
- Must be able to manage time and independently initiate tasks in a sometimes ambiguous environment
- Must be highly organized and professional in demeanor at all times.
- Must possess a working knowledge of Microsoft Office products including: Outlook, Word, PowerPoint or Keynote, Excel, Pages or InDesign, and Internet Explorer.
- Professional development creation and implementation
- Data analysis and communication
- Must be able to interface and collaborate a variety of multiple school district personnel on a variety of levels
- Must be able to express complex ideas clearly and concisely in writing and verbal discourse

E. Specialized training, certifications, or other special requirements:
- Arizona Class 1 Fingerprint clearance
- Valid Arizona Teaching Certification
- Valid AZ Driver's License

F. Preferred special requirements:

G. Special working conditions:
- Exempt and not covered employees are not subject to the FLSA's overtime requirements, and Maricopa County does not provide additional pay to an exempt or not covered employee when he/she works beyond his/her normal work schedule hours, or when he/she works or records more than 40 hours in a workweek.

*Degrees/credits must be from an academically accredited college or university as recognized by the U.S. Department of Education (USDE) or the Council for Higher Education (CHEA)

MARICOPA COUNTY JOB DESCRIPTION

REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP - EXTEND (REIL-Extend)

LEARNING, LEADING, AND COACHING PROFESSIONAL DEVELOPMENT COORDINATOR

MARKET RANGE TITLE:	**EDUCATION SERVICE PROGRAM COORDINATOR**
DEPARTMENT:	**EDUCATION SERVICE AGENCY**
DIVISION/SECTION/UNIT:	**TEACHING AND LEARNING (LOW ORG 3750)**
FLSA STATUS:	**EXEMPT**
CLASSIFIED/UNCLASSIFIED:	**UNCLASSIFIED/CONTRACT**
POSITION NUMBER:	**68838**

PURPOSE STATEMENT

Responsible for **developing talent in teaching and leading through a sustainable, comprehensive program** by designing and delivering professional development in content and pedagogy aligned to the Learning, Leading, and Coaching Observation Instruments. Develops talent in leading through a sustainable, comprehensive program by:

- Designing and developing quality professional development.
- Ensuring job-embedded professional development in partner school districts.

PRIMARY INDICATORS/DUTIES:

The Primary Indicators/Descriptors include, but are not limited to:

1.0 <u>Designing and Developing Quality Professional Development</u>

- **1.1** Analyze needs assessments to identify prioritized, targeted areas of support aligned to LEA and school improvement plans.
- **1.2** Analyze SAI professional development survey data by school, district, REIL alliance, and County.
- **1.3** Develop professional development priority schedule for module and workshop development in collaboration with REIL-Extend and Education Innovations.

1.4 Develop high quality professional development trainer-of-trainer modules including scripts, slides, handouts, videos, and other materials for REIL-Extend Learning, Leading, Coaching, and Peer Evaluator Series.

1.5 Collaborate with Standards and Assessment Administrator to design training for the development of common formative assessments, analysis of multiple data sources, interpretation of data, and adjustments to instructional planning aligned to elements on REIL-Extend observation instruments.

1.6 Collaborate with REIL-Extend Resource Professional Development Coordinator to select, score, and annotate videos for professional development.

1.7 Evaluate the effectiveness of REIL-Extend professional development.

2.0 <u>Ensuring Job-Embedded Professional Development in Partner School Districts</u>

2.1 Design professional development to ensure that teachers and principals will understand the specific measures of teacher and principal effectiveness included in performance-based management systems.

2.2 Collaboratively design partner district and/or school professional development plans in alignment to district strategic plans or school improvement plans with identified support systems to improve instructional and leadership effectiveness.

2.3 Provide coaching and feedback to schools and districts in analyzing the effectiveness of professional development plans based on student achievement data and educator evaluation data evidence.

2.4 Provide training to coaches, mentors, and/or peer evaluators to improve educator effectiveness aligned to REIL-Extend observation instruments including best practices for coaching teachers including building relationships, setting coaching objectives, establishing and scheduling coaching cycles and monitoring, instructional analysis, reliable evaluation scoring, coaching conferences, individual growth plans, PLC facilitation, and site leadership team participation.

2.5 Provide follow-up coaching support to field specialists and district trainer of trainers on implementation of REIL-Extend professional development workshops and job-embedded coaching support and monitoring systems.

2.6 Design on-going professional development modules to meet the needs of teachers and leaders based upon results of Learning, Leading and Coaching Evaluation Instruments.

REPORTING STRUCTURE

A. Supervision Received:

- REIL-Extend Project Director

B. Supervision Exercised: None

QUALIFICATIONS*

- **Minimum education and/or experience:**
  - Bachelor's degree in Education
  - At least 2 years instructional coaching experience

- At least 5 years successful teaching and/or administrative experience

- **Other combinations of education, experience, or training that may be considered in substitution for the minimum requirements:**
    - Experience presenting and facilitating professional development for adult participants

- **Preferred education and/or experience:**
    - Master's degree

- **Knowledge, Skills, and Abilities:**

    - Must possess exemplary knowledge of content and pedagogy with flexibility to apply in multiple grades K-12
    - An understanding of Learning Forward standards for professional development
    - Must be a team player with a willingness to meet school and department goals and requests.
    - Must be willing to take direction and follow through in a timely and professional manner.
    - Must be able to manage time and independently initiate tasks in a sometimes ambiguous environment
    - Must be highly organized and professional in demeanor at all times.
    - Must possess a working knowledge of Microsoft Office products including: Outlook, Word, PowerPoint or Keynote, Excel, Pages or InDesign, and Internet Explorer.
    - Professional development creation and implementation
    - Data analysis and communication
    - Must be able to interface and collaborate a variety of multiple school district personnel on a variety of levels
    - Must be able to express complex ideas clearly and concisely in writing and verbal discourse

- **Specialized training, certifications, or other special requirements:**
    - Arizona Class 1 Fingerprint clearance
    - Valid Arizona Teaching Certification
    - Valid AZ Driver's License

- **Preferred special requirements:**

- **Special working conditions:**

  *Degrees/credits must be from an academically accredited college or university as recognized by the U.S. Department of Education (USDE) or the Council for Higher Education (CHEA)

MARICOPA COUNTY JOB DESCRIPTION

REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP - EXTEND (REIL-Extend)

LEADERSHIP ADMINISTRATOR

MARKET RANGE TITLE:	**EDUCATION SERVICE PROGRAM MANAGER**
DEPARTMENT:	**EDUCATION SERVICE AGENCY**
DIVISION/SECTION/UNIT:	**TEACHING AND LEARNING (LOW ORG 3750)**
FLSA STATUS:	**EXEMPT**
CLASSIFIED/UNCLASSIFIED:	**UNCLASSIFIED/CONTRACT**
SALARY:	**$33.44 – $45.32 (69,555 – 94,265)**

PURPOSE STATEMENT:
Responsible for ensuring effective development, delivery and implementation of professional development aligned to leading, learning and coaching series.

- Builds a shared vision, fosters development of group goals, and communicates high performance expectations.
- Designs and implements a leadership capacity development program equipping teachers and principals for increasing leadership effectiveness and capacity.
- Builds collaborative cultures, structures the organization for success, and connects with districts and other service agencies to increase principal instructional leadership capacity.

PRIMARY INDICATORS/DUTIES:
The Primary Indicators/Descriptors include, but are not limited to:

1.0 <u>Builds a shared vision, fosters development of group goals, and communicates high performance expectations.</u> *(Standards 1 and 2)*

1.1 Coordinates with the REIL-Extend school districts the Vision, mission, and agreed upon goals, objectives, and tactical action plans for the effective and efficient implementation of Performance-Based Management Systems for Teachers and Principals.

1.2 Supports principals in the development of School Continuous Improvement Plans (CIP) based on student achievement data and teacher effectiveness data derived from Performance-Based Management System.
1.3 Supports principals in the development of Professional Development Plans aligned to CIP.
1.4 Represents Maricopa County Education Service Agency to all State and County Coalitions designed to accomplish mutual goals and objectives that will further promulgate successful implementation of Performance-Based Compensation Systems.

2.0 Designs and implements a leadership capacity development program equipping teachers and principals for increasing leadership effectiveness and capacity.

2.1 Develops professional development training modules and job-embedded experiences to support successful performance on teacher, instructional coach, and principal evaluations at the most exemplary proficiency levels to identify candidates for recruitment to instructional leadership positions.
2.2 Develops professional training modules and job-embedded experiences to support educators in preparing for next position on desired career pathway.
2.3 Develops and implements a screening tool to identify applicants to leadership training programs with high potential for future success as a principal.
2.4 Designs and implements assessments for instructional leadership professional development program components in alignment with principal evaluation Performance-Based Compensation System.
2.5 Assists with the alignment of the National Principal Performance Standards to a school district's Principal Evaluation System as approved by Governing Board Policies.
2.6 Utilizes Principal Standards to assist REIL-Extend school districts to implement a Performance Based Principal Evaluation System that is based upon at least 50% student achievement data.

3.0 Builds collaborative cultures, structures the organization for success, and connects with districts and other service agencies to increase principal instructional leadership capacity. (Standard 4)

3.1 Assists REIL-Extend school district leadership and school principals in developing coordination of inter-connected systems to support continuous school improvement and the implementation of Performance Based Compensation Systems.
3.2 Provides professional development and coaching to support principals in utilizing change leadership principles with new and continuing goal initiatives to promote a positive school community and shared meaning and support for school improvement.
3.3 Facilitates Principal communities of practice to promote networking, collaboration, problem solving, and peer-to-peer mentoring amongst school leaders.
3.4 Provides guidance and support to principals in planning and facilitating effective site leadership teams that result in effective implementation of tactical action steps in CIPs.

3.5 Collaborates with other MCESA staff.

3.6 Provides professional development training and calibration of scoring to ensure effective and efficient implementation of *"Inter-Rater Reliability Standards"* for all REIL-Extend member school Principals/Classroom Evaluators.

3.7 Provides professional development training and calibration of scoring to ensure effective and efficient implementation of *"Inter-rater Reliability Standards"* for all REIL-Extend Superintendents/Principal Evaluators.

3.8 Provides support to Superintendents or designees in the development of Principal Professional Goal Plans and District administrative professional development plans to promote differentiated administrative training and support.

3.9 Builds internal capacity by providing training and support to an internal cadre of administrators and teachers to ensure/maintain high levels of inter-rater reliability within and between schools.

REPORTING STRUCTURE

A. Supervision Received:

- Assistant Superintendent of Educational Innovation

B. Supervision Exercised:

- Professional Development Coordinators

QUALIFICATIONS*

A. Minimum education and/or experience:

- Arizona Principal Certification
- A Masters degree in Education
- Minimum of five (5) years administrative experience in teaching and learning
- Extensive experience in staff development, teacher evaluation and school improvement
- Successful experience as school principal
- Extensive experience in supervision of personnel in a variety of capacities.

B. Other combinations of education, experience, or training that may be considered in substitution for the minimum requirements:

C. Preferred education and/or experience:

- Direct experience with implementation of teacher/principal evaluation or performance based incentives
- Doctorate

D. Knowledge, Skills, and Abilities:

- Knowledge of research methods and techniques used in studying educational programs, including project planning, methodology, reporting, and processes.
- Strong practical and theoretical knowledge of school improvement, performance based compensation systems, curriculum, teacher and professional development.

- Ability to plan, organize and facilitate the application, management, and administration of federal and state entitlements, grants, and other funds.
- Excellent interpersonal, leadership, and communication skills.
- Effective planning, organizational, and time management skills.
- The ability to work well under pressure in a multi-task environment.
- Ability to apply professional knowledge and administrative ability to the specific education project.
- Ability to reason logically and think independently and creatively on educational projects.
- Computer Literate: Microsoft Word, Excel, PowerPoint, Access, Outlook, Project and Internet Research.
- Knowledge of statutory law, case law, federal regulations and state regulations governing the operations of education service agencies in Arizona.

E. Specialized training, certifications, or other special requirements:

- AZ Principal Certification
- Fingerprint Clearance
- Driver's License

F. Preferred special requirements:

- AZ Superintendent or Interim Superintendent Certification

G. Special working conditions:

*Degrees/credits must be from an academically accredited college or university as recognized by the U.S. Department of Education (USDE) or the Council for Higher Education (CHEA).

MARICOPA COUNTY JOB DESCRIPTION

REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP – EXTEND (REIL-Extend)

GRAPHIC DESIGNER

MARKET RANGE TITLE:	
DEPARTMENT:	**EDUCATION SERVICE AGENCY**
DIVISION/SECTION/UNIT:	**EXECUTIVE LEADERSHIP (LOW ORG 3710)**
FLSA STATUS:	**EXEMPT**
CLASSIFIED/UNCLASSIFIED:	**UNCLASSIFIED/REGULAR**
POSITION NUMBER:	**67622**

PURPOSE STATEMENT
The *REIL-Extend* Graphic Designer will be responsible for creating designs, concepts, and both comp and final layouts based on knowledge of layout principles and esthetic design concepts.

PRIMARY INDICATORS/DUTIES:
The Primary Indicators/Descriptors include, but are not limited to:

1.0 **Develop structures to support content experts in moving through the production environment. Standard 3**
- 1.1 Prepares work to be accomplished by gathering information and materials.
- 1.2 Utilizes ubiquitous technologies for content collaboration and communication prior to production.
- 1.3 Maintains a collaborative work environment by facilitating feedback loops throughout the production process.
- 1.4 Illustrates concept by designing rough layout of art and copy regarding arrangement, size, type size and style, and related aesthetic concepts.
- 1.5 Obtains approval of concept by submitting rough layout for approval.
- 1.6 Prepares finished copy and art by operating typesetting, printing, and similar equipment; purchasing from vendors.
- 1.7 Prepares final layout by marking and pasting up finished copy and art.

2.0 Study information in order to determine the most effective communication medium and production tools. Standard 5
- 2.1 Maintains an operational knowledge of best-in-class tools.
- 2.2 Advises content experts on most effective medium to communicate the message.

2.3 Ensures operation of equipment by completing preventive maintenance requirements; following manufacturer's instructions; troubleshooting malfunctions; calling for repairs; maintaining equipment inventories; evaluating new equipment.
2.4 Maintains technical knowledge by attending design workshops; reviewing professional publications; participating in professional societies.
2.5 Skilled in working with a wide variety of graphic file formats including: ai, psd, indd, jpeg, png, eps, tiff and pdf. Familiarity with Blender or other 3D applications, as well as Apple Pages, a plus. Knowledge of Macintosh operating system helpful.
2.6 Develop digital graphics and layouts for various print products, illustrations, logos, posters, signs, email blasts, booklets, pamphlets and Internet websites.
2.7 Retouch and repurpose both original and stock photography images.
2.8 Develop engaging PowerPoint presentations.

3.0 <u>Preparing finished products for distribution through multiple channels</u>. Standard 7

3.1 Completes projects by coordinating with outside agencies, art services, printers, etc.
3.2 Stays current on electronic distribution options.
3.3 Archives all products in multiple formats which allow content experts to update and re-submit for production.
3.4 Work both independently and within a group on multiple projects at once, take direction and proof own work.
3.5 Maintain and update all digital asset collections for the Agency, ensuring proper file naming conventions and backup procedures are met. Possibly assist in creation of a rigorous Digital Asset Management system for digital assets.

REPORTING STRUCTURE

A. Supervision Received: Director of Communication and Learning Systems

B. Supervision Exercised: None

QUALIFICATIONS*

A. Minimum education and/or experience:

- Bachelor's degree in Graphic Design, Web Design, Marketing, Media Production or related field.
- Three to five years of public or private sector experience with ascending responsibility.

B. Other combinations of education, experience, or training that may be considered in substitution for the minimum requirements:

- Experience or training that may be considered substitution for the minimum requirements.

C. Preferred education and/or experience:

- Knowledge of or experience in public education processes, issues and school systems.
- Background in positions such as web design, video production, and/or photography.

D. Knowledge, Skills, and Abilities:

- Expert level proficiency in Adobe Creative Suite, including vector graphic techniques in Illustrator; retouching, typographic treatment and photo manipulation in Photoshop; and page layout and design for both internal and outside print production in InDesign.

E. Specialized training, certifications, or other special requirements:

F. Preferred special requirements:

G. Special working conditions:

*Degrees/credits must be from an academically accredited college or university as recognized by the U.S. Department of Education (USDE) or the Council for Higher Education (CHEA)

MARICOPA COUNTY JOB DESCRIPTION

REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP - EXTEND (REIL-Extend)

FINANCIAL / BUSINESS SYSTEMS SPECIALIST

MARKET RANGE TITLE:	**FINANCE / BUSINESS ANALYST**
DEPARTMENT:	**EDUCATION SERVICE AGENCY**
DIVISION/SECTION/UNIT:	**ECONOMIC MANAGEMENT (LOW ORG 3720)**
FLSA STATUS:	**EXEMPT**
CLASSIFIED/UNCLASSIFIED:	**CONTRACT/UNCLASSIFIED**
POSITION NUMBER:	**68837**

PURPOSE STATEMENT:

Responsible for **managing the fiscal sustainability** of the Rewarding Excellence in Instruction and Leadership: The Next Generation (REIL-Extend) program through the leading and monitoring of all fiscal planning, transacting, and documenting. Manages the fiscal sustainability by:

- Ensuring all program activities are aligned to the program's goals and objectives.
- Ensuring fiscal responsibility and program compliance.
- Monitoring, documenting, and communicating fiscal activities.
- Supporting partner districts with fiscal management.
- Evaluating and developing fiscal plans for program success.

PRIMARY INDICATORS/DUTIES:

The Primary Indicators/Descriptors include, but are not limited to:

1.0 <u>Ensuring all Program Activities are Aligned to the Program's Goals and Objectives</u>

1.1 Supports REIL-Extend personnel in implementation of strategic plans aligned with the program's goals and objectives.

1.2 Ensures all interactions, both written and verbal, are aligned to the program's vision.

1.3 Assists program personnel and partner school districts in creating structures and processes to ensure effective financial management.

1.4 Establish performance objectives to ensure effective delivery of services.

2.0 <u>Ensuring Fiscal Responsibility and Program Compliance</u>

2.1 Supervise staff that provides business service support and financial management to schools districts.

2.2 Monitor the grants management system for changes and updates to respond to reporting requirements.

2.3 Collaborate with partner school districts as applicable in order to provide comprehensive support relating to Grant activities.

2.4 Organize and process purchase requisitions per County procurement code. Maintain a financial database developing and maintaining financial reports as required.
2.5 Compile necessary statistical data for the preparation of the fiscal budget and compliance.
2.6 Assume responsibility for grant completion reports and other financial documents.
2.7 In conjunction with program managers, prepare intergovernmental agreements and memorandums of understanding with various public entities.
2.8 Liaison with county procurement managers to prepare Requests For Proposals and otherwise insure that REIL-Extend adheres to county procurement policies and state procurement laws.

3.0 <u>Monitoring, Documenting, and Communicating Fiscal Activites</u>

3.1 Attends meetings as assigned for the purpose of conveying and/or gathering information required to perform functions.
3.2 Researches and compiles background information from districts and other sources for the preparation and submission of grant documentation.
3.3 Develops and maintains appropriate documentation of policies and progress; collaborates in the development of project reports, updates, and presentations to stakeholder audiences as required.
3.4 Assists in the review and preparation of appropriate content updates for the REIL-Extend website.
3.5 Produces written communication that is clear, correct, and appropriate to the audience.

4.0 <u>Supporting Partner Districts with Fiscal Management</u>

4.1 Audit and certify all federal and state grant required reports from the school districts, supported to ensure accuracy of records and compliance with Arizona Department of Education (ADE) requests and regulations as well as all Uniform Systems of Financial Records (USFR).
4.2 Design and deliver training and support to department and school personnel related to grant management and procurement procedures.
4.3 Liaison with districts concerning grant management, voucher processing, needed documents, fund status, and warrant status.
4.4 Communicate with school district and internal personnel to resolve outstanding issues.

5.0 **<u>Evaluating and Developing Fiscal Plans for Program Success</u>**

5.1 In collaboration with partners, develop a strategic and tactical plan for ensuring the effective, efficient and successful service delivery.
5.2 Develop plan(s) for measuring program success, goal attainment, and areas for continued growth based on research and best practice.
5.3 Provide monthly process reports, including expenditures to Executive Leadership.
5.4 Keeps abreast of changes to financial systems and USFR through frequent communication with ADE and Arizona Association of School Business Officials (AASBO).
5.5 Uses public information and research-based knowledge of issues and trends to collaboratively work with all stakeholders.

REPORTING STRUCTURE

A. Supervision Received:

- REIL-Extend Program Director

B. Supervision Exercised:

QUALIFICATIONS*

A. Minimum education and/or experience:

- Bachelor's Degree and a minimum of 2 years work experience in Business Services required.
- A minimum of one year experience in grants management and/or procurement required.
- A minimum of one year experience with the principles and practices of finance, budgeting and accounting required.
- Working experience with Microsoft Office products required.

B. Other combinations of education, experience, or training that may be considered in substitution for the minimum requirements:

- Associates degree in Business/Finance related field and 4 years experience in grants management and/or materials management.
- Three years experience in grant management and three years experience in governmental procurement.

C. Preferred education and/or experience:

- Experience in various facets of school finance including Federal and State grant management and accounts payable/receivable preferred.
- Preferred Accounting Degree or equivalent work experience with knowledge of the Arizona USFR accounting procedures, ADE grant reporting procedures, Visions and CIMS AS/400 computers.
- Procurement experience preferred.
- Experience in governmental budgeting/finance preferred.
- Experience of at least 2 years of accounting/bookkeeping/budget experience in a high volume schools finance environment.

D. Knowledge, Skills, and Abilities:

- Strong interpersonal skills.
- Excellent verbal and written communication skills.
- The ability to work well under pressure in a multi-task environment.
- The ability to deliver trainings to individuals, small and large audiences.
- Effective planning, organization, and customer service skills.
- Knowledge in the principles and practices of school finance, governmental budgeting

- Ability to gather and analyze data, reason logically, follow written and oral instructions, draw valid conclusions and make appropriate recommendations.
- Knowledge of the USFR, Arizona Revised Statues (ARS), and ADE requirements in relationship with federal and state grant projects.
- Proficiency with accounting, Infinite Visions Enterprise Edition (IVEE) software application, AS/400 software application, and a working knowledge of the ADE Grants Management Enterprise System.
- Proficiency with Microsoft Office products (Word, Excel, Access, PowerPoint).

E. Specialized training, certifications, or other special requirements:

F. Preferred special requirements:

- Grants management specialized training preferred.

- CAPA certification preferred

G. Special working conditions:

- N/A

*Degrees/credits must be from an academically accredited college or university as recognized by the U.S. Department of Education (USDE) or the Council for Higher Education (CHEA)

MARICOPA COUNTY JOB DESCRIPTION

REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP – EXTEND (REIL-Extend)

FIELD SPECIALIST

MARKET RANGE TITLE:	**EDUCATION SERVICE PROGRAM MANAGER**
DEPARTMENT:	**EDUCATION SERVICE AGENCY**
DIVISION/SECTION/UNIT:	**TEACHING AND LEARNING (LOW ORG 3750)**
FLSA STATUS:	**EXEMPT**
CLASSIFIED/UNCLASSIFIED:	**CONTRACT/UNCLASSIFIED**
POSITION NUMBER:	**68324, 68325, 68359**

PURPOSE STATEMENT:
Responsible for collaboratively building structures to sustain Human Capital Management and Performance Based Evaluation Systems through district-wide collaboration, communication, and professional development support. Builds structures to sustain Human Capital Management and Performance Based Evaluation Systems to ensure successful attainment of program goals by:

- Facilitating communication and stakeholder involvement.
- Ensuring rigorous, fair and transparent educator evaluations.
- Designing and deliver job-embedded professional development.
- Managing and supporting career pathway options.

PRIMARY INDICATORS/DUTIES:

The Primary Indicators/Descriptors include, but are not limited to:

1. **<u>Facilitating Communication and Stakeholder Involvement</u>**
   1.1. Facilitates Cross-District Leadership and Communication Teams (Human Capital Management System, Finance, Implementation Leads, Data Management and Assessment, and Performance-Based Evaluation).

1.2. Facilitates the creation of District Transition Teams for data management, teacher and principal evaluation, performance-based management, and professional development.
1.3. Facilitates feedback loop between District Leadership & Communication Teams, District Transition Teams, and Program Management Team.
1.4. Conducts regular meetings with teachers and principals so that they can ask questions and raise concerns about Performance-Based Management System.

2. <u>Ensuring Rigorous, Fair and Transparent Educator Evaluations</u>

2.1. Facilitates district level Teacher & Principal Evaluation Transition Teams in crosswalk/comparison of existing district evaluation tools(s).
2.2. Informs teachers of updates to evaluation instrument.
2.3. Creates modules for training and communication on new teacher and principal evaluation instruments.
2.4. Conducts training on evaluation system for all teachers.

3. <u>Designing and Delivering Job-Embedded Professional Development</u>

3.1. Provides professional development to ensure that teachers and principals will understand the specific measures of teacher and principal effectiveness included in the Performance-Based Compensation System.
3.2. Uses data from educator growth plans to collaboratively analyze and design Rewarding Excellence in Instruction and Leadership: The Next Generation (REIL-Extend) District professional development and support systems to improve instructional and leadership effectiveness.

4. <u>Managing and Supporting Career Pathway Options</u>

4.1. Coordinates with REIL-Extend Program Management Team and Advisory Council to finalize career pathway models/options.
4.2. Facilitates and advises school districts on which career pathways they will offer.

REPORTING STRUCTURE

A. Supervision Received:

•REIL-Extend Program Director

B. Supervision Exercised:

- REIL-Extend Peer Evaluators

QUALIFICATIONS*

A. Minimum education and/or experience:

- Arizona Principal or Supervisor Certification.
- Master's degree in Education.
- Minimum of five (5) years administrative experience in teaching and learning.
- Extensive experience in staff development, teacher evaluation, and school improvement.
- Extensive experience in supervision of personnel in a variety of capacities.

B. Other combinations of education, experience, or training that may be considered in substitution for the minimum requirements:

C. Preferred education and/or experience:

- Experience as school or district administrator.
- Extensive knowledge of English Language Development.
- Experience implementing teacher evaluation systems and/or performance-based incentives.

- Doctorate degree in Educational Leadership or related field.

D.Knowledge, Skills, and Abilities:

- Knowledge of research methods and techniques used in studying educational programs, including project planning, methodology, reporting, and processes.
- Strong practical and theoretical knowledge of school improvement, performance based compensation systems, curriculum, teacher and professional development.
- Ability to plan, organize and facilitate the application, management, and administration of federal and state entitlements, grants, and other funds.
- Excellent interpersonal, leadership, and communication skills.
- Effective planning, organizational, and time management skills.
- The ability to work well under pressure in a multi-task environment.
- Ability to apply professional knowledge and administrative ability to the specific education project.
- Ability to reason logically and think independently and creatively.
- Computer Literate: Microsoft Word, Excel, PowerPoint, Access, Outlook, Project and Internet Research.
- Knowledge of statutory law, case law, federal regulations and state regulations governing operations of education service agencies in Arizona.

E.Specialized training, certifications, or other special requirements:

- Fingerprint Clearance
- Driver's License

F.Preferred special requirements:

G.Special working conditions:

***Degrees/credits must be from an academically accredited college or university as recognized by the U.S. Department of Education (USDE) or the Council for Higher Education (CHEA)**

MARICOPA COUNTY JOB DESCRIPTION

REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP - EXTEND (REIL-Extend)

DATA SYSTEMS SPECIALIST

MARKET RANGE TITLE:

DEPARTMENT:	**EDUCATION SERVICE AGENCY**
DIVISION/SECTION/UNIT:	**REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP (LOW ORG 3750)**
FLSA STATUS:	**NON - EXEMPT**
CLASSIFIED/UNCLASSIFIED:	**CONTRACT/UNCLASSIFIED**
POSITION NUMBER:	**68817**

PURPOSE STATEMENT:
Responsible for **collecting and analyzing student achievement and educator evaluation data used to calculate the REIL Score** through communication and technical cooperation with partner school districts and the Arizona Department of Education (ADE). Collects and analyzes student achievement and educator evaluation data used to calculate the REIL Score by:

- Collaborating with partner school districts and ADE to collect and ensure data integrity.
- Supporting the design and implementation of a data management system.
- Providing administrative support functions related to data collection and integrity.

PRIMARY INDICATORS/DUTIES:

The Primary Indicators/Descriptors include, but are not limited to:

1.0 <u>Collaborating with Partner School Districts and the Arizona Department of Education to Collect and Ensure Data integrity</u>

1.1 Preparing and maintaining program documentation to meet reporting requirements to the U.S. Department of Education.

1.2 Collaborates with Human Capital Management Administrator, Performance Based Evaluation Administrator, and the Data Management Systems Project Director to collect quantitative and qualitative data.

1.3 Collaborates with the Data Management Systems Project Director to support analysis, collection, storage, creation, and validation of project data needed for inclusion in the data management system.

1.4 Provides technical support to school district personnel, program staff, and ADE staff to access and use project data in a safe, secure, and appropriate manner as dictated by district, county, state, and federal data requirements and agreements (e.g. FERPA).
1.5 Maintains confidentiality as required to effectively support implementation of the program.
1.6 Responds to and contributes to the resolution of data collection, validation, and reporting challenges encountered by school district personnel.

2.0 <u>Supporting the Design and Implementation of a Data Management System</u>

2.1 Collaborates with program staff in the design, development, management, and maintenance of the data visualization environment and reports for the REILize Decision Support System (RDSS).
2.2 Works collaboratively to develop and implement processes to enable users to review, modify, or verify information contained in the data management system throughout the year.
2.3 Employs aggregate reporting and cell suppression methodology to protect the identity and privacy of individuals.
2.4 Uses public information and research-based knowledge of issues and trends to collaboratively work with all stakeholders.

3.0 <u>Providing Administrative Support Functions Related to Data Collection and Integrity</u>

3.1 Supports program staff in the coordination of program activities as they relate to data use and data management systems.
3.2 Researches and compiles background information from partner districts and other sources for the preparation and submission of grant requirements.
3.3 Serves as back-up Help Desk support for the data management system.
3.4 Researches and compiles background information from districts and other sources for the preparation and submission of grant documentation.
3.5 Categorizes and extracts appropriate information from meeting minutes to assist with program goals, objectives, and performance measures.
3.6 Summarizes and prepares analysis of grant activities.

REPORTING STRUCTURE

A. Supervision Received:

- Data Management System Administrator

B. Supervision Exercised:

- None

QUALIFICATIONS*

A. Minimum education and/or experience:

- Undergraduate degree (business, education, social sciences) in a field related to the collection, coordination, and use of qualitative and quantitative data in the implementation of a performance-based management system.

B. Other combinations of education, experience, or training that may be considered in substitution for the minimum requirements:

- Three years of experience related to at least one of the following:
  - School district student information/management systems
  - School district human resource systems

    - School district assessment systems
    - Other school district data systems
  - 2 or more years' experience in the development of a Learning Management System, Content Management/Delivery System, and/or data management system.
  - Demonstrated proficiency in the extraction of data from school district systems .
  - Experience facilitating or participating in course-mapping processes/procedures to assist in the verification of student-teacher linkages that result in performance-based incentives.
- Some college level coursework related to job duties.

C. Preferred education and/or experience:

- Arizona Teacher Certification
- Experience working with statistical analysis programs (e.g., SPSS, Excel)
- Working knowledge of database systems (e.g. MS SQL)
- Experience working in an Arizona school district technology and/or curriculum/assessment department or at a state education agency (e.g., Arizona Department of Education)

D. Knowledge, Skills, and Abilities:

- Ability to collect, compile, and verify the integrity of large volumes of qualitative and quantitative data.
- Proficient in the use of Microsoft Outlook, Word, Excel, PowerPoint, Access, SQL scripts, & Internet.
- Strong working knowledge and ability to collect, manage, report, and coordinate student information within school districts following FERPA requirements.
- Strong working knowledge of ways to legally disseminate student information with officially sanctioned partners, and entities following FERPA requirements.
- Strong working knowledge of data articulation between Student Information Systems.
- Demonstrated ability to provide technical data guidance and support to school district personnel and other stakeholders.
- Demonstrated ability to effectively prioritize multiple tasks and projects under the constraints of strict deadlines and time pressures.
- Ability to determine the source of problems and provide immediate and long-term resolution to problems.
- Ability to travel to MCESA school districts, both local and remote.
- Strong interpersonal, customer service, communication, and telephone skills.
- Evidence of collaborative skills.
- Excellent communication skills (written and oral).
- Evidence of problem solving ability.
- Resourceful and adaptable.
- Willingness to perform up to the highest measure of competence.
- Respected professionally.

E. Specialized training, certifications, or other special requirements:

- Fingerprint Clearance
- Background Clearance
- Driver's License

F. Preferred special requirements:

G. Special working conditions:

***Degrees/credits must be from an academically accredited college or university as recognized by the U.S. Department of Education (USDE) or the Council for Higher Education (CHEA)**

MARICOPA COUNTY JOB DESCRIPTION

REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP - Extend (REIL-Extend)

DATA SYSTEMS SPECIALIST

MARKET RANGE TITLE:	**ADMIN OPERATIONS SPECIALIST**
DEPARTMENT:	**EDUCATION SERVICE AGENCY**
DIVISION/SECTION/UNIT:	**EDUCATIONAL INNOVATION (LOW ORG 3750)**
FLSA STATUS:	**NON - EXEMPT**
CLASSIFIED/UNCLASSIFIED:	**CONTRACT/UNCLASSIFIED**
POSITION NUMBER:	**69705**

PURPOSE STATEMENT:
Responsible for **collecting and analyzing student achievement and educator evaluation data used** through communication and technical cooperation with partner school districts and the Arizona Department of Education (ADE). Collects and analyzes student achievement and educator evaluation data by Collaborating with partner school districts and ADE to collect and ensure data integrity.

- Supporting the design and implementation of a data management system.
- Providing administrative support functions related to data collection and integrity.

PRIMARY INDICATORS/DUTIES:

The Primary Indicators/Descriptors include, but are not limited to:

1.0 <u>Collaborating with Partner School Districts and the Arizona Department of Education to Collect and Ensure Data integrity</u>

1.1 Preparing and maintaining program documentation to meet reporting requirements to the U.S. Department of Education.

1.2 Collaborates with Human Capital Management Administrator, Performance Based Evaluation Administrator, and the Data Management Systems Project Director to collect quantitative and qualitative data.

1.3 Collaborates with the Data Management Systems Project Director to support analysis, collection, storage, creation, and validation of project data needed for inclusion in the data management system.

1.4 Provides technical support to school district personnel, program staff, and ADE staff to access and use project data in a safe, secure, and appropriate manner as dictated by district, county, state, and federal data requirements and agreements (e.g. FERPA).

1.5 Maintains confidentiality as required to effectively support implementation of the program.

1.6 Responds to and contributes to the resolution of data collection, validation, and reporting challenges encountered by school district personnel.

2.0 <u>Supporting the Design and Implementation of a Data Management System</u>

2.1 Collaborates with program staff in the design, development, management, and maintenance of the data visualization environment and reports for the REILize Decision Support System (RDSS).

2.2 Works collaboratively to develop and implement processes to enable users to review, modify, or verify information contained in the data management system throughout the year.

2.3 Employs aggregate reporting and cell suppression methodology to protect the identity and privacy of individuals.

2.4 Uses public information and research-based knowledge of issues and trends to collaboratively work with all stakeholders.

3.0 <u>Providing Administrative Support Functions Related to Data Collection and Integrity</u>

3.1 Supports program staff in the coordination of program activities as they relate to data use and data management systems.

3.2 Researches and compiles background information from partner districts and other sources for the preparation and submission of grant requirements.

3.3 Serves as back-up Help Desk support for the data management system.

3.4 Researches and compiles background information from districts and other sources for the preparation and submission of grant documentation.

3.5 Categorizes and extracts appropriate information from meeting minutes to assist with program goals, objectives, and performance measures.

3.6 Summarizes and prepares analysis of grant activities.

REPORTING STRUCTURE

A. Supervision Received:

- Admin – Educational Technology

B. Supervision Exercised:

- None

QUALIFICATIONS*

A. Minimum education and/or experience:

- Undergraduate degree (business, education, social sciences) in a field related to the collection, coordination, and use of qualitative and quantitative data in the implementation of a performance-based management system.

B. Other combinations of education, experience, or training that may be considered in substitution for the minimum requirements:

- Three years of experience related to at least one of the following:
  - School district student information/management systems
  - School district human resource systems
  - School district assessment systems
  - Other school district data systems
- 2 or more years' experience in the development of a Learning Management System, Content Management/Delivery System, and/or data management system.
- Demonstrated proficiency in the extraction of data from school district systems .
- Experience facilitating or participating in course-mapping processes/procedures to assist in the verification of student-teacher linkages that result in performance-based incentives.
- Some college level coursework related to job duties.

C. Preferred education and/or experience:

- Arizona Teacher Certification
- Experience working with statistical analysis programs (e.g., SPSS, Excel)
- Working knowledge of database systems (e.g. MS SQL)
- Experience working in an Arizona school district technology and/or curriculum/assessment department or at a state education agency (e.g., Arizona Department of Education)

D. Knowledge, Skills, and Abilities:

- Ability to collect, compile, and verify the integrity of large volumes of qualitative and quantitative data.
- Proficient in the use of Microsoft Outlook, Word, Excel, PowerPoint, Access, SQL scripts, & Internet.
- Strong working knowledge and ability to collect, manage, report, and coordinate student information within school districts following FERPA requirements.
- Strong working knowledge of ways to legally disseminate student information with officially sanctioned partners, and entities following FERPA requirements.
- Strong working knowledge of data articulation between Student Information Systems.
- Demonstrated ability to provide technical data guidance and support to school district personnel and other stakeholders.
- Demonstrated ability to effectively prioritize multiple tasks and projects under the constraints of strict deadlines and time pressures.
- Ability to determine the source of problems and provide immediate and long-term resolution to problems.
- Ability to travel to MCESA school districts, both local and remote.
- Strong interpersonal, customer service, communication, and telephone skills.
- Evidence of collaborative skills.
- Excellent communication skills (written and oral).
- Evidence of problem solving ability.
- Resourceful and adaptable.
- Willingness to perform up to the highest measure of competence.
- Respected professionally.

E. Specialized training, certifications, or other special requirements:

- Fingerprint Clearance
- Background Clearance
- Driver's License

F. Preferred special requirements:

G. Special working conditions:

***Degrees/credits must be from an academically accredited college or university as recognized by the U.S. Department of Education (USDE) or the Council for Higher Education (CHEA)**

MARICOPA COUNTY JOB DESCRIPTION

REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP - EXTEND (REIL-Extend)

DATA MANAGEMENT SYSTEM PROJECT LEADER

MARKET RANGE TITLE:	**MANAGEMENT ASSISTANT**
DEPARTMENT:	**EDUCATION SERVICE AGENCY**
DIVISION/SECTION/UNIT:	**REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP (LOW ORG 3750)**
FLSA STATUS:	**NON - EXEMPT**
CLASSIFIED/UNCLASSIFIED:	**CONTRACT/UNCLASSIFIED**
POSITION NUMBER:	**68817**

PURPOSE STATEMENT:
Responsible for **developing and implementing a data management system** to support all goals, objectives, and activities associated with Rewarding Excellence in Instruction and Leadership-Extend (REIL-Extend) program through collaboration with program partners and the Arizona Department of Education. Develops and implements a data management system by:

- Articulating a vision and implementation strategy for a data management system.
- Collaborating with program partners to create a data collection, analysis, and dissemination plan.
- Communicating across partner districts the requirements and specifications needed to populate the data management system.

PRIMARY INDICATORS/DUTIES:

The Primary Indicators/Descriptors include, but are not limited to:

1.0 <u>Articulating a Vision and Implementation Strategy for a Data Management System</u>

1.1 Supports the program with implementing strategic plans aligned with program goals, objectives, and activities.

1.2 Ensures all interactions, both written and verbal, are aligned to the REIL-Extend program.

1.3 Designs a project management plan that outlines the completion of the data management system within the program constraints.

1.4 Represents the interests of the program when engaging with local, state, national, and government groups and agencies, including consultation with school district personnel, Maricopa County Education Service Agency (MCESA) staff, and Arizona Department of Education (ADE) staff to refine ongoing data collection processes and data visualization reporting, interpretation, and utilization needs relative to the REILize Decision Support System (RDSS).

1.5 Ensures that the procedures comply with local, state, and federal regulation and policies, including FERPA (Family Educational Rights and Privacy Acts).

2.0 <u>Collaborating with Program Partners to Create a Data Collection, Analysis, and Dissemination Plan</u>

2.1 Participates in cross-district transition teams to understand the needs of the districts.

2.2 Creates plans to meet both the needs of the school districts and the program requirements.

2.3 Collaborates with the Communications Coordinator to create communications documents in relation to data collection and dissemination.

3.0 <u>Communicating Across Partner Districts the Requirements and Specification Needed to Populate the Data Management System</u>

3.1 Works to support analysis, collection, storage, creation, and validation of project data needed for inclusion in the data management system.

3.2 Collaborates with program staff in the design, development, management, and maintenance of the data visualization environment and reports for the data management system.

3.3 Provides technical support and training to other program personnel and partnering school districts for the purpose of completing projects and requests efficiently.

3.4 Provides training and support to school district personnel and MCESA staff on the use of the RDSS through a variety of media choices and delivery options.

REPORTING STRUCTURE

A. Supervision Received:

- REIL-Extend Program Director

B. Supervision Exercised:

- Data Systems Specialist

QUALIFICATIONS*

A. Minimum education and/or experience:

- Undergraduate degree (business, education, social sciences) in a field related to the collection, coordination, and use of qualitative and quantitative data in the implementation of a performance-based management system.

B. Other combinations of education, experience, or training that may be considered in substitution for the minimum requirements:

- Three years of experience related to at least one of the following:
  - School district student information/management systems
  - School district human resource systems
  - School district assessment systems
  - Other school district data systems

- 2 or more years' experience in the development of a Learning Management System, Content Management/Delivery System, and/or data management system.
- Demonstrated proficiency in the extraction of data from school district systems.
- Experience facilitating or participating in course-mapping processes/procedures to assist in the verification of student-teacher linkages that result in performance-based incentives.

- Some college level coursework related to job duties.

C. Preferred education and/or experience:

- Arizona Teacher Certification
- Experience working with statistical analysis programs (e.g., SPSS, Excel)
- Working knowledge of database systems (e.g. MS SQL).

- Experience working in an Arizona school district technology and/or curriculum/assessment department or at a state education agency (e.g., Arizona Department of Education).

D. Knowledge, Skills, and Abilities:

- Ability to collect, compile, and verify the integrity of large volumes of qualitative and quantitative data.
- Proficient in the use of Microsoft Outlook, Word, Excel, PowerPoint, Access, SQL scripts, & Internet.
- Strong working knowledge and ability to collect, manage, report, and coordinate student information within school districts following FERPA requirements.
- Strong working knowledge of ways to legally disseminate student information with officially sanctioned partners and entities following FERPA requirements.
- Strong working knowledge of data articulation between Student Information Systems.
- Demonstrated ability to provide technical data guidance and support to school district personnel and other stakeholders.
- Demonstrated ability to effectively prioritize multiple tasks and projects under the constraints of strict deadlines and time pressures.
- Ability to determine the source of problems and provide immediate and long-term resolution to problems.
- Ability to travel to MCESA school districts, both local and remote.
- Strong interpersonal, customer service, communication, and telephone skills.
- Evidence of collaborative skills.
- Excellent communication skills (written and oral).
- Evidence of problem solving ability.
- Resourceful and adaptable.
- Willingness to perform up to the highest measure of competence.
- Respected professionally.

E. Specialized training, certifications, or other special requirements:

- Fingerprint Clearance
- Background Clearance
- Driver's License

F. Preferred special requirements:

G. Special working conditions:

***Degrees/credits must be from an academically accredited college or university as recognized by the U.S. Department of Education (USDE) or the Council for Higher Education (CHEA)**

MARICOPA COUNTY JOB DESCRIPTION

REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP - Extend (REIL-Extend)

DATA COORDINATOR

MARKET RANGE TITLE:	**MANAGEMENT ASSISTANT**
DEPARTMENT:	**EDUCATION SERVICE AGENCY**
DIVISION/SECTION/UNIT:	**REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP (LOW ORG 3750)**
FLSA STATUS:	**NON - EXEMPT**
CLASSIFIED/UNCLASSIFIED:	**CONTRACT/UNCLASSIFIED**
POSITION NUMBER:	**68817**

PURPOSE STATEMENT:
The *Rewarding Excellence in Instruction and Leadership-Extend* (REIL-Extend) program Data Coordinator works collaboratively with program staff, school district personnel, and the Arizona Department of Education to ensure successful implementation of the REIL-Extend program, including the development and implementation of the REILize Decision Support System (RDSS). The Data Coordinator:

- Assists with data collection, analysis, and dissemination of communication.
- Works collaboratively with the REIL-Extend Management Team, the Arizona Department of Education (ADE) and school districts to design, implement, and support a program strategy that will result in an integrated RDSS.
- Works collaboratively with the REIL-Extend Management Team, Arizona Department of Education, and alliance school districts to gather data from disparate school district data systems into an integrated RDSS.
- Provides administrative support functions related to data collection, data integrity, software/application development, and REIL-Extend program communication.

PRIMARY INDICATORS/DUTIES:

The Primary Indicators/Descriptors include, but are not limited to:

1.0 <u>Vision & Strategic Leadership</u> *<u>(MCESA Standards 1 & 2)</u>*

1.1 Supports the REIL-Extend program with implementing strategic plans aligned with grant requirements and MCESA's vision, mission, and goals.

1.2 Ensures all interactions, both written and verbal, are aligned to the REIL-Extend program and the MCESA's vision.

1.3 Assists REIL-Extend program personnel and alliance districts in the use of technology to make data-driven decisions.

2.0 <u>Management</u> *<u>(MCESA Standard 3)</u>*

2.1 Participates and assists in the administration of REIL-Extend program functions and activities.

2.2 Assists REIL-Extend Program Administrator in the preparation and maintenance of program documentation to meet REIL-Extend Grant reporting requirements to the U.S. Department of Education, including frequent sweeps and upkeep of share-drives and SharePoint resources.

2.3 Manages quantitative and qualitative data collection activities in collaboration with REIL-Extend personnel in order to support REIL-Extend program implementation.

2.4 Serves as a technical advisor on FERPA (Family Educational Rights and Privacy Acts) regulations.

3.0 <u>Relationships, Collaboration, & Communication</u> *<u>(MCESA Standard 4 & 7)</u>*

3.1 Works with REIL-Extend Data Management System Project Director to support analysis, collection, storage, creation, and validation of project data needed for inclusion in the REILize Decision Support System (RDSS).

3.2 Collaborates with REIL-Extend /Educational Innovations program personnel in the design, development, management, and maintenance of the data visualization environment and reports for the RDSS.

3.3 Keeps abreast of updates and changes to district data system changes through frequent communication with district staff responsible for providing district data needed for the RDSS.

3.4 Works collaboratively to develop and implement processes to enable users to review, modify, or verify information contained in the RDSS throughout the year.

3.5 Employs aggregate reporting and cell suppression methodology to protect the identity and privacy of individuals.

3.6 Uses public information and research-based knowledge of issues and trends to collaboratively work with all stakeholders.

3.7 Categorizes and extracts appropriate information from meeting minutes to assist with REIL-Extend program goals, objectives, and performance measures.

3.8 Provides backup to other service areas as needed, and other duties as assigned by the REIL-Extend Program Administrator.

3.9 Attends meetings as assigned for the purpose of conveying and/or gathering information required to perform functions.

3.10 Researches and compiles background information from districts and other sources for the preparation and submission of grant documentation.

3.11 Develops and maintains appropriate documentation of REIL-Extend activities, policies, and progress; collaborates in the development of project reports, updates, and presentations to stakeholder audiences as required

3.12 Assists in the review and preparation of appropriate content updates for the REIL-Extend website.

3.13 Produces written communication that is clear, correct, and appropriate to the audience.

3.14 Promotes shared responsibility, teamwork, and continuous improvement.

3.15 Establishes, nurtures, and maintains good relationships with all internal and external stakeholders.

4.0 **Competence & Integrity** *(MCESA Standard 5)*

4.1 Supports REIL-EXTEND staff in the coordination of REIL-Extend program activities as they relate to data use and data management systems.

4.2 Provides technical support to school district personnel, REIL-Extend staff, and ADE staff to access and use project data in a safe, secure, and appropriate manner as dictated by district, county, state, and federal data requirements and agreements (e.g. FERPA).

4.3 Responds to and contributes to the resolution of data collection, validation, and reporting challenges encountered by school district personnel.

4.4 Researches and compiles background information from REIL-Extend districts and other sources for the preparation and submission of grant requirements.

4.5 Researches and compiles formative and summative data from REIL-Extend districts and other sources for communication and monitoring of program progress.

4.6 Maintains confidentiality as required to effectively support implementation of the REIL-Extend program.

4.7 Establishes and maintains procedures to protect the rights of students and staff and adhere to policies, and laws.

4.8 Demonstrates sensitivity and cultural proficiency when interacting with all stakeholders.

4.9 Actively participates in REIL-Extend team professional development opportunities, reads current research and literature, and attends key meetings to ensure expertise relative to scope of work.

4.10 Serves as back-up Help Desk support for the RDSS.

5.0 **Political & Social Context** *(MCESA Standard 6)*

5.1 Supports policies and procedures of MCESA in alignment with the vision, mission, and goals.

5.2 Represents the interests of the MCESA/REIL-Extend system when engaging with local, state, national, and government groups and agencies, including consultation with school district personnel, MCESA staff, and Arizona Department of Education (ADE) staff to refine ongoing data collection processes and data visualization reporting, interpretation, and utilization needs relative to the RDSS.

5.3 Ensures that REIL-Extend programs and procedures comply with local, state, and federal regulation and policies, including FERPA (Family Educational Rights and Privacy Acts).

6.0 **Professional Growth** *(MCESA Standard 8)*

6.1 Demonstrates personal responsibility for professional learning in support of agency vision, mission, and goals.

6.2 Actively participates in formative and summative evaluation of performance and solicits feedback from others.

6.3 Facilitates, in collaboration with REIL-Extend Field Specialists and other program staff, professional development for teachers and principals on value-added model, and how to use data to inform and improve instruction.
6.4 Provides training and creates materials for delivery of professional development related to REIL-Extend program goals and objectives.
6.5 Provides technical support and training to other program personnel and partnering school districts for the purpose of completing projects and requests efficiently.
6.6 Provides training and support to school district personnel and MCESA staff on the use of the RDSS through a variety of media choices and delivery options.

7.0 Attention to Results *(MCESA Standard 9)*

7.1 Ensures a consistent and continuous focus on results, using system and school data to monitor progress, and provide support.
7.2 Develops and communicates a coherent, understandable and accurate accounting of performance results to stakeholder groups.
7.3 Follows up on REIL-Extend program and MCESA assignments to determine progress or the extent of completion.
7.4 Summarizes and prepares analysis of grant activities.

REPORTING STRUCTURE

A. Supervision Received:

- Administrator for Research and Evaluation

B. Supervision Exercised:

- None

QUALIFICATIONS*

A. Minimum education and/or experience:

- Undergraduate degree (business, education, social sciences) in a field related to the collection, coordination, and use of qualitative and quantitative data in the implementation of a performance-based management system.

B. Other combinations of education, experience, or training that may be considered in substitution for the minimum requirements:

- Three years of experience related to at least one of the following:
  - School district student information/management systems
  - School district human resource systems
  - School district assessment systems
  - Other school district data systems
- 2 or more years' experience in the development of a Learning Management System, Content Management/Delivery System, and/or data management system.
- Demonstrated proficiency in the extraction of data from school district systems
- Experience facilitating or participating in course-mapping processes/procedures to assist in the verification of student-teacher linkages that result in performance-based incentives

- Some college level coursework related to job duties

C. Preferred education and/or experience:

- Arizona Teacher Certification
- Experience working with statistical analysis programs (e.g., SPSS, Excel)
- Working knowledge of database systems (e.g. MS SQL)

- Experience working in an Arizona school district technology and/or curriculum/assessment department or at a state education agency (e.g., Arizona Department of Education)

D. Knowledge, Skills, and Abilities:

- Ability to collect, compile, and verify the integrity of large volumes of qualitative and quantitative data.
- Proficient in the use of Microsoft Outlook, Word, Excel, PowerPoint, Access, SQL scripts, & Internet.
- Strong working knowledge and ability to collect, manage, report, and coordinate student information within school districts following FERPA requirements.
- Strong working knowledge of ways to legally disseminate student information with officially sanctioned partners, and entities following FERPA requirements.
- Strong working knowledge of data articulation between Student Information Systems.
- Demonstrated ability to provide technical data guidance and support to school district personnel and other stakeholders.
- Demonstrated ability to effectively prioritize multiple tasks and projects under the constraints of strict deadlines and time pressures.
- Ability to determine the source of problems and provide immediate and long-term resolution to problems.
- Ability to travel to MCESA school districts, both local and remote.
- Strong interpersonal, customer service, communication, and telephone skills.
- Evidence of collaborative skills.
- Excellent communication skills (written and oral).
- Evidence of problem solving ability.
- Resourceful and adaptable.
- Willingness to perform up to the highest measure of competence.
- Respected professionally.

E. Specialized training, certifications, or other special requirements:

- Fingerprint Clearance
- Background Clearance
- Driver’s License

F. Preferred special requirements:

G. Special working conditions:

***Degrees/credits must be from an academically accredited college or university as recognized by the U.S. Department of Education (USDE) or the Council for Higher Education (CHEA)**

MARICOPA COUNTY JOB DESCRIPTION

REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP - EXTEND (REIL-Extend)

ASSESSMENT COORDINATOR

MARKET RANGE TITLE:	**EDUCATION SERVICE PROGRAM COORDINATOR**
DEPARTMENT:	**EDUCATION SERVICE AGENCY**
DIVISION/SECTION/UNIT:	**EDUCATION INNOVATION (3750)**
FLSA STATUS:	**EXEMPT**
CLASSIFIED/UNCLASSIFIED:	**UNCLASSIFIED/CONTRACT**
Position Number:	**68403**

PURPOSE STATEMENT:
Responsible for **developing valid and reliable assessments for secure and non-secure interim assessments** through the facilitation of assessment development committees.
Develops valid and reliable assessments for secure and non-secure interim assessments by:

- Facilitating assessment development and procurement.
- Developing district capacity to design valid and reliable assessments.
- Evaluating assessment items for validity and reliability.

PRIMARY INDICATORS DUTIES:

The Primary Indicators/Descriptors include, but are not limited to:

1.0 <u>Facilitating Assessment Development and Procurement</u>

1.1 Facilitates the development assessment items for use in secure non-state-tested subject area assessments; and non-secure items in all subject areas for the development of local school common assessments or district interim assessments.

1.2 Procures and evaluates vendor services to develop assessments.

1.3 Develops and maintains systems documents outlining the persons responsible, the tasks and the time lines associated with core assessment department project management. Continually revises these documents as necessary to accurately reflect the processes currently in operation or development.

1.4 Collects artifacts for use as anchor assessment responses.

1.5 Plans the use of assessment instruments that use technology to assist in the reporting and analysis of results, including disaggregation of subgroup achievement data.

2.0 <u>Developing District Capacity to Design Valid and Reliable Assessments</u>

2.1 Collaborates with principals and teacher leaders to design performance rubrics aligned with curriculum.

2.2 Evaluates district assessments for alignment of content and rigor to Arizona State Content Standards.

2.3 Develops internal capacity of schools and districts to design test blueprints to monitor the academic progress and learning needs of students.

3.0 **Evaluating Assessment Items for Validity and Reliability**

3.1 Acts as the County liaison with the Arizona Department of Education to ensure compliance with assessment provisions of federal and state legislation.

3.2 Develops and maintains liaisons and active participation with educational leaders in assessment and school improvement at state, regional, and national levels.

3.3 Collects and analyzes data to ensure development of assessment items meets strict guidelines for validity and reliability.

REPORTING STRUCTURE

A. Supervision Received:

- Standards and Assessment Administrator

B. Supervision Exercised:

- N/A

QUALIFICATIONS*

A. Minimum education and/or experience:

- Bachelor's degree in education or psychology; three years experience as a test-item writer in a K-12 organization.

B. Other combinations of education, experience, or training that may be considered in substitution for the minimum requirements:'

- Knowledge of writing performance-based assessment items and rubrics, especially selected-response items with multiple levels of feedback.

C. Preferred education and/or experience:

- Master's degree, preferred concentrations: educational psychology, educational assessment, measurement and testing, curriculum and instruction, instructional design.

D. Knowledge, Skills, and Abilities:

- Core Standard knowledge in multiple content areas; ability to evaluate alignment of assessment items to Core Standard; experience writing and reviewing a high volume and high variety of robust assessment items; Group facilitation skills to generate assessment products; Knowledge of creating training and documentation around writing performance-based assessment items and rubrics, especially selected-response items with multiple levels of feedback.

E. Specialized training, certifications, or other special requirements:

- Remains knowledgeable of all State accountability initiatives for the purpose of participating in state and local accountability workshops and committees. *****Candidate may be asked to provide writing samples and test-item samples.*****
- Fingerprint clearance card

F. Preferred special requirements:

- Ability to articulate a solid understanding of measurement and psychometrics related to norm and criterion referenced testing; alternate assessment item development; and alignment to grade-level standards; innovative computer-based item development.

G. Special working conditions:

- Works with the Director of Research and Evaluation and staff for the purpose of designing and validating assessment items and for the purpose of creating and delivering reports and analysis of testing results.

*Degrees/credits must be from an academically accredited college or university as recognized by the U.S. Department of Education (USDE) or the Council for Higher Education (CHEA)

MARICOPA COUNTY JOB DESCRIPTION

REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP - Extend (REIL-Extend)

ASSESSMENT COORDINATOR

MARKET RANGE TITLE:	**EDUCATION SERVICE PROGRAM COORDINATOR**
DEPARTMENT:	**EDUCATION SERVICE AGENCY**
DIVISION/SECTION/UNIT:	**EDUCATION INNOVATION (3750)**
FLSA STATUS:	**EXEMPT**
CLASSIFIED/UNCLASSIFIED:	**UNCLASSIFIED/CONTRACT**
Position Number:	**75066**

PURPOSE STATEMENT
The purpose of the Assessment Coordinator is to provide facilitation of assessment development committees to develop valid and reliable assessments for secure and non-secure interim assessments (district benchmark or common assessments) and measures of student growth for teacher and principal evaluation (ARS 15-203).

- Facilitating assessment development and procurement.
- Enlisting and communicating with MCESA partners
- Develop capacity to design valid and reliable assessments

PRIMARY INDICATORS DUTIES:
This job may include the following job duties and is not an all-inclusive list of all job duties that may be required. Employees will be required to perform other related duties as assigned.

<u>FACILITATING ASSESSMENT DEVELOPMENT AND PROCUREMENT</u> STANDARD 3

- Maintains database of teachers and leaders who participated in events by content, project, district, grade-level, and date.
- Facilitates the development of assessment items for use in secure non-state-tested subject area assessments; and non-secure items in all subject areas for the development of local school common assessments or district interim assessments.
- Coordinates and facilitates item writing projects and events.
- Collaborates with district and teacher leaders to design performance rubrics aligned with curriculum standards.
- Procures and evaluates vendor services to develop or administer assessments.
- Develops and maintains systems documents outlining the persons responsible, the tasks, and the timelines associated with core assessment department project management.
- Continually revises these documents as necessary to accurately reflect the processes

currently in operation or development.

- Evaluates district assessments for alignment of content and rigor to Arizona State Content Standards.
- Collects artifacts for use as anchor assessment responses.

ENLISTING AND COMMUNICATING WITH MCESA PARTNERS STANDARDS 4, 6,7

- Recruits teachers and district leaders for assessment development projects.
- Enlists, facilitates, and collaborates effectively with MCESA dynamic teams to build assessment capacity.
- Procures and evaluates vendor services to develop assessments.
- Enlists district and charter school collaboration through assessment development training, collaboration projects and events, and assessment development projects and events.
- Acts as the County liaison with the Arizona Department of Education to ensure compliance with assessment provisions of federal and state legislation.
- Develops and maintains liaisons and active participation with educational leaders in assessment and school improvement at state, regional, and national levels.

DEVELOPING CAPACITY TO DESIGN VALID AND RELIABLE ASSESSMENTS
STANDARD 8

- Collaborates with schools and districts to design test blueprints to monitor the academic progress and learning needs of students.
- Plans the use of assessment instruments that use technology to assist in the reporting and analysis of results, including disaggregation of subgroup achievement data.
- Collaborates with Director of Research and Evaluation to ensure development of assessment items meets strict guidelines for validity and reliability.

REPORTING STRUCTURE

A. Supervision Received:
- Administrator for Standards and Assessment

B. Supervision Exercised:
- N/A

QUALIFICATIONS*

A. Minimum education and/or experience:
- Bachelor's degree in education or psychology;
- Three-years of experience in education or experience developing, editing, and/or monitoring assessment delivery and analysis

B. Other combinations of education, experience, or training that may be considered in substitution for the minimum requirements:'
- Knowledge of assessment development process, writing assessment items, developing blueprints, editing items, and rubrics,

C. Preferred education and/or experience:

- Master's degree, preferred concentrations: educational psychology, educational assessment, measurement and testing, curriculum and instruction, instructional design.

D. Knowledge, Skills, and Abilities:

- Core Standard knowledge in multiple content areas; ability to evaluate alignment of assessment items to Core Standard; experience writing and reviewing a high volume and high variety of robust assessment items; Group facilitation skills to generate assessment products; Knowledge of creating training and documentation around writing performance-based assessment items and rubrics, especially selected-response items with multiple levels of feedback.

E. Specialized training, certifications, or other special requirements:

- Remains knowledgeable of all State accountability initiatives for the purpose of participating in state and local accountability workshops and committees. *****Candidate may be asked to provide writing samples and test-item samples.*****
- Fingerprint clearance card

F. Preferred special requirements:

- Ability to articulate a solid understanding of measurement and psychometrics related to norm and criterion referenced testing; alternate assessment item development; and alignment to grade-level standards; innovative computer-based item development.

G. Special working conditions:

- Works with the Director of Research and Evaluation and staff for the purpose of designing and validating assessment items and for the purpose of creating and delivering reports and analysis of testing results.
- Travel to and from schools delivering workshops, monitoring field tests, and recruiting participation in assessment development.

*Degrees/credits must be from an academically accredited college or university as recognized by the U.S. Department of Education (USDE) or the Council for Higher Education (CHEA)

MARICOPA COUNTY JOB DESCRIPTION

REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP - EXTEND (REIL-Extend)

Assessment Administrator

MARKET RANGE TITLE:	**EDUCATION PROGRAM MANAGER**
DEPARTMENT:	**EDUCATION SERVICE AGENCY**
DIVISION/SECTION/UNIT:	**TEACHING AND LEARNING (LOW ORG 3750)**
FLSA STATUS:	**EXEMPT**
CLASSIFIED/UNCLASSIFIED:	**UNCLASSIFIED/REGULAR**
POSITION NUMBER:	**68433**

PURPOSE STATEMENT:
Provides leadership and management of assessment systems targeting identified standards for increased student achievement and measures of educator effectiveness. Responsible for the design, field test, delivery, and implementation of student assessment for all content areas supported by MCESA. Further, the administrator is responsible for developing the capacity of MCESA standards, assessment, and instructional staff in the analysis and use of assessments to improve achievement.

- Provides leadership for the design, development, and implementation of assessment resources.
- Provides leadership for the development and implementation of professional development training and support services to design and implement assessments.
- Develops/procures assessment items to design assessments for all non-tested content areas for use as measures of academic progress in teacher evaluation systems and district or school program evaluation**.**

PRIMARY INDICATORS/DUTIES:
The Primary Indicators/Descriptors include, but are not limited to the following:

1.0 **Provides leadership for the design, development, and implementation of assessment resources.**
   1.1 Researches current assessment best practices, federal initiatives, and alliance opportunities.

1.2 Coordinates with Arizona Department of Education and other state and federal government and non-profit entities to ensure cohesive alignment of MCESA assessment resources and services.
1.3 Provides leadership for regional support and services for implementation of MCESA assessments.
1.4 Establishes project management and internal/external communication systems to inform all stakeholders and ensure effective and efficient development of assessment products and services.
1.5 Leads a curriculum assessment council of LEAs to participate in the development, implementation, and analysis of MCESA assessments.
1.6 Supervises the Assessment Coordinator and maintains responsibility for the development of high quality, assessment resources.
1.7 Works collaboratively with the Research and Evaluation Administrator, Director of Communications, and Administrator for Standards and Assessment.
1.8 Participates in decisions regarding use of student achievement data for teacher evaluation and program improvement.
1.9 Provides technical assistance to MCESA staff regarding the use of student achievement data for educator evaluations.
1.10 Supports MCESA leadership in liaison communication with contracted vendors utilizing data from assessments.

2.0 Provides leadership for the development and implementation of professional development training and support services to design and implement assessments.

2.1 Trains MCESA staff and REIL-Extend alliance LEA partners in the development and use of criterion-referenced, formative, and/or summative assessments for improving student achievement.
2.2 Trains staff and REIL-Extend alliance LEA partners in the interpretation and use of assessment data, including item analysis, item response theory, analysis of variance, categorical growth, and value-added outcomes.
2.3 Supervises the development of trainer-of-trainer modules or on-line resources to support REIL-Extend partner LEAs.
2.4 Collaborates with Standards team on the design and delivery of assessment professional development

3.0 Develops/procures assessment items to design assessments for all non-tested content areas for use as measures of academic progress in teacher evaluation systems and district or school program evaluation.

3.1 Researches and recommends assessments developed by other organizations, consortiums, state or county entities, and/or for profit companies for alignment to identified County assessment needs, budget allowances for one-time and ongoing costs, and contracts/agreements.
3.2 Establishes a comprehensive plan for assessment systems in REIL-Extend alliance districts.
3.3 Assumes responsibility for the development and implementation of student assessment that informs teacher practice and promotes increased student achievement.

3.4 Reviews and approves assessment blueprints, item-specifications, test specifications, field test sampling designs, and assessment items, test maps, and test forms.

3.5 Ensures all assessment items/assessments are constructed with valid alignment to AZ Content Standards and all test blueprints are constructed with appropriate weighting of essential standards, sufficient number of items for reliability, and reasonable student completion time frames.

3.6 Ensures all assessment items/assessments are field tested to demonstrate reliability.

3.7 Collaborates with REIL-Extend Project Directors to coordinate Alliance districts participation and feedback for MCESA assessments.

3.8 Coordinates with MCESA data team to refine assessment data system with links to curricular resources and upload assessment items complete with domain, sub-domain, and other standards identifying information, blueprints, answer keys, teacher and student instructions into assessment management system.

REPORTING STRUCTURE

A. Supervision Received:

- Assistant Superintendent for Education Innovation

B. Supervision Exercised:

- Assessment Coordinators

QUALIFICATIONS*

A. Minimum education and/or experience:

- Assessment development leadership experience in multiple content areas
- Experience with program evaluation and use of psychometric analyses
- Experience implementing and managing assessment data systems
- A Masters degree in relevant fields to educational research or statistics
- Administrative experience in research and assessment

B. Other combinations of education, experience, or training that may be considered in substitution for the minimum requirements:

C. Preferred education and/or experience:

- Experience supervising assessment and data teams
- Doctorate

D. Knowledge, Skills, and Abilities:

- Knowledge of research methods and techniques used in studying educational programs, including project planning, methodology, reporting, and processes.
- Knowledge of statistical methods, test development and scoring, item response theory, equating, and scaling.
- Ability to work with mathematical concepts such as probability and statistical inference.
- Ability to write technical manuals, test administration manuals, and journal articles documenting assessment design and testing

- Excellent interpersonal, leadership, and communication skills.
- Effective planning, organizational, and time management skills.
- The ability to work well under pressure in a multi-task environment.
- Ability to apply professional knowledge and administrative ability to the specific education project.
- Ability to reason logically and think independently and creatively on educational projects.
- Computer Literate: Microsoft Word, Excel, PowerPoint, SPSS and other statistical software, Outlook, Project and Internet Research.

E. Specialized training, certifications, or other special requirements:

- Fingerprint Clearance
- Driver's License

F. Preferred special requirements:

G. Special working conditions:

*Degrees/credits must be from an academically accredited college or university as recognized by the U.S. Department of Education (USDE) or the Council for Higher Education (CHEA).

MARICOPA COUNTY JOB DESCRIPTION

REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP - EXTEND (REIL-Extend)

ADMINISTRATIVE ASSISTANT (PROGRAM DIRECTOR)

MARKET RANGE TITLE:	**OFFICE ASSISTANT SPECIALIZED**
DEPARTMENT:	**EDUCATION SERVICE AGENCY**
DIVISION/SECTION/UNIT:	**EDUCATION INNOVATION (LOW ORG 3750)**
FLSA STATUS:	**NON - EXEMPT**
CLASSIFIED/UNCLASSIFIED:	**UNCLASSIFIED/CONTRACT**
POSITION NUMBER:	**75073**

PURPOSE STATEMENT

Responsible for assisting in the coordination of duties for the Rewarding Excellence in Instruction and Leadership: The Next Generation (REIL-Extend) Program Director in support of the program's goals, objectives, and activities. Supports the day-to-day operations and maintains effective communication for the Program Director.

PRIMARY INDICATORS/DUTIES:

The Primary Indicators/Descriptors include, but are not limited to:

1. **Vision & Strategic Leadership**
   - 1.1. Supports the REIL-Extend program with implementing strategic plans aligned with program requirements and Maricopa County Education Service Agency's (MCESA) vision, mission, and goals.
   - 1.2. Ensures all interactions both written and verbal are aligned to the REIL-Extend program and the agency's vision.

2. **Management**
   - 2.1. Participates and assists in the administration of program functions and activities.
   - 2.2. Prepares and processes purchase requisitions per county procurement.
   - 2.3. Assists in budget preparation and monitoring.
   - 2.4. Makes travel arrangements for the REIL-Extend program team, including hotel accommodations, airline tickets, conference registrations, car rentals, itineraries and maps.
   - 2.5. Establishes, organizes and maintains paper and computerized filing systems.
   - 2.6. Creates and maintains records, files, and associated correspondence in accordance with records retention requirements.
   - 2.7. Supports the Program Director in the preparation of REIL-Extend Grant reporting requirements to the U.S. Department of Education.
   - 2.8. Arranges meetings for REIL-Extend Grant and MCESA staff, including facility scheduling and preparation of calendars, notices, agendas, and materials.

2.9. Maintains electronic calendar for Program Director including the scheduling of appointments, meetings, and other special events.

3. <u>Relationships, Collaboration, & Communication</u>

3.1. Responds to telephone inquiries and directs inquiries to the appropriate staff member.
3.2. Coordinates activities with other County departments, the general public, and outside agencies.
3.3. Arranges meetings, conferences and civic functions as requested.
3.4. Maintains meeting minutes of REIL-Extend Program and MCESA meetings.
3.5. Maintains staff calendar with REIL-Extend program staff events.
3.6. Reviews, prepares, and recommends content updates for the REIL-Extend website.
3.7. Promotes shared responsibility, teamwork, and continuous improvement.
3.8. Provides backup to other service areas as needed, and other duties as assigned by the Program Director.

4. <u>Competence & Integrity</u>

4.1. Supports the Program Director in the coordination of the REIL-Extend program activities. Visually verifies and reviews REIL-Extend program materials for accuracy and completeness.
4.2. Composes routine correspondence; answers, researches, and responds to questions and inquiries pertaining to the REIL-Extend program and MCESA (e.g., to/from Superintendents, other district/school personnel, other agencies, consultants, and vendors).
4.3. Researches and compiles background information from districts and other sources for the preparation and submission of grant applications.
4.4. Maintains confidentiality as required to effectively support the Program Director.

5. **<u>Political & Social Context</u>**

5.1. Supports policies and procedures of MCESA in alignment with the vision, mission, and goals.

6. **<u>Professional Growth</u>**

6.1. Demonstrates personal responsibility for professional learning in support of agency vision, mission, and goals.
6.2. Actively participates in formative and summative evaluation of performance and solicits feedback from others.

7. <u>Attention to Results</u>

7.1. Follows up on REIL-Extend program and MCESA assignments to determine progress or the extent of completion.
7.2. Summarizes and prepares analysis of grant activities.

REPORTING STRUCTURE

A. Supervision Received:

- REIL-Extend Program Director

B. Supervision Exercised:

- None

QUALIFICATIONS*

A. Minimum education and/or experience:

- High School Diploma or GED and two years of advanced clerical or administrative experience.

B. Other combinations of education, experience, or training that may be considered in substitution for the minimum requirements:

- An equivalent combination of education and job-related experience may be substituted for requirements.

C. Preferred education and/or experience:

- Bachelor's degree.
- Experience with Federal and State grant programs.

D. Knowledge, Skills, and Abilities:

- Strong interpersonal, customer service, written and verbal communication, and telephone skills.
- Ability to create professional written communications for a wide variety of purposes and audiences.
- Ability to coordinate programs and work well under pressure in a multi-task environment.
- Advanced clerical and organizational skills.
- Computer Literate: Microsoft Word, Excel, Outlook, PowerPoint, Publisher, Access & Internet.
- Knowledge of web-based research methods and techniques.
- Knowledge of basic governmental procurement practices.
- Ability to collect and compile qualitative and quantitative data.

E. Specialized training, certifications, or other special requirements:

- Arizona Driver's License

F. Preferred special requirements:

G. Special working conditions:

*Degrees/credits must be from an academically accredited college or university as recognized by
The U.S. Department of Education (USDE) or the Council for Higher Education (CHEA)

Policies

Ensuring Equitable Access to Excellent Educators in Arizona

Submitted to United States Department of Education

October 7, 2015

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Section 1: Introduction

The mission statement of the Arizona Department of Education (ADE) is, "To serve Arizona's education community, and actively engage parents, to ensure every student has access to an excellent education."[1] Such a mission calls for all Arizona children to receive the high-quality education they deserve and requires access to effective teachers along with school and district leadership that is focused on improving student achievement. ADE recognizes that Arizona's educators are the most important school-related component of success for Arizona's students and is committed to the goal that students of color, students in economically disadvantaged areas and students with special needs are not taught by inexperienced or ineffective educators at higher rates than students outside those demographics. ADE further recognizes that leadership is an equally important component of a quality education and also seeks to meet a goal that schools with students in the previously mentioned underserved populations are not led by unqualified or ineffective administrators.

Arizona is home to 1,116,143 students in 2,121 charter and district schools. There are 255 school districts and 618 charter holders in a K-12 system that employs more than 60,000 teachers. Arizona is geographically the sixth largest state and is divided into fifteen counties. Of those fifteen counties, two are predominately urban, while the remaining thirteen counties contain many rural and Native American communities. According to the U.S. Census Bureau, the median household income is nearly $4,000 below the national median at $49,774 and the poverty rate is 2.5% greater than the national average at 17.9%. Of the state's total population:

- 24.4% are under age 18 (28% of those are in low-income families)
- 42.2% are racial or ethnic minorities
- 26.8% have a home language other than English[2]
- 58% of Latinos (Arizona's largest minority demographic) live in poverty.[3]

In 2006, ADE submitted to the US Department of Education (USED) a report detailing its Equity Plan for Highly Qualified Teachers in response to requirements of the 2002 reauthorization of the Elementary and Secondary Education Act (ESEA), known as No Child Left Behind.

The conversation among Arizona educators and policy makers has shifted from ensuring students are taught by highly qualified educators to highly effective ones. This follows a national trend of using data and performance measures to define quality instruction that correlates to increases in student achievement. During school year 2014-15, ADE set in motion

[1] Arizona Department of Education, Strategic Plan, FY 2015-2016 (proposed)
[2] United States Census Bureau (*Arizona QuickFacts 2013*)
[3] National Center for Children in Poverty

a process to review and address the long-term needs for improving equitable access to effective and highly effective teachers and leaders. This revised plan is in response to the July 7, 2014 letter from U.S. Secretary of Education Arne Duncan in order to comply with Section 1111(b)(8)(C) of the ESEA.

Arizona values local control and current statutes allow for districts to develop their own definition and measurement of "effective" and "highly effective" educators with guidance from ADE.[4] The *Arizona Framework for Measuring Educator Effectiveness* recommends defining "Highly Effective" as, "…consistently exceeds expectations. (This) teacher's students generally made exceptional levels of academic progress. The highly effective teacher demonstrates mastery of the state board of education adopted professional teaching standards, as determined by classroom observations required by ARS §15-537."[5] Other key terms are defined later in this document. Districts and charters were to have these definitions in place by school year 2013-14.

The Framework was adopted by the Arizona State Board of Education in 2011 and measures teacher effectiveness through performance data made up of student assessment data (33-50% of the measurement), instruction observation performance aligned to the InTASC teaching standards or ISSLC leadership standards (50-67%) and an optional set of school level or system level data which could include parent and student surveys as well as Student Learning Objectives. These data then informs a score that corresponds to one of four performance labels: highly effective, effective, developing, and ineffective.[6]

It is important to note that by connecting the need for equitable access to effective educators for students in underserved populations, ADE is actually looking at how to expand access to effective and highly effective instruction for all students. As indicated by the resources available from the Center on Great Teachers and Leaders, these state plans should not be, "a narrow and impractical redistribution of high-quality educators from low-need to high-need districts, schools, and classrooms, but rather a comprehensive approach to strengthening and maintaining teacher and principal effectiveness across the state, with an emphasis on…schools and classrooms with the greatest need."[7]

To create this document, the ADE Associate Superintendent for Highly Effective Teachers and Leaders assembled a team of leaders and specialists and developed an action plan that:

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[4] ARS §15-203 and ARS §15-537
[5] Arizona Framework for Measuring Educator Effectiveness
[6] Ibid
[7] Center on Great Teachers & Leaders at American Institutes for Research

1. Brainstormed the actions needed to review and document this process.
2. Developed a long-term planning guide to research the issue and root causes, then examine potential strategies for engaging stakeholders in ensuring equitable access to excellent educators. The plan divided the work among team members to research data, write plan elements, conduct stakeholder meetings, and communicate with internal and external partners.
3. Researched and reviewed data provided by USED Civil Rights Data Collection (CRDC), ADE, local education agencies, and other data systems to identify equity gaps.
4. Examined current state-level policies and statutes such as plans for educator retention and recruitment, human capital management policies, educator preparation programs, current licensure requirements, and all data surrounding the implementation of the state's Framework for Measuring Educator Effectiveness.
5. Conducted internal staff meetings to discuss potential root causes and strategies.
6. Established a communication plan for contacting stakeholders for individual interviews and Town Hall sessions around the state.
7. Conducted a series of stakeholder meetings to gather quantifiable and qualifiable data, complete root-cause analyses, and generate a common understanding of the issue and its challenges.
8. Set measurable targets and created a plan for measuring and reporting progress and continuously improving this plan.
9. Submitted plan for approval among ADE leadership as well as LEA partners and stakeholders.

During the internal discussions (Step 5), ADE acknowledged that the vast geographic size coupled with the diverse demographics of the state would make it difficult for the agency to craft a "one-size fits all" plan. The agency decided to focus on three geographic/socio-economic regions of the state, each with very unique characteristics and challenges. Within those areas a set of school districts was initially chosen that would not only be an effective representative sample of the region but were also LEAs that the agency worked closely with and would be most receptive to providing data and trying new strategies. The hope of course would be that if the strategies are effective in these particular districts that they could potentially be replicated statewide.

The Remote Region is Arizona's vast Native American population. While the Navajo and Hopi Nations in the northeast corner of the state and the Apache Nations along the central and eastern sections of the state make up the majority of tribal lands, Arizona is home to twenty-

two sovereign nations whose members make up approximately 6% of the state's population.[8] Arizona ranks third behind Oklahoma and California in tribal population but more than 16% of the nation's Native American students are enrolled in Arizona schools.[9] This report identifies one Navajo Nation district as an example of the unique needs of the very remote areas of the state.

The Rural Region examines the rural areas that make up the majority of the state's land mass. For this area we compare four districts: one in central Arizona near metropolitan Phoenix, two in northern Arizona, and one in southern Arizona along the border with Mexico. It is important to note that these rural districts differ in demographics and median income due to remoteness, proximity to ranch land or an urban area, or nearness to a neighboring state and its economic benefits.

The Urban Region focuses on the challenges of some of the state's urban districts. Our four selected districts appear similar at first glance, but upon closer examination each present their own special set of challenges and celebrations.

Data for this process were gathered from a variety of sources, including stakeholder meetings, the districts being profiled, and within ADE's own databases. The ADE team first discussed the issue and arrived at a common understanding of terms, challenges, and data points. After this internal analysis and the development of a plan of action, the team was able to:

- Review current policies and initiatives;
- Identify specific contact points and stakeholders within the targeted areas;
- Present existing state policy and practice for improving educator recruitment, retention, development, and support as well as current licensure and reciprocity policies;
- Connect with Educator Preparation Programs within the state to examine concerns about the availability of students choosing to enter the education profession;
- Analyze the data surrounding the state's Framework for Measuring Effective Educators and the availability of data indicating educator performance ratings;
- Conduct interviews with current district leaders and noted researchers;
- Facilitate meetings with local stakeholders including teachers, administrators, higher education officials, government officials and parents; and
- Examine all available data provided by the CRDC, as well as the longitudinal school data available in ADE's systems as reported by the Local Education Agencies in the state.

[8] American Indian Tribes and Communities in Arizona.
[9] American Indian Congress

Section 2: Stakeholder Engagement

Arizona is home to the sixth, thirty-third and thirty-eighth largest cities in population in the United States (Phoenix, Tucson, and Mesa respectively). [10] These three cities help contribute to two large urban counties: Maricopa and Pima. While the rest of the state has urban pockets (Flagstaff, Prescott, and Yuma, in particular) those areas outside Maricopa and Pima remain mostly rural, agricultural, and remote, particularly the Native American communities on the two largest tribal lands in the far eastern and northern parts of the state. The larger of the two urban counties generally drives most of the economic and political decisions for Arizona, causing some in rural areas to not so fondly refer to this area as the "State of Maricopa." The state is geographically very large and its diverse population is made up of a wide variety of racial and ethnic classifications, as well as every level of socio-economic status. Each of these classifications is distributed across age groups and education levels. Arizona's climate, both environmental and political, attracts residents from across the United States and the world leading to diversity in its opinions, communities, and legislation.

ADE recognizes it is important to develop a plan that addresses the equity issue in general enough terms to provide guidance for individual LEAs to implement strategies that will best fit their needs and the needs of their communities. Such a plan requires input from stakeholders from around the state to help identify root causes, assist in suggesting possible strategies, provide constructive feedback on the overall plan, and foster ongoing communication throughout its implementation. ADE also believes that this plan should not just be a document to comply with federal requirements but one that will exist as an evolving guidance tool to support LEAs in creating and implementing hiring and evaluation practices that will lead to an effective educator workforce connected to all students.

ADE assembled a team within its Highly Effective Teachers and Leaders Division charged with researching and examining the impact of this issue. The team attended webinars and national conferences, researched state and national data, and then organized a series of Town Hall meetings in spring 2015 to examine root causes, discuss potential strategies and continually gather feedback. The team was also able to be on the agenda of a variety of community, business, and government policy groups to present and gather feedback on the issue. Three of these groups, the Educator Retention and Recruitment Taskforce, the Yuma County School Superintendents, and the Greater Phoenix Educational Management Council are particularly concerned with this issue and are each examining ways to increase the pipeline of effective educators in the state. See Appendices B and C for a breakdown of the town hall meeting

[10] Top 50 Cities in the US by Population and Rank, published by Pearson, Inc.

invitation, agenda, and outcomes, as well as information on the stakeholders engaged in the process.

The purpose of these Town Hall meetings was for stakeholders to:

- Generate a common understanding of the issues surrounding equitable access to excellent educators;
- Review data and examine the root causes of Arizona's Key Concerns;
- Identify and prioritize root causes of inequities in access to excellent teachers and leaders;
- Identify and develop potential strategies to address the issue; and
- Review and provide feedback on the draft plan.

Using its distribution lists of district and school contacts, community and civic groups, parents and personal networks, ADE connected with stakeholders across the state to secure meeting locations and publicize the event. Eighteen sessions were held across the state with particular attention paid to ensure participation from each of the three studied Regions (see Appendix B). ADE staff members also attended a variety of communities of practice, conferences and county sponsored meetings and were able to get sufficient time on those agendas to take participants through several group discussions in order to gather feedback on the plan, identify root causes and assist in identifying strategies.

Each meeting was attended by a diverse group of citizens and included educators, administrators, school board members, parents, students, community leaders, representatives from the universities and community colleges, business leaders, and ADE staff. To ensure that the conversations were productive and solutions-oriented, we used structured discussion protocols and had available the Public Agenda discussion guide on equitable access to excellent educators.[11]

ADE facilitated each Town Hall by first leading the participants through a brief review of the data and historical context of the equity issue. Initially, small discussion groups comprised of like members were formed and focused on discussing three essential questions:

1. What does equitable access to excellent educators mean to you?
2. What are the struggles related to equitable access to excellent teachers in your community?
3. What opportunities exist for implementing solutions?

The team received a great many answers to these questions. Each response, regardless of the location of the meeting, highlighted the crisis situation Arizona faces with regard to access to

[11] How Can We Ensure That All Children Have Excellent Teachers 2015

effective educators, especially for the three geographic regions profiled in this plan. The initial feedback included comments such as:

- In rural communities, you get the folks you can get.
- Tenured teachers get to teach the classes they want.
- In order to move teachers, we need recruitment stipends.
- Legislators need to spend time in schools to see the dire straits.
- Students should have access to effective educators regardless of school, district, SES, ELL, etc.
- Every student should have access to a quality educator. Every Arizona graduate should promote from one level to the next prepared to succeed in the next.
- One issue for us, staff turn-over, annually or at any time "I'm not coming back on Monday."
- We're impacted by the varying salary schedule of neighboring school districts.
- Lack of candidates.
- C, D, F schools can have incredibly effective teachers who work very diligently to overcome socioeconomic factors. A, B schools can have poor teaching but great test scores and their teachers are "effective." This is the main issue.
- Districts with low SES and high minority populations may not be able to attract (let alone retain) teachers meeting this criteria. Teachers working in these districts and under these conditions may not feel supported by administration and leave for better working conditions (pay, working climate, respect, etc.)

Over time, as the team gathered more and more commentary, the sessions evolved. We provided the ADE root cause analyses and conducted an exercise with each group to not only gather feedback on the prior work but to have them generate their own possible causes. This information fed the team's "fishbone" analyses included later in this report and then helped support conversations leading toward strategies and implementation. Conversations at the later meetings naturally grew toward solutions and by the end of the process in May, the final set of scheduled meetings, including a statewide webinar, served to gather feedback on this final document prior to submission to USED. The statewide webinar was designed as an opportunity to connect back to all the individuals that attended the stakeholder meetings to see the progress of the report and provide additional feedback before this final report was submitted.

Each discussion group was attended by members of the ADE team who recorded the responses to the questions and served to keep the conversation on track, but the groups were allowed to proceed through the activities on their own in order to develop a rich conversation that was particular to the needs of each group. This commentary and the root cause activities helped inform ADE's theory of action, described later in this report.

Following each meeting, the session participants were emailed a copy of the compiled responses and were encouraged to continue the dialogue. It is ADE's intent to also send participants a copy of the final plan as a follow up to their participation.

In order to share this information quickly and easily with the general public, ADE will add a page to its agency web site that presents the data and specifically outlines the equity gaps with regard to economically disadvantaged students and students of color. The page will contain links to this plan as well as the relevant data and stakeholder feedback collected that help us determine the overall gaps. Important data to present on the page will include the gap calculations in Tables 3 & 4 which appear later in this plan as well as the overall goals for improvement listed in Table 15 later in this plan. The page will also be used to help monitor progress and goals and data will be updated at least annually as we demonstrate progress. A member of the Highly Effective Teachers and Leaders Division staff will regularly update the information as we receive continual stakeholder feedback as strategies are piloted.

Additional stakeholder involvement will take the form of biannual conference calls or interactive webinars during which stakeholders are updated on the plan's progress as well as the latest equity gap data. ADE could also use this forum to solicit feedback on how to continue to address equitable access to experienced & effective teachers in the nine profiled districts as well as across the state.

The nine identified districts within the three geographic regions provided valuable resources such as demographic data and anecdotal information gathered through in person interviews. ADE will continue to involve these districts as the plan moves forward to support them with the implementation of suggested strategies in the hopes that successful processes can be replicated across the state. ADE will also reassemble the initial planning team into an ongoing working group that will organize sessions to provide training opportunities to LEAs and then continue to provide support to individual LEAs if they choose to implement the suggested strategies listed in Section 4. ADE further proposes to review the plan after years one, three, and five to continue to research the issue of equitable access and determine how to evolve the plan to continue to present and support best practices in leadership and instruction. We will develop specific action steps and planning guides in order to establish periodic stakeholder involvement opportunities and avenues to disseminate information.

Section 3: Equity Gaps

Definition of Key Terms

Arizona's diverse student population and multiple socio-economic levels across and within its communities, combined with its economic and political climate, has resulted in teachers and leaders of varying effectiveness being employed in its schools. In order to examine the data and discuss strategies with stakeholders, it is important to have a common language for key terminology. Such key terms as "student of color," "economically disadvantaged," "inexperienced," and "unqualified" are derived from federal definitions and appear throughout the data sources. Discussion of this issue at the federal level has also moved from "qualified" and "highly qualified" to "excellent." Arizona's evaluations of teachers and leaders uses such terms as "effective" and "highly effective" in place of "excellent." See Appendix C for a definition of key terms.

For purposes of much of the data reporting and subsequent analysis in this report, it is important to reiterate Arizona's commitment to local control which occasionally hinders ADE's ability to gather sufficient information or provided targeted support. Due to local control, LEAs self-report their information to ADE, leading to some gaps or inequalities in the data, including that of the effectiveness ratings of teachers. Statute requires that the effectiveness rating come from an aggregate score derived from multiple data points, including classroom observations and student achievement data, with the possible inclusion of parent and student survey data. Some LEAs have created their own models based on the InTASC Model Core Teaching Standards, but the majority in Arizona, that we are aware of, uses one of the following:

- Charlotte Danielson's *The Framework for Teaching;*
- James Stronge's *Teacher Effectiveness Performance Evaluation System;*
- National Institute for Excellence in Teaching's *TAP: System for Teacher and Student Achievement* (implemented by districts partnering with Arizona State University in a Teacher Incentive Fund 3 grant); or
- Maricopa County Education Service Agency's *Rewarding Excellence in Instruction and Leadership* (implemented by districts partnering with this agency in Teacher Incentive Fund 3 and 4 grants).

Regardless of the model used, the difference between an effective teacher and a highly effective teacher is significant. Most definitions would indicate the effective teacher is "proficient", meaning they are skilled, competent, or experienced in the art of teaching and that students make expected levels of academic progress of one year or more. The highly effective teacher is often described as "exemplary." They are the model teacher that demonstrates the

highest instructional and pedagogical skills and their students routinely perform above expected levels of academic progress, with sometimes at least two years of growth.[12]

Description of Data Points

In order to fully determine the inequity that exists within the state, ADE had to examine a variety of measurable data surrounding educator effectiveness. The team quickly realized that the issues at the heart of inequity vary in intensity across the state and differ particularly among the urban and rural areas. As stated before, the team explored three regions and particular school districts within each region to provide a snapshot of the larger set of issues. In addition, data was gathered from a variety of sources including the Office of Civil Rights demographic data supplied by USED. This 2011 data is the most recent information available for measuring the poverty and minority quartiles. Data elements that were examined include:

- The district's report card grade (2013-14);
- Student achievement data trend data for math and reading (2011-2014);
- Percentage of free and reduced lunch students as a measure of poverty (2011 OCR data);
- Ethnic and racial groups as a measure of minority status (2011 OCR data);
- Number of inexperienced teachers (2013-14);
- Combined number of non-highly qualified and out of field teachers (2013-14); and
- LEA self-reported numbers of teacher effectiveness ratings (2013-14).

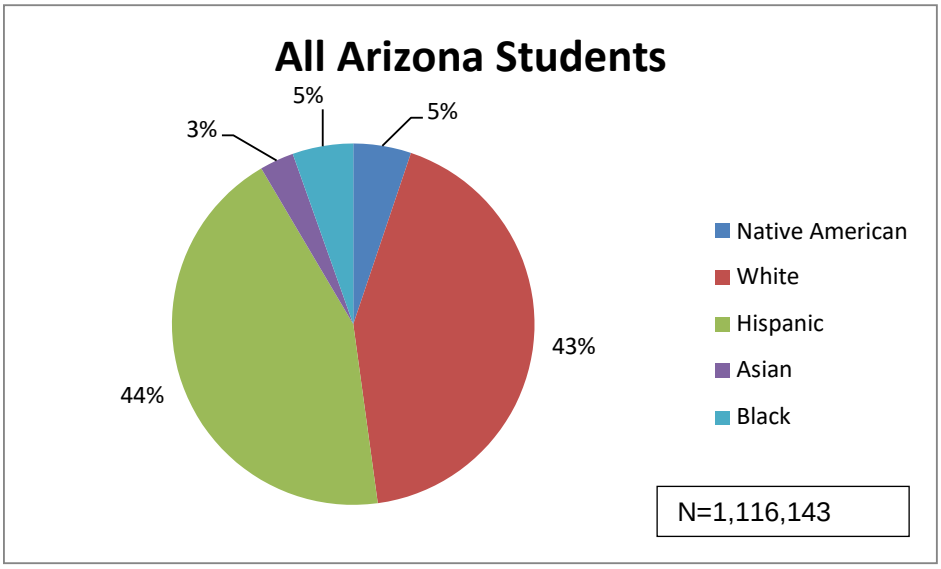
The ADE team discussed the importance of the data elements for out of field and inexperienced teachers. There is national research that supports a positive correlation to student achievement regardless of certification status, assuming the teacher was teaching in their specifically trained content area while those teaching out of field had a negative effect on student achievement.[13] Along those same lines, there are reports that the number of years of experience a teacher has will not necessarily negatively impact student achievement, if they are teaching out of field. Ferguson & Ladd (1996) suggest inexperienced teachers often have newer ideas for instructional approaches and an enthusiasm for teaching that comes across more clearly to students. However, the number of years of experience does benefit the classroom by allowing the teacher to more effectively support classroom management and planning.

[12] TAP: The System for Teacher and Student Advancement
[13] Darling-Hammond, et al., 2001; Goldhaber & Brewer, 2000.

The Equity Gap in Arizona

The following tables and figures present the data for all Arizona students and schools, statewide poverty and minority quartiles, and then a profile description of the nine districts ADE examined to support the equity gap and root causes analysis.

Figure 1



Statewide school data, based on 2011 OCR information, was sorted twice to identify the quartiles for poverty and those of high minority status. It is important to note that 941 schools (roughly 50%) had identical quartile rankings in both poverty and minority but the other fifty percent shows the striking differences among LEAs throughout Arizona. Some of the difference in numbers of schools for each quartile, when tallying the totals of both Tables 1 and 2, is due to how data were reported. Some schools did not report their free and reduced status while others may not have accurately reported their student ethnicity. Those schools were removed from their respective tables but do not represent a wide enough disparity to impact the overall data analysis.

Table 1--All Arizona Poverty Quartiles

	Q1	Q2	Q3	Q4	Total
Schools	**464** (25%)	**466** (25%)	**467** (25.4%)	**436** (24.6%)	**1,833**
Students	**280,369** (26.6%)	**290,518** (27.5%)	**253,074** (24%)	**230,878** (21.9%)	**1,054,839**[14]
Students w/ Free & Reduced (% of Quartile)	**41,261** (14.7%)	**102,004** (35.1%)	**157,791** (62.3%)	**205,546** (89%)	**506,602** (48%)
Teachers	**14,676**	**13,879**	**11,650**	**10,535**	**50,740**[15]
Out of Field / Not Qualified (% of Quartile)	**1,609** (11%)	**846** (6.1%)	**1,031** (8.8%)	**1,086** (10.3%)	**4,572** (9%)
Inexperienced (% of Quartile)	**2433** (16.6%)	**2453** (17.7%)	**2426** (20.8%)	**2862** (27.2%)	**10,174** (20.1%)
Ineffective (% of Quartile, % of State)	**224** (1.5%) (.4%)	**218** (1.6%) (.4%)	**220** (1.9%) (.4%)	**244** (2.3%) (.5%)	**906** (1.8%)
Developing	**814** (5.5%) (1.6%)	**667** (4.8%) (1.3%)	**949** (8.1%) (1.9%)	**1,278** (12.1%) (2.5%)	**3,708** (7.3%)
Effective	**8,447** (57.6%) (16.6%)	**8,923** (64.3%) (17.6%)	**7,528** (64.6%) (14.8%)	**6,433** (61.1%) (12.7%)	**31,331** (61.7%)
Highly Effective	**5,191** (35.4%) (10.2%)	**4,071** (29.3%) (8.0%)	**2,953** (25.3%) (5.8%)	**2,580** (24.5%) (5.1%)	**14,795** (29.2%)

[14] According to 2011 OCR data. Estimates for School Year 2014-15 were in excess of 1.1 million students across the state.
[15] Based on 2013-14 LEA submitted teacher effectiveness ratings.

Figure 2

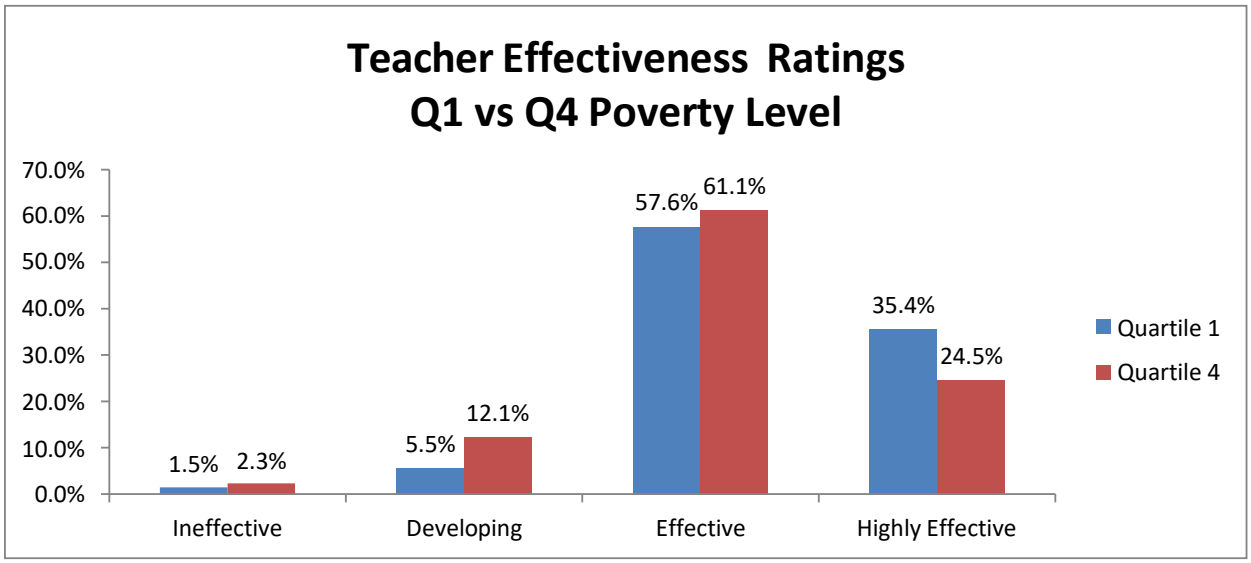


Figure 3

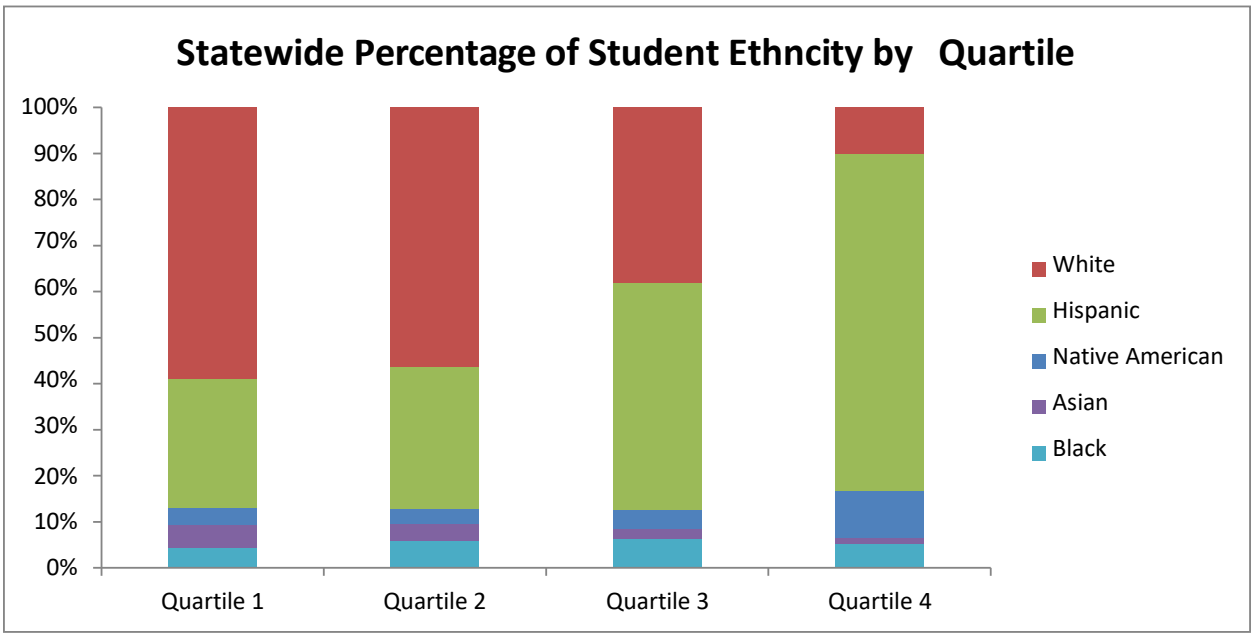


Table 2—All Arizona Minority Quartiles

	Q1	Q2	Q3	Q4	Total
Schools	**482** (25.9%)	**479** (25.8%)	**481** (25.9%)	**417** (22.4%)	**1,859**
Students	**288,532** (27.4%)	**278,650** (26.4%)	**263,841** (25%)	**223,678** (21.2%)	**1,054,701**[16]
Minority Percentage	**24.13**	**45.7**	**75.53**	**96.51**	**60.5**
Teachers	**13,996**	**13,626**	**12,592**	**10,513**	**50,727**
Out of Field / Not Qualified (% of Quartile)	**1,254** (9%)	**982** (7.2%)	**978** (7.8%)	**1,319** (12.5%)	**4,533** (9%)
Inexperienced (% of Quartile)	**2260** (16.1%)	**2472** (18.1%)	**2742** (21.8%)	**2931** (27.9%)	**10,405** (20.5%)
Ineffective (% of Quartile, % of State)	**199** (1.4%) (.4%)	**250** (1.8%) (.5%)	**235** (1.9%) (.5%)	**221** (2.1) (.4%)	**905** (1.8%)
Developing	**783** (5.6%) (1.5%)	**813** (6.0%) (1.6%)	**926** (7.4%) (1.8%)	**1,182** (11.2%) (2.3%)	**3,704** (7.3%)
Effective	**7,852** (56.1%) (15.5%)	**8,590** (63%) (16.9%)	**7,988** (63.4%) (15.7%)	**6,893** (65.6%) (13.6%)	**31,323** (61.7%)
Highly Effective	**5,162** (36.9%) (10.2%)	**3,973** (29.2%) (7.8%)	**3,443** (27.3%) (6.8%)	**2,217** (21.1%) (4.4%)	**14,795** (29.2%)

[16] See the description above Table 2 for an explanation on the population variances.

Figure 4

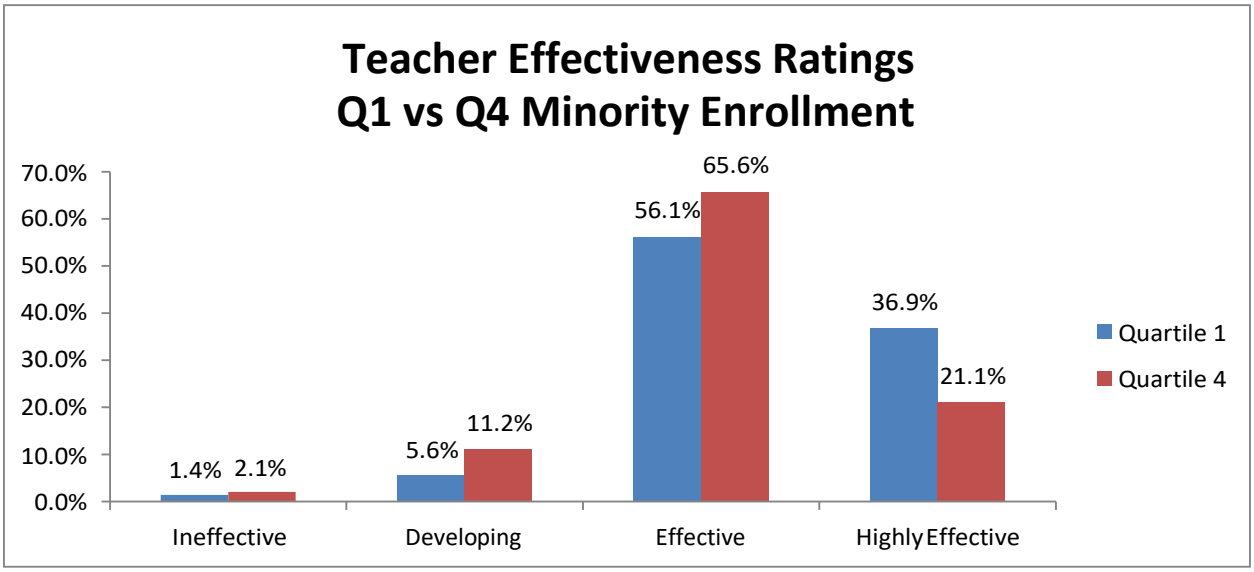


Table 3--Data Analysis Summary

	Quartile 1			Quartile 4		
	Out of Field	**Inexperienced**	**Developing / Ineffective**	**Out of Field**	**Inexperienced**	**Developing / Ineffective**
Poverty	11%	16.6%	7%	10.3%	27.2%	14.4%
Minority	9%	16.1%	7%	12.5%	27.9%	13.3%

Table 4—Equitable Access Gap Summary

	Economically Disadvantaged	Students of Color
Inexperienced Teachers	10.6% more in Q4 than Q1	11.8% more in Q4 than Q1
Teachers Rated as Developing or Ineffective	11% more in Q4 than Q1	6.3% more in Q4 than Q1
Out of Field / Unqualified Teachers	.7% less in Q4 than Q1	3.5% more in Q4 than Q1

It is apparent from Tables 1 and 2, that equity gaps exist in calculations of both minority and poverty schools. We see that students in both poverty and minority Quartile 4 are more likely to be taught by inexperienced teachers. This is consistent with national research that indicates when data is sorted to show differences among achievement, racial, and socio-economic composition of classrooms, the highest-need students are most likely to have the least experienced teachers.[17]

When teacher effectiveness ratings are included, students in poverty and minority Quartile 4 respectively have 11% and 6.3% more Developing teachers than their counterparts in Quartile 1. It is when we compare the number of Developing and Ineffective teachers in a given LEA with its overall report card rating that we see a larger concern that is raised later in this report.

Ratings for out of field or non-highly qualified teachers were computed but significant disparities, as evident in Tables 1 and 2, were not found.

To get a closer view of the distribution of teachers and students across Arizona's regions, ADE chose nine sample districts that are not only representative of their region but also are districts that have worked closely with ADE in the past and, due to that relationship, are considered likely candidates for successful implementation of suggested strategies. Permission was given from each district to present their profiles in this report.

Region 1 – Remote:

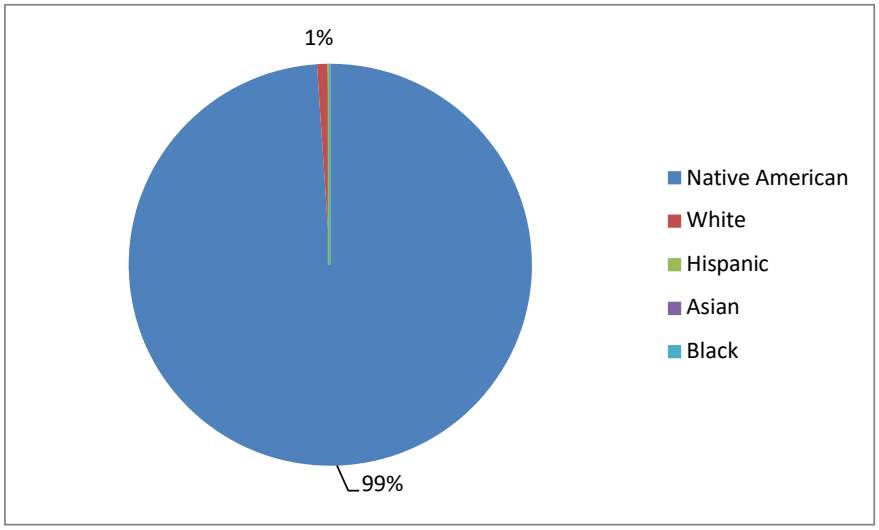
Red Mesa Unified School District

This unified district is located in the northeast corner of the state approximately five miles from the Utah border and 50 miles from Four Corners National Monument. It is one of many communities in the Navajo Nation and its location represents one of the most remote areas in the state. The Quartile 4 district draws from the many nearby smaller communities and census districts in Arizona, Utah and New Mexico. The median household income is $24,056, approximately 48% of the state average. The median age is 29 years old, 21% have a high school diploma, and 6% have a bachelor's degree. This district has five schools: two elementary, one junior high school, and two high schools.

[17] Kalogrides and Loeb (2013).

Table 5--Red Mesa Unified School District

District Report Card Grade	D
Grades Served	K-12
Number of Students	727
Free and Reduced Lunch	89%
Average Salary	$35,328
Absenteeism	1 (2%)
Inexperienced Teachers	10 (17%)
Out of Field/Non-HQ Teachers	15 (25%)
Ineffective Teachers	3
Developing Teachers	2
Effective Teachers	54
Highly Effective Teachers	0



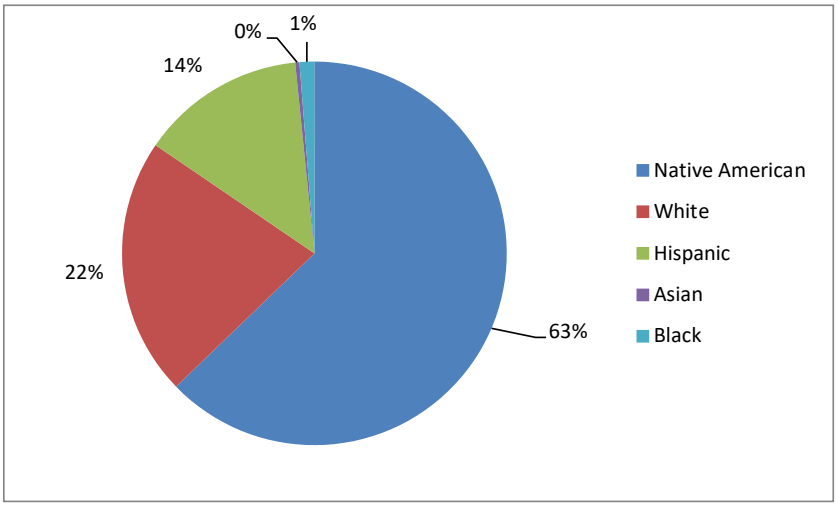
Region 2--Rural:

Holbrook Unified School District

This unified district is located in northeast Arizona. Its closest medium to large city is Flagstaff, 90 miles away. The current population is 1346, with a median household income of $43,840 (approximately 88% of the state average). Of this population, the median age is 34 years old, 11% have a high school diploma, and 12% have a bachelor's degree or higher. This district has five schools in both Quartile 3 and 4: three elementary, one junior high school, and one high school.

Table 6—Holbrook Unified School District

District Report Card Grade	B
Grades Served	K-12
Number of Students	2225
Free and Reduced Lunch	74%
Average Salary	$49,706
Absenteeism	11 (8%)
Inexperienced Teachers	11 (8%)
Out of Field/Non-HQ Teachers	9 (7%)
Ineffective Teachers	0
Developing Teachers	7
Effective Teachers	99
Highly Effective Teachers	27

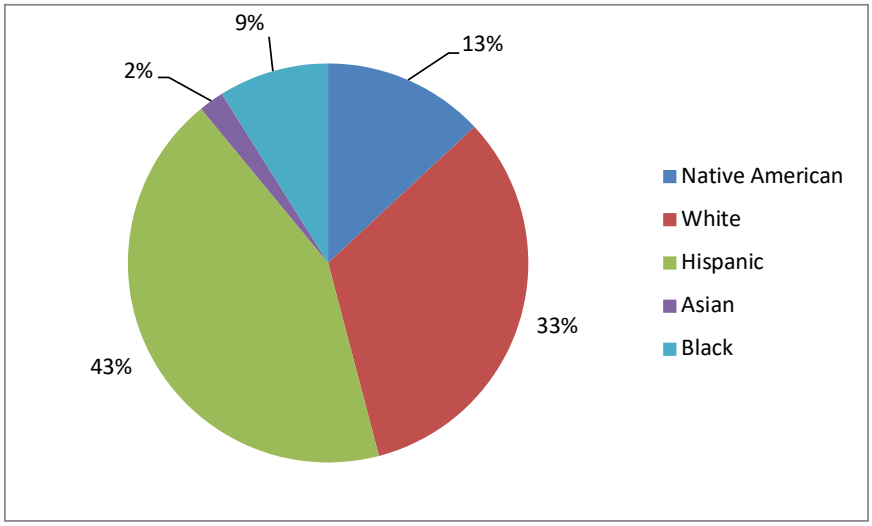


Coolidge Unified School District

This unified district spanning both Quartiles 3 and 4 is located in south-central Arizona approximately 57 miles from Phoenix. While it is close to the metropolitan Phoenix area, it shares many of the same issues as rural areas in the state. The current population is 12,942, with a median household income of $48,088. Of this population, the median age is 39 years old, 23% have a high school diploma, and 13% have a bachelor's degree or higher. The district has ten schools: a pre-K early childhood school, one 6-12 alternative school, four elementary, two middle, and two high schools.

Table 7—Coolidge Unified School District

District Report Card Grade	D
Grades Served	K-12
Number of Students	2665
Free and Reduced Lunch	72%
Average Salary	$39,833
Absenteeism	35 (20%)
Inexperienced Teachers	37 (21%)
Out of Field/Non-HQ Teachers	24 (14%)
Ineffective Teachers	12
Developing Teachers	53
Effective Teachers	99
Highly Effective Teachers	11

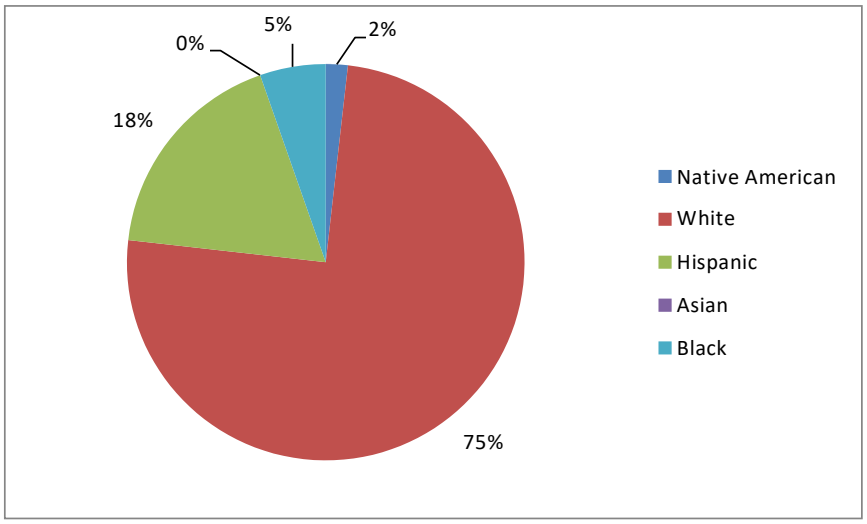


McNeal Elementary School District

This elementary district is one of many rural communities in southern Arizona and is approximately 20 miles from the Mexican border. Its closest urban city is Tucson, 123 miles away. The current population is 238, with a median household income of $42,445. Of this population, the median age is 55 years old, 33% have a high school diploma, and 13% have a bachelor's degree or higher. The Quartile 3 district is comprised of one K-8 school.

Table 8—McNeal Elementary School District

District Report Card Grade	B
Grades Served	K-8
Number of Students	40
Free and Reduced Lunch	54%
Average Salary	$38,353
Absenteeism	0
Inexperienced Teachers	0
Out of Field/Non-HQ Teachers	0
Ineffective Teachers	0
Developing Teachers	0
Effective Teachers	4
Highly Effective Teachers	0

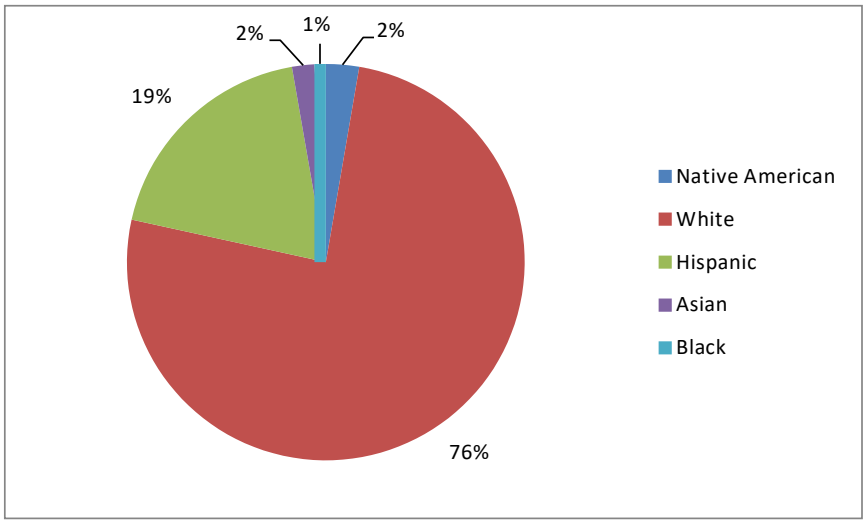


Kingman Unified School District

Located in northwest Arizona approximately 25 miles from the California/Nevada border, this district has Las Vegas, Nevada as its closest urban city, 103 miles away. The current population is 20,404, with a median household income of $52,283 which is approximately 104% of the state average. Of this population, the median age is 41 years old, 13% have a high school diploma, and 14% have a bachelor's degree or higher. The district has twelve schools: five K-5, one K-6, one K-7, one K-8, two 6-8, and two high schools and has representation in all four Quartiles.

Table 9—Kingman Unified School District

District Report Card Grade	B
Grades Served	K-12
Number of Students	7080
Free and Reduced Lunch	66%
Average Salary	$35,727
Absenteeism	104 (30%)
Inexperienced Teachers	60 (16%)
Out of Field/Non-HQ Teachers	35 (10%)
Ineffective Teachers	2
Developing Teachers	13
Effective Teachers	229
Highly Effective Teachers	97



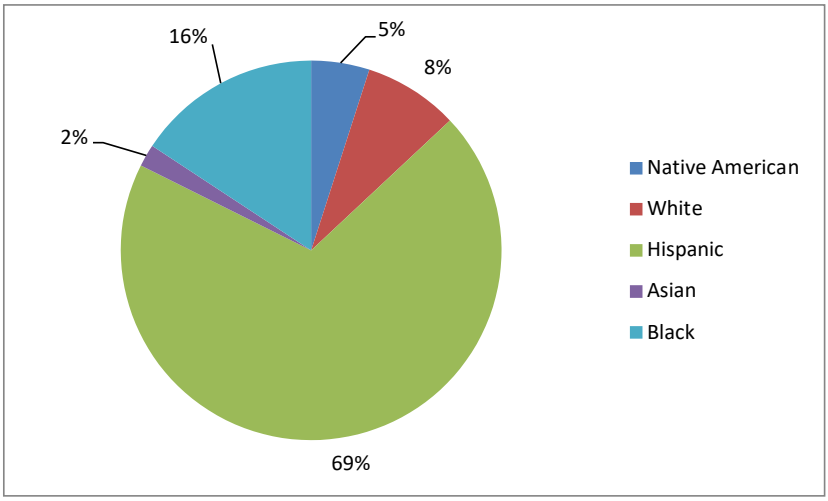
Region 3 -- Urban

Balsz Elementary School District

This is an urban elementary district in Phoenix, Arizona and feeds into the Phoenix Union School High School District. Phoenix is the largest community in the state, and is located in central Arizona. The current population is 1,501,527, with a median household income of $64,137, approximately 128% of the state average. Of this population, the median age is 35 years old, 19% have a high school diploma, and 25% have a bachelor's degree or higher. This district is one of many Quartile 4 elementary school districts in the City of Phoenix. It is near the urban core, adjacent to Sky Harbor International Airport, and is bisected by AZ-202, a major highway providing access from downtown Phoenix to the eastern edges of Maricopa County. The district has four elementary schools.

Table 10 – Balsz Elementary School District

District Report Card Grade	C
Grades Served	K-8
Number of Students	2680
Free and Reduced Lunch	92%
Average Salary	$39,965
Absenteeism	29 (20%)
Inexperienced Teachers	38 (26%)
Out of Field/Non-HQ Teachers	9 (6%)
Ineffective Teachers	4
Developing Teachers	55
Effective Teachers	71
Highly Effective Teachers	18

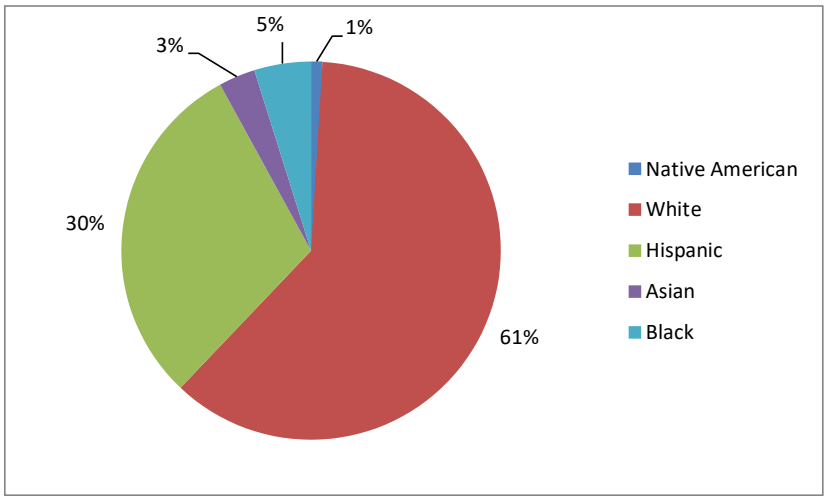


Peoria Unified School District

This unified district is located in Phoenix, west of the urban core. The current population of the community is 162,592, with a median household income of $57,424, approximately 125% of the state average. The city is bisected diagonally by US 60, a major thoroughfare known as Grand Avenue that connects Phoenix with Las Vegas, Nevada. This road also shares space with one of the main lines for the Burlington Northern-Santa Fe railroad. The median age is 43, 90% of the population over the age of twenty-five has a high school diploma, and 26% have a bachelor's degree or higher. The district is represented in Quartiles 1, 2, and 3 and is comprised of forty elementary and high schools.

Table 11 – Peoria Unified School District

District Report Card Grade	^
Grades Served	K-12
Number of Students	36,987
Free and Reduced Lunch	41%
Average Salary	$43,000
Absenteeism	84 (5%)
Inexperienced Teachers	249 (14%)
Out of Field/Non-HQ Teachers	45 (3%)
Ineffective Teachers	1
Developing Teachers	32
Effective Teachers	1115
Highly Effective Teachers	629

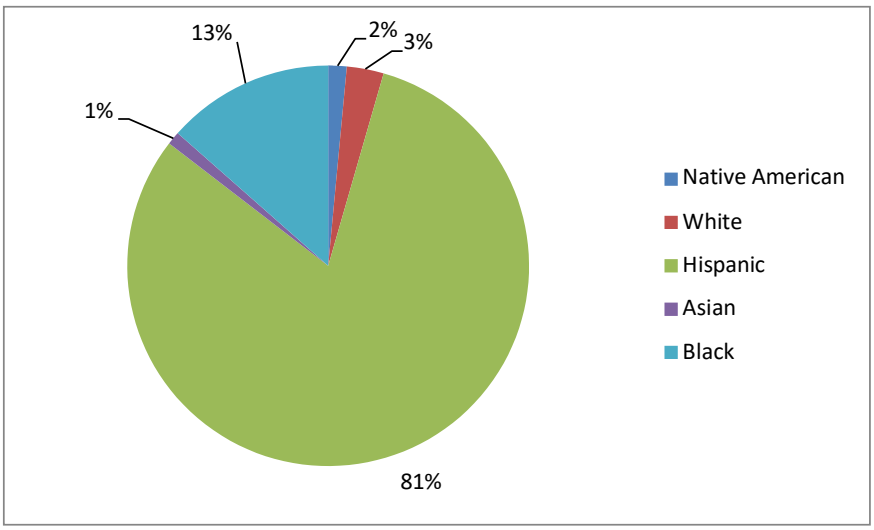


Roosevelt Elementary School District

This large elementary district in Quartile 4 is an urban district on the south side of Phoenix and feeds into the Phoenix Union School High School District. The district is adjacent to the urban core and Sky Harbor International Airport. It is bounded by South Mountain, the largest city park in the United States and Interstate 10. The district is bisected by the normally dry bed of the Rio Salado and is comprised of a diverse mix of industry, mining, warehouses, and low to middle income housing communities. The district supports nineteen K-8 schools including one early childhood center.

Table 12 – Roosevelt Elementary School District

District Report Card Grade	C
Grades Served	K-8
Number of Students	9614
Free and Reduced Lunch	87%
Average Salary	$39,690
Absenteeism	225 (53%)
Inexperienced Teachers	76 (18%)
Out of Field/Non-HQ Teachers	42 (10%)
Ineffective Teachers	35
Developing Teachers	218
Effective Teachers	129
Highly Effective Teachers	40

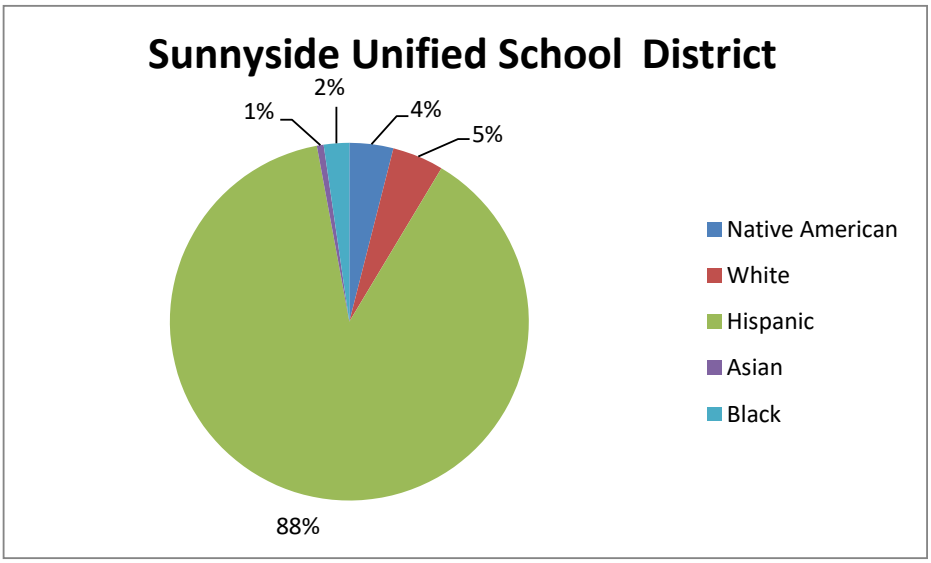


Sunnyside Unified School District

This unified district in Quartile 3 is located on the south side of Tucson. The district is near the city's urban core, Tucson International Airport and Davis-Monthan Air Force Base. The district has worked to develop multiple partnerships with the community as well as grants and technology support from the University of Arizona and Arizona State University. The district supports twelve elementary schools, six middle and intermediate schools, and two high schools.

Table 13 – Sunnyside Unified School District

District Report Card Grade	C
Grades Served	K-12
Number of Students	17613
Free and Reduced Lunch	61%
Average Salary	$42,133
Absenteeism	434 (49%)
Inexperienced Teachers	187 (21%)
Out of Field/Non-HQ Teachers	38 (4%)
Ineffective Teachers	14
Developing Teachers	109
Effective Teachers	406
Highly Effective Teachers	263



State Comparisons

The sample LEAs located in Arizona's Remote, Rural and Urban Regions encompass approximately 71,000 students. This is roughly 6.5% of the population of all K-12 students in Arizona. The discussion of inequities begins to take shape with a closer look at students of poverty and minority. The state average for students qualifying for free or reduced lunch is 48% with the Remote, Rural and Urban Regions as a whole averaging over 75%. Figures 5 and 6 show the varying levels of poverty across our Regions and sample districts.

Figure 5

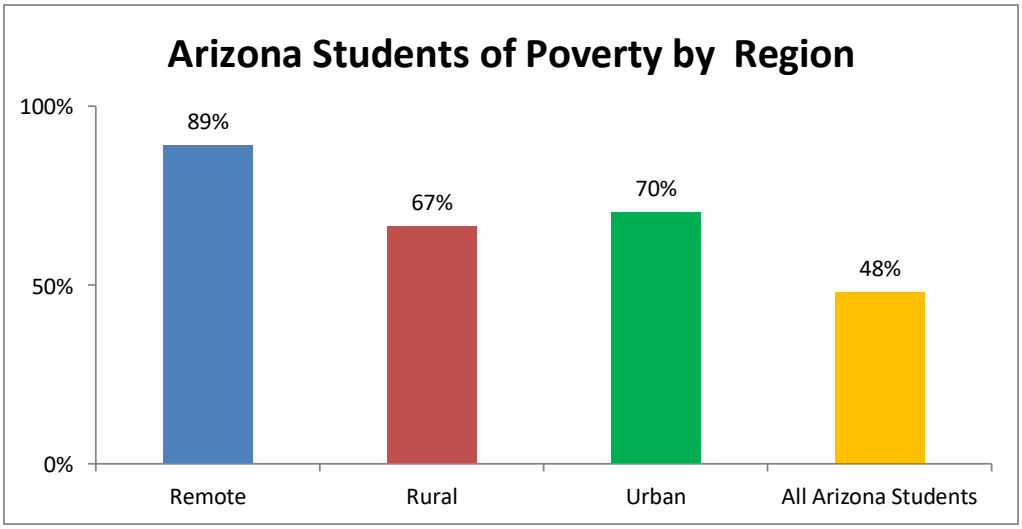
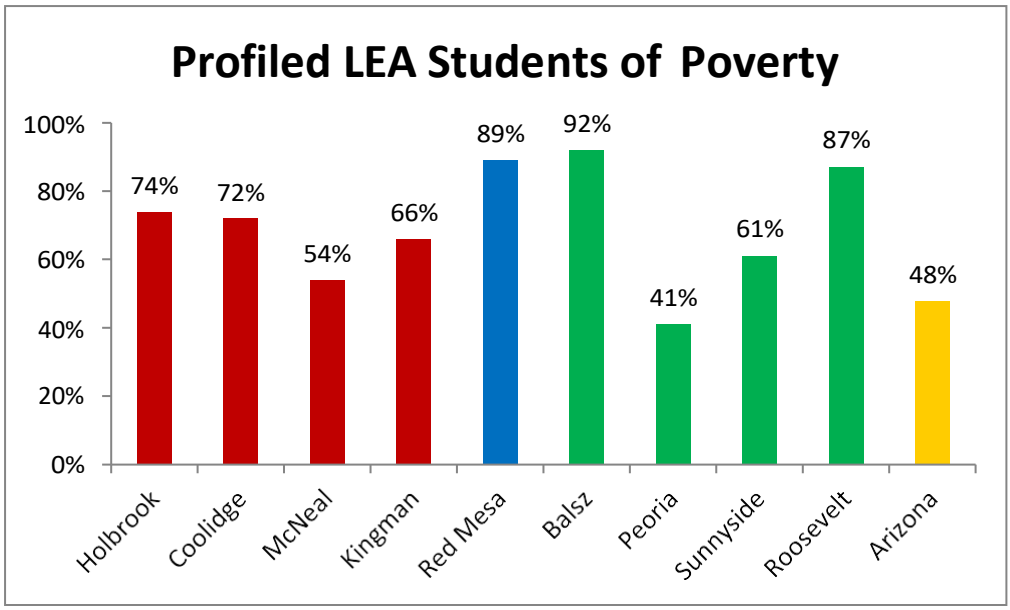


Figure 6



Arizona's distribution of students of color is also disproportionate across the state with students of color in the highest poverty quartile in some counties but not others. This is due to a variety of factors including the county's urban or rural (agricultural) setting, geographic location along the border with Mexico, number or size of the Native American lands within the county, or simply where travelers settled when the territory was first established in 1863. Table 14

demonstrates that percentage distribution across the fifteen counties in the state. Districts for this report come from Apache, Cochise, Mohave, Maricopa, Navajo, Maricopa, and Pinal Counties.

Table 14—Distribution of Minority Students in the Highest Poverty Quartile by County

County	Total Number of Students	Number of Minority Students (% of Total Population)
Apache	12,234	7113 (58%)
Cochise	20,328	5013 (25%)
Coconino	17,858	2299 (19%)
Gila	7856	957 (12%)
Graham	6269	463 (7%)
Greenlee	1656	0 (0%)
La Paz	2523	1004 (40%)
Maricopa	674,631	141,309 (21%)
Mohave	25,076	2197 (8%)
Navajo	19,085	5990 (31%)
Pima	146,181	11,960 (8%)
Pinal	47,389	3675 (8%)
Santa Cruz	9935	4593 (46%)
Yavapai	26,277	655 (2%)
Yuma	37,521	20,531 (55%)
Total State	**1,116,143**	**207,759 (19%)**

Key Concern Analysis

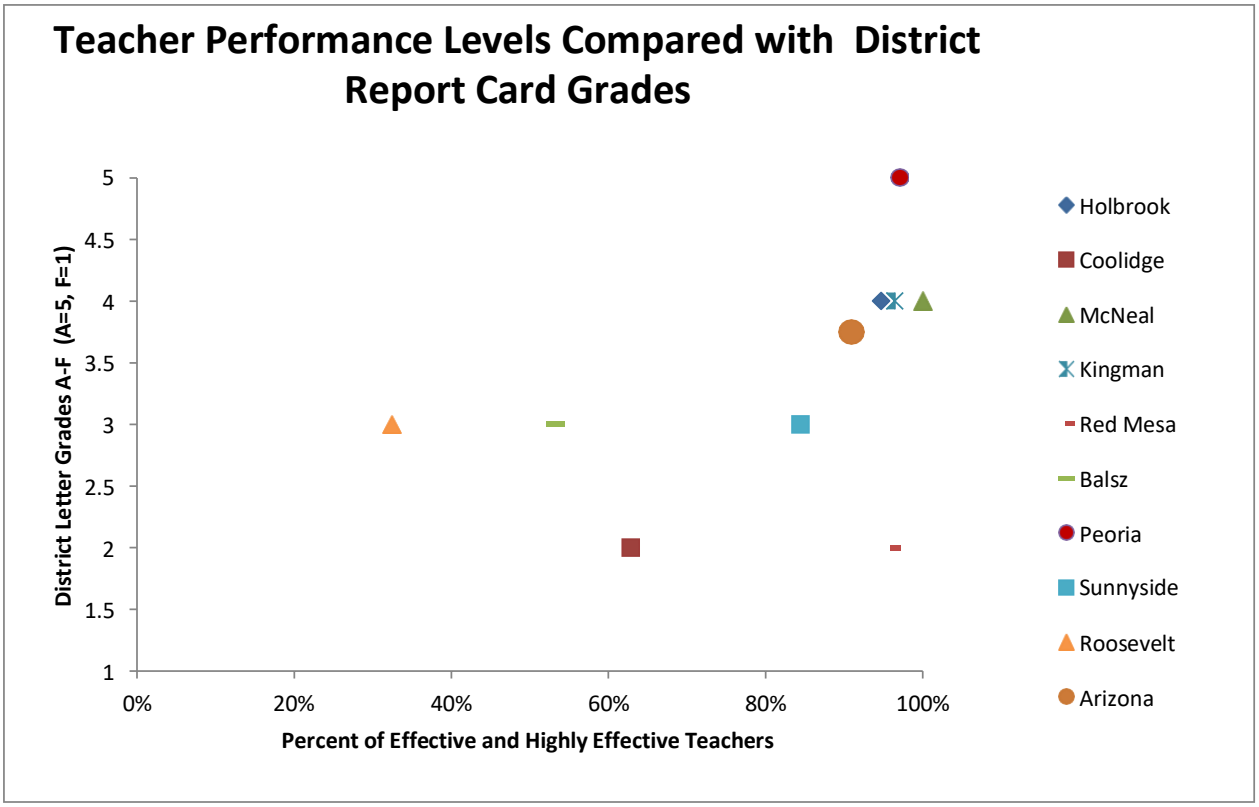
1: Disconnect Between Educator Evaluation Ratings And Student Achievement Prevents Equitable Access.

As the equity gap summary (Table 4) shows, Arizona's highest need students may not necessarily be receiving instruction from the most effective educators. However, that does not necessarily mean these students are not able to have access to more effective educators once a more thorough and unbiased analysis of the ratings system is applied. The self-reported educator

effectiveness ratings from Arizona's LEAs indicate 90.3% of educators are effective or highly effective.[18] But a comparison between the effective ratings and a district's report card grade, which is calculated based on a number of factors including student achievement, indicates the disconnect we know exists but that the data as reported may not support.

An examination of the sample LEAs illustrates this confusion surrounding the current reporting of effectiveness ratings and therefore potentially skews the analysis of how well connected our highest needs students truly are to the most effective instructors (Figure 7). Peoria Unified reports more than 95% of teachers are effective or highly effective and has an overall report card grade of A. This, of course, is to be celebrated. However, Red Mesa Unified also reports 95-100% of teachers in the highest ratings yet has a grade of D. Even the three schools that indicate having nearly 100% top tier teachers only have grades of B (Holbrook Unified, Kingman Unified, and McNeal Elementary). Three districts (Roosevelt Elementary, Balsz Elementary, and Coolidge Unified) demonstrate what is likely the most reasonable scores with grades of C and D and their percentages of the most effective teachers falling somewhere between 32% and 73%.

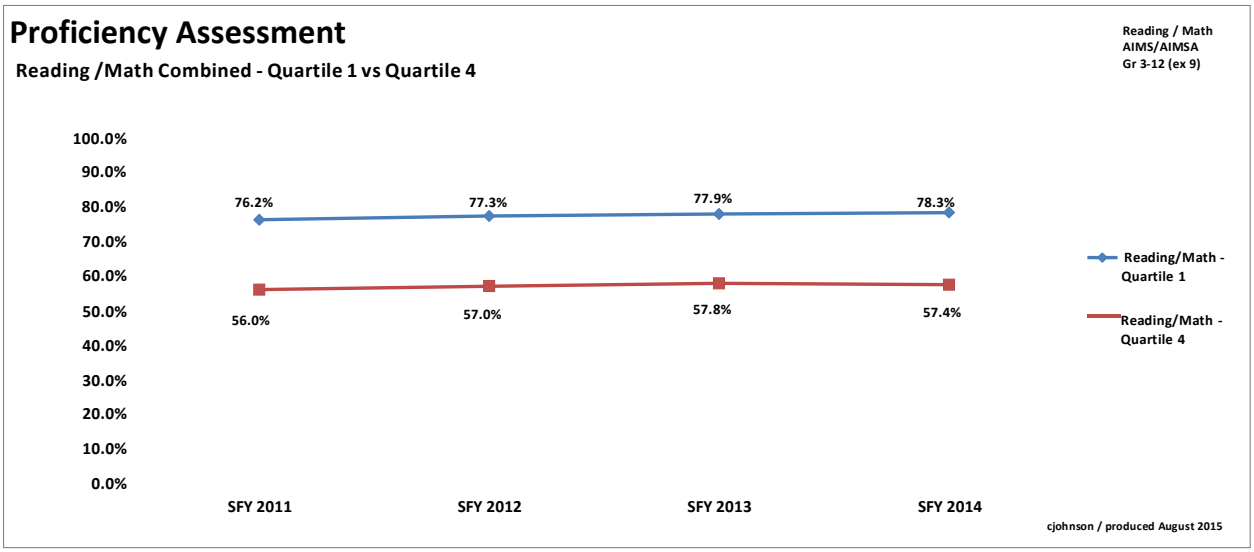
Figure 7



[18] 2013-14 LEA reported teacher effectiveness ratings

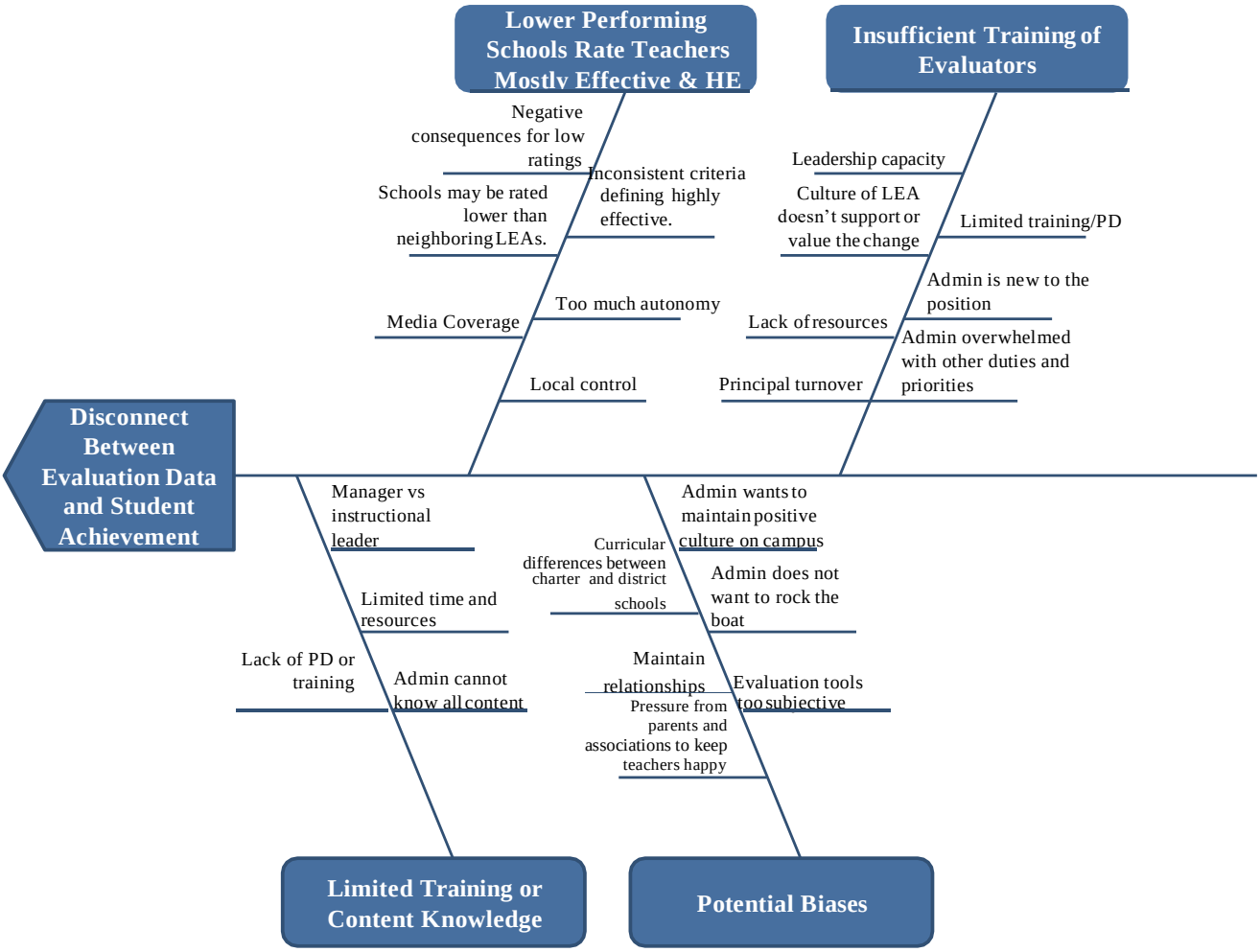
Student achievement data from the state's annual summative assessment further illustrates the confusion. Figure 8 demonstrates four years of math and reading scores for combined grades 3-12. These data are from Arizona's Instrument to Measure Standards (AIMS) for 2011-2014. In 2015, Arizona adopted a new statewide summative assessment known as AzMERIT. This assessment is aligned to the state's adoption of College and Career Ready Standards and scores are available to LEAs in the Fall of 2015.

Figure 8



Given the structure of Arizona's *Framework for Measuring Educator Effectiveness*, there should be a greater correlation between the effectiveness ratings and student achievement scores, regardless of quartile. This is not the case. Stakeholder discussions surrounding the root causes of this Key Concern indicated the following possibilities illustrated in Figure 9:

Figure 9—Fishbone Analysis of Key Concern 1



Additional discussion from the field further illustrates the problem. A recently commissioned and as yet unpublished study conducted by ADE surveyed five districts separately from the nine LEAs mentioned thus far in this report. In those five districts, less than 46 percent of the surveyed teachers agreed that the new evaluation process has benefitted students although 60 percent of the surveyed principals believe that students have indeed benefitted. However, when it comes to using evaluation data to inform human capital decisions, as it is intended, the districts each indicated that teaching assignments are not consistently based on evaluation data but use more informal assignment decisions by school leaders.[19] In addition, less than 50% of administrators in these districts use evaluation data to determine or target professional learning

[19] Cross-case analysis of teacher evaluation data use in Arizona (Unpublished report).

opportunities. These revelations support anecdotal assumptions that the evaluation systems are not used effectively in ways that reflect actual classroom instruction and may not support teacher professional growth which prevents the identification of truly effective teachers who may be able to assist the highest need students. This connects to a possible cause of the equity gaps because LEAs may not be accurately compiling their evaluation results or fully utilizing their resources based on those results. ADE will continue to work with LEAs to gather feedback and reliable data where possible to support human capital decision making.

Furthermore, in order to reduce the opportunity to inflate evaluation ratings, ADE will pursue strategies designed to help school leaders more accurately evaluate their teachers. One such opportunity might be to work directly with districts like Balsz or Roosevelt who appear to have consistent ratings and support their teachers' professional learning in order to improve the skills of those teachers rated as ineffective and developing. Over time, those teachers will rise in their ratings to effective or highly effective and, with a direct correlation to student achievement, will assist their school districts in improving their report card ratings from a C or D to at least a B grade. Students of color or economic disadvantage in these high need districts will then have greater access to effective educators and ADE would then know how to shift such support to other, similar high need areas.

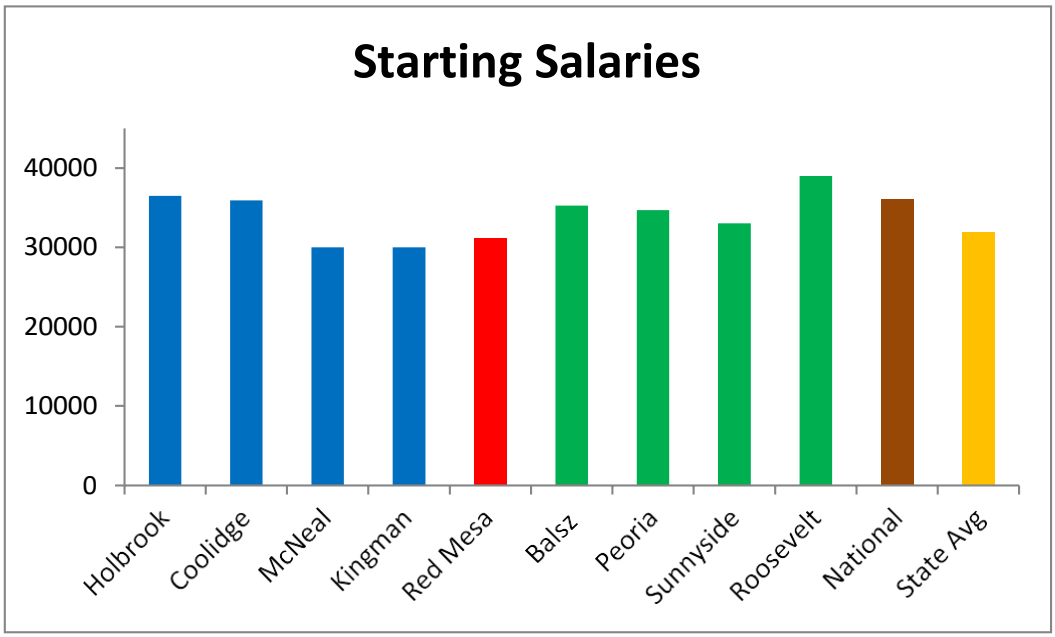
One important finding of the unpublished report does hold a ray of hope and supports one of the proposed solutions to this concern. Officials from all five surveyed districts emphasized the importance of monitoring inter-rater reliability. They indicated principals need additional training to fully understand the observation systems and then be expected to rate teaching practices consistently.[20]

2: Difficulty Retaining and Recruiting Highly Effective Teachers.

Part of the difficulty Arizona sees in connecting students to effective and highly effective teachers is the limited pipeline of teachers with that distinction. As of 2014, Arizona's average starting salary was $31,874, far below the national starting average of $36,141.[21] Figure 5 displays a comparison between our sample schools' starting salaries with those of the state and nation. In 2015 each of the five states that border Arizona raised teacher salaries while, for the most part, Arizona salaries remained stagnant.

[20] Cross-case analysis of teacher evaluation data use in Arizona (Unpublished report).
[21] National Education Association (NEA) Research Estimates Database 2013-2014

Figure 10

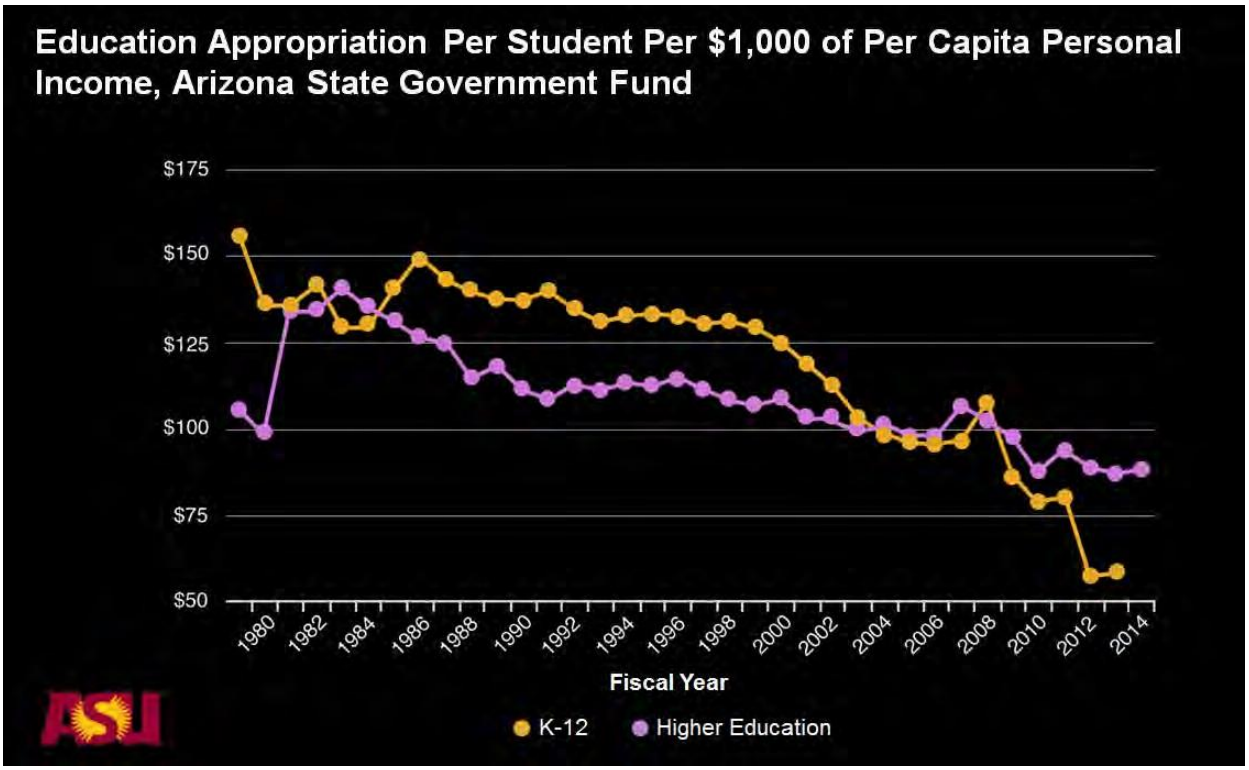


For many years Arizona has continued its trend of cutting education spending, putting per pupil spending at $7,021, far lower than Vermont's $26,000 and the thirty-two other states that spend more than $10,000 per student. This amount moved Arizona's ranking to a solid 50th.[22] An April 2015 presentation by the President of Arizona State University highlighted the drastic state of more than thirty years of budget cuts to Arizona's universities and K-12 schools and is illustrated in Figure 11.[23]

[22] National Education Association (NEA), Ranking of the States and Estimates of School Statistic, 2013 www.nea.org/54597.htm

[23] Crow, M. (2015, April 30). Arizona's Economic Imperative: Leading the Nation in Latino Student Success. A Community Conversation.

Figure 11



Arizona Joint Legislative Budget Committee, U.S. Department of Education, National Center for Education Statistics and the U.S. Department of Commerce, Bureau of Economic Analysis

In November of 2013, the Arizona School Administrators (ASA) conducted a survey regarding teaching vacancies. Of the seventy-nine districts who responded to the survey, 62% reported having open teaching positions within their schools and over 900 positions filled by substitute teachers. Additionally, 53% reported having up to five teachers break a contract or resign during the school year. Many of these reported seeking higher pay in professions outside education as the reason for leaving the classroom.[24]

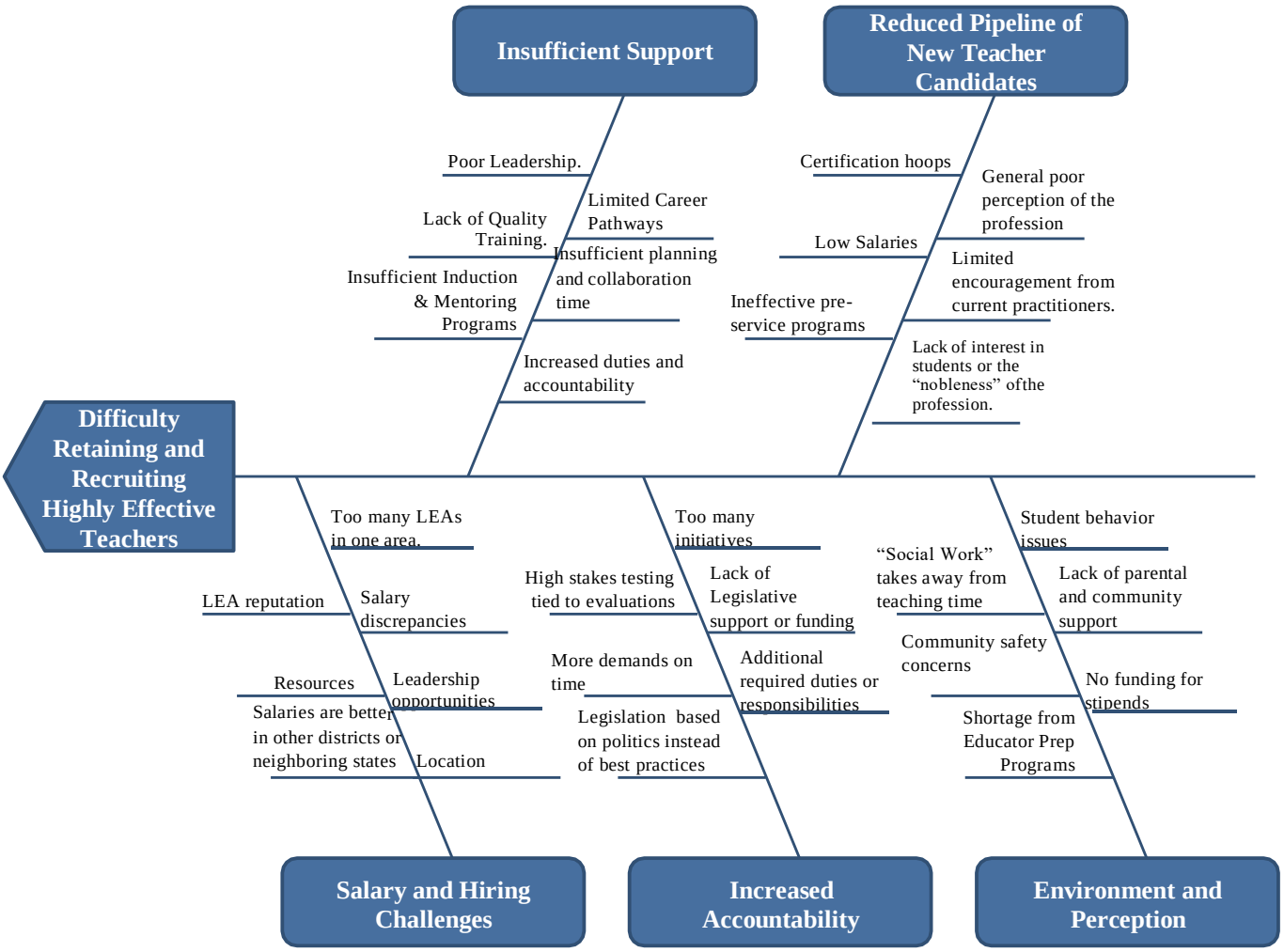
Arizona is also experiencing a decrease in the number of people entering the teaching profession with State Board approved educator preparation programs in 2013 reporting a 7% decrease in enrollment from the previous year. In Arizona, 29% of teachers had three or less years of experience as of the 2013-2014 school year. During this same school year, 24% of first year teachers and 20% of second year teachers left their positions and were not reported as teaching in Arizona.[25]

Salary concerns, coupled with school culture issues, limited leadership capacity, perceived certification difficulties, limited resources, limited or no support such as a mentoring

[24] Arizona Department of Education (ADE), Educator Retention and Recruitment Task Force Report, January 2015.
[25] Ibid.

program and the perception of the profession in general have all contributed to a reduction in the number of people pursing teaching as a career, either through traditional university coursework or through alternative pathways. Schools in Quartile 4 of both the poverty and minority categories are finding it particularly difficult to retain and recruit highly effective educators. Discussions surrounding the root causes of this Key Concern indicated the following possibilities illustrated in Figure 12:

Figure 12--Fishbone Analysis of Key Concern 2



Clearly, the difficulty of retaining and recruiting highly effective teachers to all schools, much less the state's highest need schools, is a cause connected to the calculated gaps as LEAs struggle to find candidates even when searching for those that may be the most effective. Often schools end up filling their empty classrooms with long-term substitutes or, in some cases, do not fill the space at all which results in higher class sizes.

3: Negative Perception of the Profession.

There has been much discussion surrounding the professional of education. In particular, editorial commentaries and research have focused on the professionalism and training of teachers, the lack of respect current society now pays toward education in general, and the lack of appropriate funding to guarantee today's students are prepared for the future with a high quality level of education as compared to other countries. Education consultant Jamie Vollmer has referred to the current public perception of education, fueled by a variety of sources, as "the practice of bashing public schools as a blood sport." He says that the media does not publish the full story, statistics are skewed and used out of context, and incorrect comparisons are made between the past and present.[26] Unfortunately, this public "bashing" and misinformation, often at the legislative and congressional policy levels, has caused many would be educators to shift their focus to other, lower profile professions. There is considerable anecdotal evidence that some current educators have tried to dissuade a student from becoming a teacher or, at the very least, have been less than enthusiastic in their support.

Some of the in-profession discouragement stems from low salaries and policy implications. Continual budget cuts from the state have prevented districts from providing salary increases. This is something Yuma Union High School District Superintendent Toni Badone said in 2014 was, "a morale buster. The disregard for teachers has been demoralizing. The continued de-valuing of the education profession through lack of funding translates into our finding fewer teachers. We struggle to find teachers in science, mathematics, English and special education."[27]

Cave Creek Unified School District responded to the deep budget cuts by cutting 24% of its administrative team, implementing furlough days for district office staff, and closing a middle school.[28] The district implemented many other drastic cuts as well in attempts to maintain academic service and teacher salaries.

In July 2014, the Arizona Legislature was ordered by the state's Supreme Court to raise the K-12 per pupil base level funding to reflect inflationary increases and pay back LEAs for what they should have received over the years that the Arizona Legislature did not fund inflation. This is roughly $1.6 billion over five years. The state appealed the ruling. Dr. Frank Davidson, superintendent of the Casa Grande Elementary School District, said the funding cuts contribute to a teacher shortage: "The greatest impact of the Legislature's decision to not provide the statutory base support level has been to reduce our ability to attract and retain instructional staff."[29]

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[26] Jamie Vollmer, "Public School Bashing: A Dangerous Game", American Association of School Administrators, September 2010.
[27] Superintendents describe funding failure's impact on students. July 23, 2014.
[28] Ibid.
[29] Ibid.

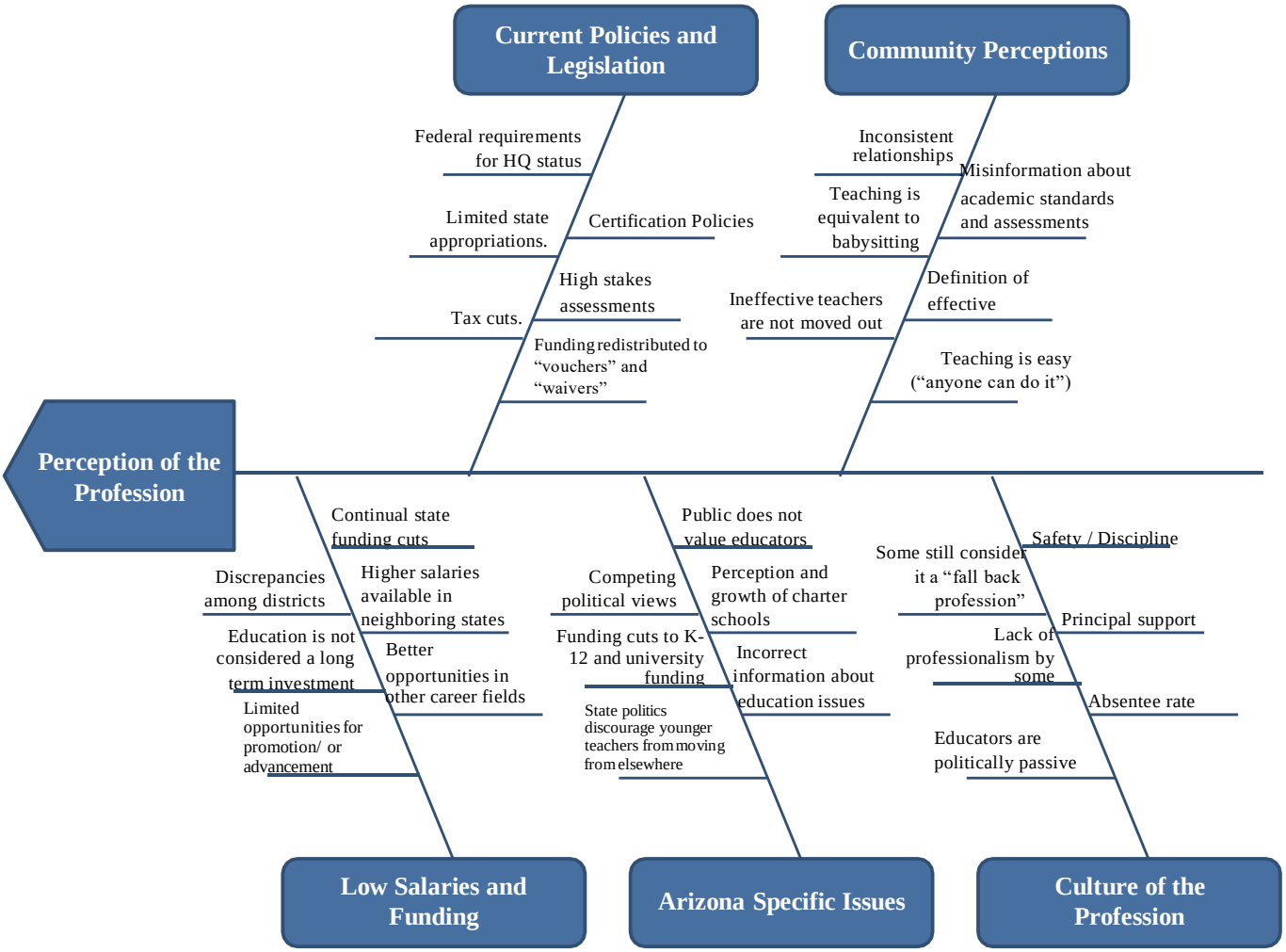
It has become increasingly difficult to retain or recruit effective teachers across the state, but particularly in the highest need schools. The state's public universities report as much as a 26% decline in enrollment in their colleges of education while some districts, including those in southern Arizona, are reporting as much as a 19% annual turnover.[30] One reason for this high turnover, according to a teacher in Sunnyside Unified is a lack of respect for the teaching profession. A spring 2015 survey conducted by Tucson Values Teachers listed respect as a key issue for teachers who felt the public respects their profession less than virtually every other profession and occupation with the exception of five: travel agent, child-care worker, stay-at-home parent, retail sales clerk and driver.[31] Asked whether they would recommend the profession to their children, 56% of teachers in the survey said no and 67% of those respondents cited lack of community respect as the biggest reason to dissuade children from becoming teachers.[32]

There are internal stressors as well including a high level of performance accountability based predominately on high stakes testing. The increase in the number of charter schools in Arizona has increased the emphasis on quality instruction with district schools as more and more parents exercise their school choice rights. Teachers are also faced with overwhelmed administrators who are not able to provide sufficient support and may not have the necessary training to coach and guide instructional practices. Finally, there is a subset of teachers, administrators and parents who still perceive the profession as a fallback career where "anyone can be a teacher and get their summers off." This general lack of professionalism, even from just a few, is very tiring for competent and effective educators and can have a devastating impact on morale.

Discussions surrounding the root causes of this Key Concern indicated the following possibilities illustrated in Figure 13:

[30] Shortage puts uncertifiedteachers in Arizona classrooms. August 1, 2015.
[31] Ibid.
[32] Ibid.

Figure 13--Fishbone Analysis of Key Concern 3



Similarly to concern #1, the issue of the perception of the profession causes administrators to fill classrooms with, at best, long-term substitutes or move teachers to areas where they are not highly qualified. The worst case scenario is not having an applicant to fill the vacancy at all resulting in higher class sizes and greater stress on the remaining staff. Each of these solutions is detrimental to the education of all students, notwithstanding the impact on our highest need populations.

The next step in this process is to define and prioritize strategies that ADE believes will close the calculated equity gaps. Outlined in Section 4 is a series of performance objectives and proposals guided by three overall goals that will be the data-driven benchmark for progress

(Table 15). The strategies are prioritized to address the areas that we believe will have the greatest impact on the equitable access issue for both high poverty and high minority students:

1. Strengthen the rating reporting system to provide more reliable data surrounding teacher effectiveness and train administrators on the use of such data. This will allow administrators and teacher leaders to target professional learning opportunities as well as review systems in order to assign the most effective educators in ways that provide the greatest access to the highest need students.

2. Reduce the number of inexperienced teachers by employing effective retention and recruitment strategies. By introducing research-based mentoring and induction programs for beginning teachers, targeted professional learning, and incentives for improved practice, opportunities for students to access effective instruction will increase.

3. Provide incentives for teaching in high need areas. Such incentives could include salary increases, social support programs, housing allowances, teacher-leadership opportunities, improved administrative/leadership support, and assistance to schools to develop a collaborative community of learning. These incentives will draw the most effective teachers who still have a passion for the profession and who are willing to do the extra work or to drive the extra miles necessary to connect with our highest need students in our most remote or challenging schools.

Section 4: Strategies for Addressing Equity Gaps

Arizona is committed to the ideal that all students have access to excellent teachers. The state's 2006 equity plan is part of this commitment, ensuring that all students are taught by a highly qualified teacher in every core content classroom. The 2006 plan resulted in 99% of core content classes in the state being taught by highly qualified teachers.[33]

Since 2006, the focus for how we define excellent teachers in the classroom and educators in schools has shifted from highly qualified to highly effective. We accept that all teachers should be well prepared and qualified to serve in the classroom. Highly effective teachers provide students access to more effective and individualized instruction which promotes the ultimate goal of increased learning and improved achievement. By ensuring equitable access to effective instruction we can actually improve the quality of education for all students.

[33] Arizona Department of Education, *Highly Qualified Teachers Equity Plan 2006*

Table 15--Goals

	Economically Disadvantaged	Students of Color	By 2018	By 2020
Inexperienced Teachers	10.6%	11.8%	Reduce by 50% the number of students with access only to Inexperienced teachers.	Reduce by 100% the number of students with access only to Inexperienced teachers.
Teachers Rated as Developing or Ineffective	7.4%	6.3%	Reduce by 50% the number of students taught by only developing or ineffective teachers.	Reduce by 100% the number of students taught by only developing or ineffective teachers.
Out of Field / Unqualified Teachers	-.7%	3.5%	Reduce by 50% the amount of students of color receiving instruction from an out of field or unqualified teacher.	

Table 15 illustrates long-term goals to eliminate equity gaps and interim targets towards that goal.

Based on the data presented in Tables 2, 3, 4, and 5, ADE verifies that Arizona students in poverty and students of color have more limited access to effective teachers than the counterparts in a higher socio-economic quartile. We predict those students will continue to have inequitable access to effective instruction. The following theory of action will guide the strategies to mitigate this problem.

Theory of Action

If *educator performance evaluation systems are implemented with fidelity and a greater understanding of how scores are calculated and can be improved, and*

If *implementing a comprehensive yet individualized approach to educator retention and recruitment is supported at the state level and adjusted periodically as needed, and*

If *the perception of the profession can be improved in such a way as to attract more traditional and nontraditional applicants to the workforce,*

Then *Arizona school districts and charters will be better able to retain, recruit, and develop* excellent *educators so that all students, especially students of color and economic disadvantage, have equitable access to* effective *instruction and leadership to help them achieve their highest potential in school and beyond.*

The state, through its partners and individual LEAs, has made progress in ensuring that teachers do not teach outside their area of certification and developed a variety of programs to increase teacher content knowledge and professional training including:

- online trainings and videos of effective instruction,
- professional development leadership academies,
- statewide initiatives surrounding pay for performance and career ladder,
- prioritized technical assistance from ADE,
- the establishment of master teacher mentor programs,
- standards and models for effective induction programs,
- the granting of an Associate of Arts in Elementary Education (AAEE) at the state's community colleges to help provide a pathway for future educators toward an Educator Preparation Program at the state's public universities,
- promotion of a teaching intern certificate,
- assistance and subsidies for teachers to complete National Board certification,
- recognition of excellent teaching through programs such as the Rodel Exemplary Teacher award, and
- The support of leaders in high poverty, high minority schools through collaborative programs designed to enhance leader effectiveness.

Following the 2006 submission of its Equity Plan to USED, ADE conducted an equity study with twenty-five districts and over eighteen months focused on four initiatives Arizona that included statewide efforts on recruitment, preparation, and retention of Highly Qualified (HQ) teachers, supporting leadership in high poverty and minority schools, providing for statewide HQ policy coherence, and technical assistance and monitoring. The state also set a goal to implement two new data systems to assist with monitoring and support. The first, Arizona LEA Tracker (ALEAT) is an electronic portal where districts can upload any necessary information the SEA may ask for including continuous improvement plans. The second data system is an improved web based application to gather and report information on the status of Highly Qualified Teachers. Both data systems were established and have been effective tools for ADE for years.

A statewide task force was created in 2014 to address the general teacher shortage in Arizona. One charge of the task force is to investigate strategies for filling the large number of teaching positions open in the state currently being filled by substitute teachers who may not be highly qualified or instructionally effective, or both. Another charge is to look at methods for retaining the numbers of highly effective teachers that currently exist. Members of the task force are hearing from stakeholders across the state that they need certified teachers to fill these

positions, but they also need to look for effective teachers to fill these positions. The state is faced with the quandary of wanting highly effective teachers in each classroom balanced with the reality of not having sufficient numbers of teachers, regardless of quality, in the employment pipeline.

Other strategies that have been examined include establishing "grow your own" programs in rural, remote and reservation districts. There have also been considerable efforts put in to encouraging classroom aides or paraprofessionals to become teachers. The state is encouraging the use of an intern certificate where teachers without an education degree can be provisionally certified and begin teaching while taking the appropriate coursework for a standard certificate that indicates a highly qualified status.

In October 2015, Arizona Superintendent of Public Instruction Diane Douglas unveiled her plan to provide quality education to all students. With over forty proposed solutions, her plan addresses a wide variety of issues facing education in Arizona. Three proposals, however, tie directly to the work listed in this plan:

1. Funding: Immediately allocate $400 million dollars from the state's general fund this fiscal year, and every year thereafter, to support higher teacher salaries and the hiring of additional teachers.
2. Induction and Mentoring: Encourage all Arizona LEAs to adopt support programs that give new teachers the help they need to grow, succeed and stay in the classroom.
3. Professional Learning: Design a series of trainings in multiple formats designed to provide teachers with information they need.[34]

In addition to the work conducted by ADE, Arizona's universities are building closer ties to the LEAs. Arizona State University instituted a yearlong student teaching residency known as iTeachAZ which is wildly popular among districts around the state because they can easily identify and offer early contracts to promising teacher candidates. Grand Canyon University provides support to struggling new teachers with additional training and outreach if contacted by the teacher or their current principal or superintendent.

At the local level, flexibility in hiring practices for principals of high poverty and/or high minority schools (including priority in the selection of new hires), early access to candidates and postings of positions, and use of Title II-A federal grant funds will be promoted. At the state level, current practices involving allowable use of Title II-A federal grant funds will be reviewed to create new funding sources for recruiting new teachers and principals.

[34] AZ Kids Can't Afford to Wait! (2015)

Details of the Key Concerns Strategies

1: Ongoing professional training for administrators and evaluators

We believe that the current teacher and principal evaluation systems used across Arizona have not had sufficient time to mature with practice and that current self-reported scores may not necessarily be an accurate depiction of classroom instruction. Some schools in Arizona with C, D or F labels still report having a majority of effective and highly effective teachers. There should be a correlation between the two levels but that is not currently seen from all districts. Such a correlation will help LEAs make better staffing decisions and provide targeted professional learning opportunities in order to close the equity gaps.

Root-Cause Analysis Findings

- **Lower Performing Schools Rate Teachers Mostly Effective and Highly Effective.** Schools and teachers may face negative consequences for low ratings, schools are competing with neighboring LEAs and cannot afford a lower rating, and negative coverage in the media, coupled with factors among the school culture may drive this data point.
- **Insufficient or inadequate training of evaluators.** Limited leadership capacity, limited training, lack of training resources and oversight, combined with a culture that may not support the changes called for in a new evaluation system may drive this data point.
- **Limited content training or knowledge of evaluators.** Most administrators are trained as managers, not instructional leaders, there is limited time and resources and the evaluator cannot be expected to know all contents at all grade levels, although they should be able to recognize good pedagogy regardless of the content or grade level.
- **Inconsistent definitions of "Highly Effective."** Even though they are guided by definitions in the state's framework for educator evaluations, Arizona districts are free to develop their own definition and measurement of effectiveness.
- **Varying use of instruments.** Districts are free to use the evaluation instrument of their choice. ADE believes that most districts are using the Danielson model but districts are not required to report the tool used so ADE does not have specific quantitative data to back up its assumption.

Performance Objectives

- **By January 1, 2016, ADE will publish a calendar of professional learning opportunities to support administrators in effective implementation of their LEA's observation/evaluation instrument.**
- **By June 30, 2016, ADE will develop a plan to support LEAs in conducting a gap analysis to assist with the alignment of their educator evaluation instruments and evaluation training for administrators and teachers.**

- **By June 30, 2017, twenty-five percent (25%) of Arizona LEAs will have conducted district-level Human Capital Management Systems (HCMS) policy scans and gap analyses to gauge the comprehensiveness and alignment of their educator effectiveness policies, with the assistance of an ADE team if needed.**
- **By June 30, 2018, seventy-five percent (75%) of Arizona LEAs will have conducted district-level Human Capital Management Systems (HCMS) policy scans and gap analyses to gauge the comprehensiveness and alignment of their educator effectiveness policies, with the assistance of an ADE team if needed.**

General Strategies Suggested by Stakeholders

1. Provide specific guidelines for defining teacher effectiveness. Such guidelines could include examples of instruction and student achievement at each effectiveness level, or a form of measurement to determine the overall effectiveness of an observation instrument.
2. Provide enhanced professional learning opportunities for administrators and evaluators with sufficient practice time prior to the start of the evaluation process.
3. Provide additional guidance and support in the choice and implementation of an effective observation tool and data collection instrument.
4. Implement a reporting tool to improve data reporting, analysis, and validity.
5. Develop and present, either in districts as requested, in person at ADE, or via webinar, opportunities to learn the components of an effective evaluation tool and how to implement it with fidelity in the field.
6. Assist LEAs with information and guidance on evaluation instruments and data reporting systems. Encourage LEAs to participate with ADE in collaborative purchasing of Teachscape.
7. Develop a rubric to assist LEAs in measuring the effectiveness of their evaluation instrument.

Measurement Tools

- Survey of states and LEAs for definitions of excellent, effective, and highly effective.
- Attendance logs for ADE-presented professional learning opportunities.
- Increased number of subscriptions to Teachscape.
- Effective evaluation instrument measuring tool –developed, implemented and LEAs participate in training.
- Development of Arizona LEA Tracking (ALEAT) to accept effectiveness ratings.

2: Human Capital Management Systems for Teacher Retention and Recruitment

We believe every student deserves a highly effective teacher and every school deserves an effective leader with systemic continuity. We believe that increasingly consistent and meaningful support for all educators will result in higher retention and recruiting results. We believe that systems need to be established to draw the right candidates into traditional and nontraditional career pathways, support the candidates through effective induction and mentoring programs, increase salaries, increase the opportunities and resources available for teachers to work in hard to fill subjects and hard to fill areas.

Root-Cause Analysis Findings

- **Insufficient Support.** Teachers report the impact of increased accountability with reduced support. Such support may include reduced funding for resources, reduced leadership capacity, lack of mentoring/coaching, and training or professional learning is not aligned to an individual teacher's actual needs.
- **Reduced pipeline of new teacher candidates.** The decrease in teachers in traditional educator preparation programs as well as non-traditional programs such as Teach for America or Troops to Teachers has put an additional burden on already crowded schools facing an increasing shortage of teachers as the current workforce reaches retirement age.
- **Working conditions.** Limited legislative financial support results in some cases in a decrease in maintenance and upkeep for schools causing blight and unsafe working conditions. Teachers also report being unprepared for and not supported with societal issues that students may bring from home and are out of the teacher's locus of control.
- **Salary increases in neighboring states, completion with neighboring districts and charter schools.** Each of the states bordering Arizona provided pay raises to teachers in 2015 while Arizona continues to reduce its education funding. Districts in Yuma, Bullhead City and Kingman report losing teachers to San Diego, Laughlin and Las Vegas as those communities pay considerably more. Schools in rural areas find it difficult to retain or recruit candidates and often lose their "home-grown" teachers to Tucson and Phoenix whose districts pay more and there are greater opportunities in the larger urban setting. Lower performing districts, with limited resources to improve, may lose highly effective teachers to a neighboring, higher performing charter school.
- **Limited incentive to serve in hard to fill content areas.** Through grant funding some districts are able to provide stipends or incentives for teachers to work in hard to fill content areas or at lower performing schools. However, those hard to fill areas also face other challenges and the support may not be available to completely incentivize an effective teacher to move there.
- **Leadership pathways.** Limited pathways exist for professional advancement for those who desire to provide leadership yet want to remain in the classroom rather than take an administrative position or seek employment at a university, government agency or consulting firm.

- **Overall perception of the field.** The pipeline of effective teacher candidates is shrinking due to state and national perceptions of the profession. Teachers may not be politically active or savvy enough to help inform conversations. Some teachers may even discourage future candidates from joining the profession. Parents and legislative officials may not have a complete understanding of issues. Societal pressures and media scrutiny often paint the profession in a negative light causing some potential candidates to rethink their career path.

Performance Objectives

- **By June 30, 2016, ADE Certification Unit will have online application services available for all new certification and re-certification applicants.**
- **By June 30, 2017, ADE will collaborate with Arizona higher education institutions, parent associations and community organizations to develop plans and incentives for promoting the profession and increasing the number of candidates seeking certification.**
- **By June 30, 2017, all districts will address professional learning with an emphasis on retention opportunities, support for improved climate and culture and individualized training based on need in the LEA and School Continuous Improvement Plans.**
- **By June 30, 2017, ADE will partner with LEAs, outside agencies, parent associations and community organizations to develop a legislative awareness program for implementation in SY 2017-18.**

General Strategies Suggested by Stakeholders

1. Provide greater professional learning and support through mentoring/coaching for all leaders, including superintendents, principals, school level instructional coaches and classroom teacher-leaders.
2. Implement a new teacher/new leader induction and mentoring program that lasts the full year, has research-based, job-embedded learning opportunities, sufficient funding for stipends and sustainability and networking opportunities.
3. Continue to align purposeful professional learning opportunities. Give LEAs the tools to analyze their own effectiveness or partner with an outside agency for resources.
4. Develop a leadership alliance to model, network, support effective district and school systems.
5. Increase Salaries – Make teaching a viable career to keep them in the classroom.
6. More collaboration between state universities/institutes and LEAs and other state education departments in terms of evaluation - measurement would be teacher evaluation.
7. New administrators and teacher-leaders participate in AZ LEADS leadership coursework or Teach to Lead initiative. Develop refresher course for current leaders.
8. Assist LEA leadership in creating a culture of support.
9. Advocate for increased school funding.

Measurement Tools
▪ Leadership improvement plan with objectives, data and quantitative/qualitative measures. Use a 360° tool such as VAL-ED.
▪ HCMS self-assessment.
▪ Parent, student, and staff surveys.
▪ Classroom observation/evaluation instrument.
▪ A reporting system that demonstrates the correlation between educator evaluations, student achievement, and the overall school grade.
▪ Compensation analysis.

3: Change the perception of the profession

We believe that current legislative decisions, reduced funding with greater accountability, media scrutiny, and societal perceptions have produced a negative perception of the education profession causing additional challenges to retaining and recruiting highly effective educators and leaders.

Root-Cause Analysis Findings
▪ **Current policies and legislation.** Increased LEA oversight, opportunities for improved charter wait lists and school choice, and scrutiny of state government have led to misinformation, miscommunication and negative impressions of the teaching field both inside and outside the profession.
▪ **High stakes accountability.** Schools are increasingly held accountable for student learning with limited funding while outside societal influences on education remain beyond an educator's control.
▪ **Reduced school funding and salaries not competitive with private industry.** Arizona leads the nation in the rate of funding cuts to both K-12 and post-secondary institutions and salaries have not kept up with neighboring states even after the economic recovery. This leads to fewer people entering the field and more teachers and leaders choosing to leave the field in order to support their families or have greater opportunity for advancement.
▪ **Internal culture of the profession.** "Teachers are our own worst enemy," said one town hall participant. Teachers are not often not politically savvy or active, do not understand policy decisions and some may try to dissuade students and family members from entering the profession. Teachers are also held to higher standard by the community and media so when one chooses to make a poor decision, the news reflects badly on everyone.

- **External perceptions of Arizona.** The state is an attractive place for new teachers, particularly those from the Midwest and east coast, to seek jobs. Its climate, beautiful natural environment, abundance of sports and cultural opportunities and top quality institutions of higher learning make it an ideal place to start a new job. However, the state's unique politics, low pay, and lack of support systems cause many to leave after only two or three years and either return to their home states or seek jobs in states that pay more and provide the necessary professional supports.

Performance Objectives

- **By June 30, 2016, ADE will investigate ways to increase the positive perception of the education profession by working with parent groups, state business leaders, education groups, and other interested parties to create a marketing plan highlighting the positive characteristics of teaching and education in general in Arizona targeted toward high school students and the general public through social media.**
- **By November 1, 2017, ADE will seek sponsorship for legislation that creates a competitive market for teachers in Arizona by reviewing the current funding formula in order to increase teachers' salaries to the national average over a three year period. This bill will also support research-based professional learning and incentivize pursuing National Board Certification.**
- **By June 30, 2017, ADE will reduce by ten percent (10%) the number of teachers leaving the profession in their first two years by working collaboratively with representative LEAs from large and small districts and charter schools to create a Beginning Teacher Mentoring Model that will be available to all LEAs in the state. This model will include recognized best practices in mentoring and funding options for mentor stipends.**
- **By July 1, 2017, ADE and institutes of higher education will develop a research based teacher leadership program.**

General Strategies Suggested by Stakeholders

1. Foster a collaborative environment with local business community leaders.
2. Increase teacher salaries through a dedicated legislative appropriation in order to meet or exceed national averages within three years.
3. Increase per-pupil funding through the development of a new funding formula.
4. Develop and implement an effective one to two yearlong mentoring/coaching and induction program with sufficient funding for incentives, stipends, and resources.
5. Improve university supported training of "Master Teachers" for student teachers/interns including a rigorous selection process and funding for stipends.
6. Legislative authorization and funding for career-ladder style opportunities to encourage teacher-leaders to remain in the classroom and increase overall awareness of effective, data-driven instructional best practices.
7. Legislative appropriations for National Board Certification and dedicated funding for professional learning.

Measurement Tools
▪ Survey of social, print, and visual media to determine the messages currently being delivered.
▪ Audit of current "Master Teacher" training, professional learning opportunities, and stipend amounts.
▪ Legislative appropriation trends and funding sources.
▪ District exit surveys.
▪ Public perception surveys conducted by third party research groups (IHEs, local research groups, WestED).

Section 5: Ongoing Monitoring and Support

Arizona is committed to ensuring the long-term success of this initiative. ADE believes this should be more than just a compliance document but an opportunity to support individualized equity plans with research-based strategies without infringing upon local control. Doing this will create a collaborative environment that will help alleviate the current retention and recruitment crisis.

Supporting individualized equity plans will afford ADE the opportunity to provide guidance and professional development to help LEAs shift from a "compliance culture" to an "equity culture" which establishes policies, practices, systems that enable all stakeholders to view staffing decisions through the lens of equitable access to experienced and effective teachers for all children every day in every classroom. This "equity culture" will guide principals in their teacher recruitment, induction, development, retention policies/practices and support LEA governing board members in making the difficult, but necessary decision to reallocate resources to directly address and maintain equitable access for students of color and economic disadvantage.

ADE will assist LEAs through the use of Title I, Part A and Title II, Part A funds for all schools but particularly those identified in the Fourth Quartile of poverty with the greatest need. In addition, ADE will continue to provide opportunities to help ineffective and developing teachers move upward on the effectiveness scale. Much of the responsibility from districts will be in the form of voluntarily submitted data that will assist ADE in providing targeted support. The benefit to a timely submission of data will be the quick access to technical support, guidance and available funding for programming. One potential strategy is to use the current online school improvement tracking tool known as ALEAT as a mechanism to receive evaluation

ratings and other data to help ADE more easily gather and analyze the information to provide targeted support to the strategies outlined above.

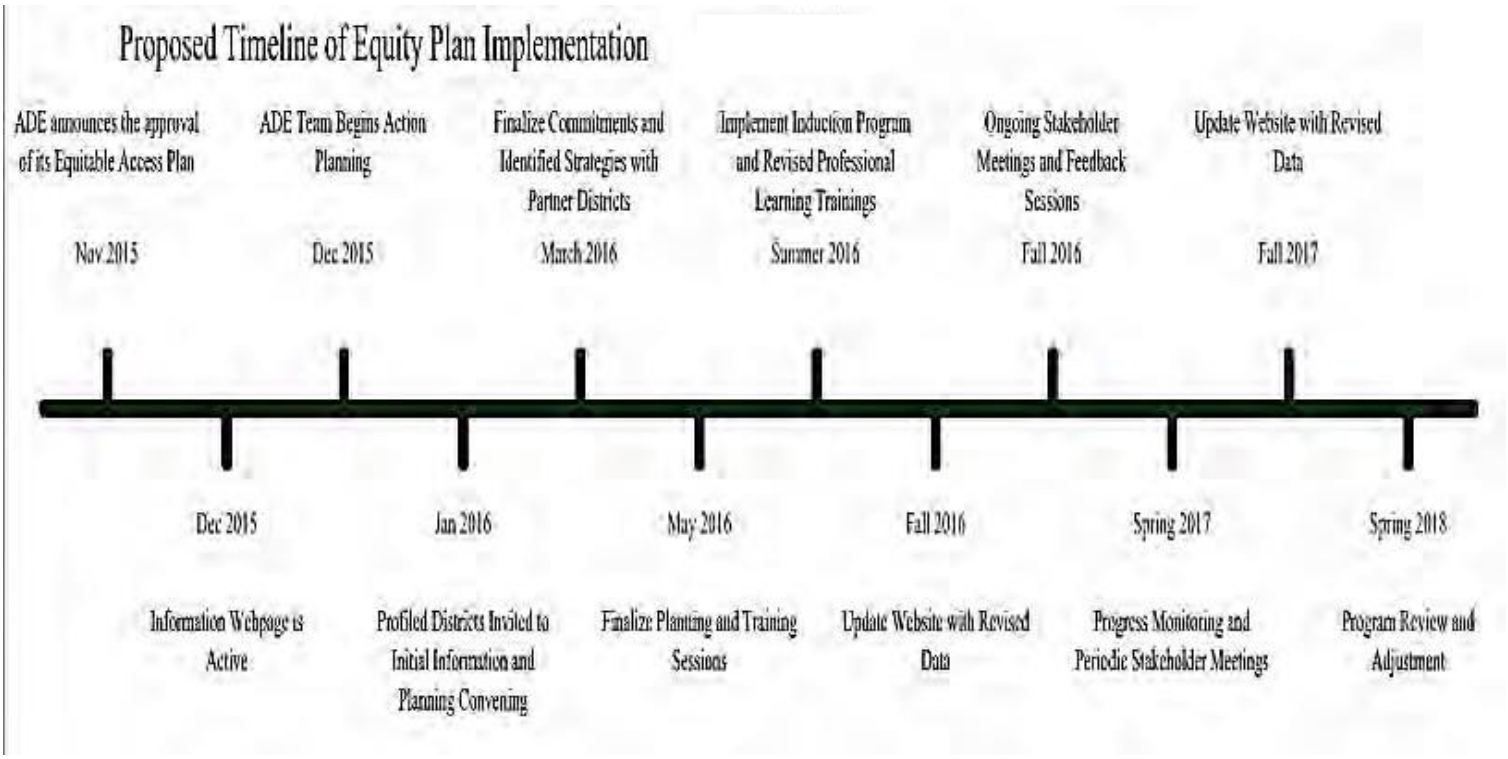
ADE is also committed to the leadership development of highly effective principals, assistant principals, district office administrators, and superintendents coupled with support for LEA research-based new teacher induction and development programs grounded in best practices.

Public reporting of this project will consist initially of information posted on the agency's website. The ADE team meets regularly with various Communities of Practice who are made up of various community leaders, experts, and practitioners. The small group structure of these communities allows for quick dissemination of information and interactive opportunities to respond to questions and concerns. The team will continue to use these communities to update district leaders and the community on its progress.

Following the submission of this report in the summer of 2015, ADE staff will reconvene to examine any feedback from USED and continue to develop a thorough program evaluation that includes objectives, measures, and metrics to evaluate the outcomes. Staff will continue to collaborate with colleagues in other State Education Agencies to determine best practices and workable solution and work collaboratively through the network of Integrated Support Teams.

ADE staff will identify specific partners to assist with development and implementation of the strategies. Such partners may be parent and student organizations, teacher and leader associations, LEAs, colleges and universities, business and political leaders, community action groups, the media, and staff from other government agencies in Arizona and in other states. ADE's executive leadership will assist the process by providing the vision necessary to carry plans forward and guidance as necessary to problem solve and assist with budgetary considerations as they arise.

While most of the performance objectives are realistically spread out over the next two school years and legislative sessions, it is important to note that it will take time for the data on the proposed programs to mature enough to show how effective a strategy may be. Not only will ADE staff monitor progress toward the realization of the performance objectives but will continue to examine measurements at regular intervals over the next three to five years. It may be necessary in the future to develop a working group to oversee equity issues, examine data, determine the need to revise goals, develop new strategies and keep the conversation focused on effective instruction that supports the achievement of all students.



Section 6: Conclusion

ADE supports the U.S. Department of Education's goal of ensuring that every student has equitable access to excellent educators and is proud to present this plan for advancing the educational opportunities for students across the state. ADE recognizes that Arizona's educators are the most important component of success for Arizona's students and is committed to the goal that students of color, students in economically disadvantaged areas, and students with special needs are not taught by inexperienced or ineffective educators at higher rates than students outside those demographics. ADE further recognizes that leadership is an equally important component of a quality education and also seeks to meet a goal that schools with students in the previously mentioned underserved populations are not led by unqualified or ineffective administrators.

Following up on its 2006 Equity Plan for Highly Qualified Teachers, ADE submits this plan to continue to keep the conversation going about student achievement and educator effectiveness. This current plan reflects research, extensive outreach to the community, and thoughtful deliberation about actions that most likely will enable our schools and districts to chart a course toward success.

It is important to note that by examining the need for equitable access to effective educators for students in underserved populations, ADE is actually looking at how to expand access to effective and highly effective instruction for all students. An examination of the data contained in this report clearly demonstrates the variety of challenges facing the state's education system including an ongoing teacher shortage that has reached crisis levels and is really at the heart of connecting an effective educator with all students, not just those of color or high poverty status or with special needs. The agency seeks to stem the outflow of teachers from the profession and increase the number of effective candidates into the profession as its overarching goal to solve any perceived equity gaps. Summaries of town hall meetings with stakeholders are listed in Appendix B.

The ADE theory of action provides a clear goal for a supportive plan that will assist LEAs with the ongoing issues surrounding retention and recruitment of effective educators as well as the access students of color or of low economic status have to those effective teachers and leaders. ADE sees this as an opportunity to provide targeted assistance in such a way that will encourage LEAs to develop their own strategies unique to their own demographic and political needs. Arizona looks forward to proceeding with this plan.

Appendix A. ADE Research and Support Team

Name	Title	ADE Division or Section
Dr. Cecilia Johnson	Associate Superintendent	Highly Effective Teachers and Leaders Division
Dr. James Buchanan	Deputy Associate Superintendent	ECAP and Leadership Development
Angela Denning	Deputy Associate Superintendent	Exceptional Student Services
Dr. Mark Francis	Deputy Associate Superintendent	Arizona Charter School Program
Dr. Carrie Giovannone	Deputy Associate Superintendent	Research and Evaluation
Mark McCall	Deputy Associate Superintendent	Educator Excellence
Eric Brooks	Director of Professional Learning	Educator Excellence
Steve Larson	Director of Effective Teachers and Leaders	Educator Excellence
Raquel Alvara	Education Program Specialist	Effective Teachers and Leaders
Harold Frederick	Education Program Specialist	Professional Learning
David Gauch	Education Program Specialist	Effective Teachers and Leaders
Charles Johnson	Education Program Specialist	Exceptional Student Services
Susan Poole	Education Program Specialist	Effective Teachers and Leaders
Jane Smoudi	Education Program Specialist	Professional Learning
Virginia Stodola	Education Program Specialist	Effective Teachers and Leaders

Additional Assistance:

Name	Title	Affiliation
Diane Douglas	Arizona Superintendent of Public Instruction	Arizona Department of Education
Dr. Jeanne Powers	Professor	Arizona State University
Dr. Sarah Polasky	Lead Researcher	Arizona State University
Yvonne Gauch	Enrollment Advisor	Cochise College
Trudy Berry	Superintendent	Cochise County Superintendent of Schools
Diane Smith	Executive Director	Greater Phoenix Educational Management Council (GPEMC)
Dr. Janice Johnson	Project Director	Maricopa County Education Service Agency
Ann Huber	Field Specialist	Maricopa County Education Service Agency
Richard Eagan	Business Systems Finance Administrator	Maricopa County Education Service Agency
Bruce DuPlanty	Peer Evaluator	Maricopa County Education Service Agency
Terry Reyna	Superintendent/Principal	McNeal Elementary School District
Dr. Heather Cruz	Deputy Superintendent	Peoria Unified School District
Joe Farmer	Principal	Sierra Vista Public Schools
Kriss Hagerl	Superintendent	Sierra Vista Public Schools
Terri Romo	Curriculum Director	Sierra Vista Public Schools
Kelly Segal	HR Director	Sierra Vista Public Schools
Dr. Jennifer Johnson	Executive Director	Support our Schools Arizona
Tim Carter	Superintendent	Yavapai County Superintendent of Schools
Tom Tyree	Superintendent	Yuma County Superintendent of Schools

Appendix B. Stakeholder Engagement

State of Arizona
Department of Education

May 4, 2015

The Arizona Department of Education is excited to announce additional Town Hall sessions to discuss an important issue facing today's schools. We invite education stakeholders like you to attend one of the sessions and help provide important feedback to guide the state's plan toward Equitable Access to Excellent Educators. Please note, these meetings will have a very specific topic of discussion and are separate from Superintendent Douglas' planned tour of the state.

The U.S. Department of Education (USED) has tasked each state with providing a statewide equity plan that supports the idea of "equitable access to excellent educators." This plan will help us assist schools in Arizona with strategies to ensure all students, with special attention to students from low-income families and students of color, have access to our highest performing teachers.

We look forward to seeing you at one of the Town Halls listed below and encourage you to pass the invitation along to the students, parents, teachers, district personnel and community leaders in your network. As we expand our definition of stakeholder, we also ask that you assist us by inviting those community groups (e.g., local Boys and Girls clubs, chambers of commerce, local chapters of education associations, special interest groups, civic organizations, etc.) in your area who have always served as a valuable resource to your work. This will allow us to garner the most complete and meaningful picture of the equity challenges in our state.

We thank you in advance for joining us in this work and look forward to seeing you at one of the following meetings. Please feel free to contact me with any questions [redacted]

- **Tucson -- Wednesday, April 29. 5-7pm.** Palo Verde High Magnet School, 1302 S. Avenida Vega
- **Sierra Vista -- Thursday, April 30. 5-7pm**. Buena High School Cafeteria, 5225 E. Buena School Blvd
- **Phoenix -- Monday, May 4. 10am-12pm.** Maricopa County Education Service Agency, 4041 N Central Ave, Suite 1100.
- **San Tan Valley -- Monday, May 4. 5-7pm.** Walker Butte Elementary, 29697 N Desert Willow Blvd
- **Safford—Wednesday, May 6. 5-7pm.** Graham County General Services Building, 921 West Thatcher Boulevard, Safford, AZ 85546
- **Tolleson--Thursday, May 7. 5-7pm.** Tolleson UHSD Board Room, 9801 West Van Buren St.
- **Flagstaff--Monday, May 11, 2015. 5-7pm.** Flagstaff Unified School District Board Room, 3285 E. Sparrow Ave., Flagstaff, AZ 86004
- **Ganado—Tuesday, May 12, 2015. 5-7pm**. Ganado Middle School, Room A113/A114 Ganado Unified School District, Ganado, AZ Highway 264 86505
- **Chandler--Tuesday, May 19. 5-7pm.** Primavera Blended Learning Center, 2451 N Arizona Avenue
- **Prescott--Wednesday, May 20. 5-7pm.** Yavapai County Education Service Agency, 2970 Centerpointe East Drive
- **Statewide Webinar—Wednesday, May 27. 4:00pm.**

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ADE Organized Meetings—Locations and Information

Peoria Unified School District Office Glendale, AZ	**April 6**	**District and SEA leadership**	**Facilitated by: Mark McCall, Eric Brooks, Steve Larson, Susan Poole, Virginia Stodola**
Peoria kicked off the spring stakeholder meetings and taught the team a great deal about communicating the message. While not well attended, we were able to have a conversation with ADE's Deputy Superintendent as well as the superintendent of one of the larger districts in the metropolitan Phoenix area. We were able to discuss how to reach other stakeholders and how to involve them later in the implementation and support of strategies.			
Bullhead City Elementary School District Office Bullhead City, AZ	**April 9**	**District and SEA leadership**	**Facilitated by: Raquel Alvara, Eric Brooks, Susan Poole, Virginia Stodola**
Ten participants were present at Bullhead City. From our small group discussions, one of the biggest issues of concern was centered on salaries. They also shared personal concerns when teachers are informed that their positions had changed. One teacher anticipated teaching ELA, but upon her return to school was informed that she would be teaching science. Overall, participants were extremely pleased that ADE travelled all this way to gain input from this region.			
Greater Phoenix Educational Management Council Phoenix, AZ	**April 10**	**Curriculum Council members (a diverse group of education and business leaders)**	**Facilitated by: Dr. Cecilia Johnson**
This group of education leaders from across Maricopa County are extremely influential and provided considerable feedback on the equity gaps and the overall issue of retention and recruitment.			
Arizona Department of Education: **Educator Retention and Recruitment Taskforce Meeting**	**April 17**	**Various education and business leaders from around the state, including higher education officials.**	**Facilitated by: Dr. Cecilia Johnson, Mark McCall**
This group is comprised of education and business leaders from around the state and includes representation from the universities, community colleges and policy groups such as TNTP and Expect More Arizona. This group discussed the three main equity questions we were considering and helped pave the direction for the equity gap analysis and strategy planning sessions.			
Arizona Western College Yuma, AZ	**April 20**	**District Superintendents and government leaders from Yuma County, AZ and Imperial County, CA**	**Facilitated by: Dr. Cecilia Johnson**
Government officials, university and community leaders and business representatives from southwestern Arizona were present at this meeting to provide additional final feedback on the three main equity questions before we evolved the future stakeholder meetings to consider the equity gap analysis and strategy planning sessions.			

Tucson Unified School District Tucson	**April 29**	**District curriculum director, teachers, principals, charter owner/leader.**	**Facilitated by: Mark McCall, David Gauch**

The mix of administration and teachers representing charter and public schools provided similar issues. All groups were fully agreeing that salaries were the main reasoning for teachers leaving the profession as well as not entering the profession. They stated that teachers could make more money in other professions with less responsibility. The other cause for teachers leaving is the additional stress put on teachers. Teachers do not have the support or resources to deal with the students who have disabilities, emotional concerns, social issues and other impairments that hinder their learning. They feel if there was the necessary support to elevate the additional workload stress, then more teachers would be inclined to stay in the field. Another issue that was brought up was the discrepancies in funding between charters and public schools as well as the difference in the accountability for both systems.

Sierra Vista Buena High School Sierra Vista, AZ	**April 30**	**Parents, district leaders, community college staff and the Cochise County Superintendent of Schools.**	**Facilitated by: Mark McCall, David Gauch**

The group indicated that teachers do not want to go to rural areas because there is not enough of personal activities, such as shopping, dining, and other family entertainment nearby. They stated that most of their candidates and teachers are homegrown. When they hire teachers coming into the county, those teachers usually stay for less than 3 years then move to Tucson which has more to offer. The Cochise College representative stated that she has seen a decrease in students entering the teacher profession over the past few years. Sierra Vista is also competing with Fort Huachuca in salaries. Cochise County is also highly competitive among their LEAs. Buses travel from school district to school district picking up open enrollment students. It is normal for a school district to send a bus into another school district's boundaries for students.

Title I Committee of Practitioners Phoenix	**May 1**	**Teachers and school leaders**	**Facilitated by: Eric Brooks, Steve Larson**

The Title I COP was attended by thirty-five educators. All of them are responsible for the Title I commitments in their LEA. The group is mostly comprised of Superintendents, District Office Personnel, and Principals. Through those lenses we discussed the three root causes that we have highlighted in our power point:

- Perception of the teaching profession
- Evaluation data is not an accurate measurement of classroom instruction
- Difficulty retaining and recruiting highly effective teachers

Each of the three root causes had its fair share of agreement. A highlight of that particular town hall was an administrator from our local region speaking to why he thinks we are struggling to retain highly effective teachers in the profession. "I went into teaching because I considered it an art form where I was allowed to create; now it's more like paint by numbers, that is fun the first time, but after a while it becomes boring."

Practitioners of English Language Learning Phoenix	**May 1**	**Teachers, business leaders, university officials**	**Eric Brooks, Steve Larson**

The OELAS PELL was attended by approximately 225 educators. Similar to the Title I COP we had representation from District Leadership in a variety of different forms. Because there were people in

the room who also participate in OELAS at the national level, we were able to hear things that are taking place in other states regarding the recruitment and retention of teachers. A number of people spoke to the fact that in other states pay raises are being offered. Others gave anecdotes regarding their teachers being able to teach in other areas for greater financial reward. Another consistent theme was that rural districts felt they were a training ground for the valley area. "We work with our teachers for two or three years and then when they get acclimated to the area, they take a job transfer to Phoenix, and they always get our best teachers." One highlight was in a breakout session where a middle school principal in Yuma stood up to say that in Yuma it is very difficult to get teachers to come because Yuma is so rural. This principal soon met with a representative from Red Mesa, one of the many Navajo Nation schools who shared her own definition of rural. The label "rural school" gets thrown about, and like most words, is relative to one's experiences.

Maricopa County / TIF grantees Maricopa County Education Service Agency Phoenix	**May 4**	**Administrators, school officials, community group leaders, education advocates and classroom evaluators.**	**Facilitated by: Mark McCall, Raquel Alvara, Virginia Stodola**

The groups focused on accountability. It seemed as though the participants wanted ADE to enforce stricter guidelines when it came to teacher evaluation instruments, ensuring that ADE set up some guide or checklist to ensure that LEAs are consistent in their evaluation tools. The participants also shared the importance of leadership and the continuation of professional growth. This group presented some strategies that ADE can work on in the coming months.

Walker Butte Elementary San Tan Valley	**May 4**	**Administrators, school officials**	**Facilitated by: Susan Poole, Raquel Alvara**

Participants discussed the challenge of teacher salaries. One experienced teacher shared the frustration in working to assist new teachers knowing that the new teachers do not tend to last long. The group does want to see solutions; they strongly feel that raising taxes is going to be the only way to see change within education.

Graham County Safford, AZ	**May 6**	**School officials, county officials, parents**	**Facilitated by: Eric Brooks, Steve Larson**

Safford had a diverse representation from the community including parents, several district administrators, several charter administrators, and the Graham County Superintendent of Schools. A highlight of this town hall meeting was the fact that each small group quickly delved into the fishbone exercise and came up with an expanded look at our root causes. This was also one of the first town hall meetings where the legislature was mentioned as a key player in the role of retaining and recruiting teachers. Lastly, they spoke of the importance of a partnership with the local community college (Eastern Arizona College) to assist them in growing their own teacher pool. But, not unlike our other groups, they also mentioned the fact that their national recruiting efforts were not as fruitful as they have been in the past, and that they served as a training ground for new teachers to get experience and then move to what could be considered greener pastures.

Tolleson Unified School District Tolleson, AZ	**May 7**	**School officials, member of a research and policy group**	**Facilitated by: Raquel Alvara, Virginia Stodola**

Participants were most concerned with retention and recruitment, which correlated to the funding issue. The group also voiced their concern around teacher preparation within higher education. This group

seemed dismal and unsure if there were solutions to address these challenges. They were still appreciative of ADE coming out to share and allow for input from them as stakeholders.

Flagstaff Unified School District Flagstaff, AZ	**May 11**	**School officials and parents.**	**Facilitated by: Susan Poole, Eric Brooks, Steve Larson**

A diverse set of educators participated in the Flagstaff Equity Town Hall. Each brought a unique perspective. The charter schools felt the use of student academic progress data was a major obstacle to labeling effective teacher. The school district director of finance focused on charter schools taking high performing students out of the population and distorting the effective teacher data. A Native American parent shared that local politics may hinder efforts to raise standards and implement improvement expectations. All participants came with a passion for the students and community they serve.

Ganado Unified School District, Ganado, AZ	**May 12**	**School leaders, tribal leaders and parents**	**Facilitated by: Susan Poole, Eric Brooks, Steve Larson**

Seventeen Ganado participants spoke with great pride about their community and was one of our most vocal Equity Town Halls. We were very pleased that along with educators we had parents, and a school board member and tribal leader. Most of the conversation focused on the barriers to retaining and recruiting teachers to their remote rural location that faced a large concentration of social and economic challenges. They emotionally expressed that federal and state educational bureaucracy hindered their improvement efforts.

Primavera Blended Learning Center Chandler, AZ	**May 19**	**Parents, community leaders, teachers and school administrators**	**Facilitated by: Eric Brooks, Steve Larson**

Fifteen participants, mostly representing the host school participated in a passionate discussion including the ideas that many of these issues are beyond our control, “despite school’s best efforts,” as one attendee stated. This meeting examined possible performance objectives and ways that those could be measured.

There were a couple of ideas that stood out as being unique to this town hall meeting. One participant suggested we look at the way we pay teachers differently. His suggestion was to reform the way teachers, particularly those new to the profession, pay into the state’s retirement system in order to keep more money up front.

An additional idea around the concept of teacher salaries was the way an LEA might choose to handle employee benefits. A Tucson charter school representative discussed that his school offers excellent medical benefits, pays in to the retirement system, and provides a higher salary rate than their local competitors. And although it comes at an additional expense to them, they think it is worth it because it allows them to glean the best teacher candidates in that area.

Yavapai County Education Service Center, Prescott, AZ	**May 20**	**County officials, community and business leaders**	**Facilitated by: Mark McCall, David Gauch**

This conversation was very similar to previous Town Hall meetings and included participation by the county school superintendent and three community members representing nonprofit organizations that advocate for students and families. Once again, teacher salaries and the disparities between charters and traditional public schools were the main topics. The county superintendent noted that there has been thirty-eight teaching positions across the county that have not been filled since last summer. External factors such as housing and employment for spouses were also expressed as concerns from the group. A new cause was brought forth: too many school choices. Someone noted that communities have lost the

bond that brought them together and community schools do not exist anymore.

The conversations included the discussion of strategies including increasing voter participation and increasing funding and salaries.

Statewide Webinar	**May 27**	**Previous attendees at Town Hall sessions**	**Facilitated by: Mark McCall, Eric Brooks, Virginia Stodola, Susan Poole, David Gauch, Raquel Alvara.**

Presented from the ADE offices, this webinar was presented as an opportunity for Town Hall participants and other stakeholders to see the final data results that were collected as well as gain additional understanding of what ADE identified as Key Concerns and Root Causes, based on the stakeholder feedback. The webinar also gave participants the opportunity to provide feedback on the performance objectives and the likelihood of their success. Following the webinar, participants were sent a survey to rate the performance objectives and provide additional commentary. Those who completed the survey were awarded 1 professional development credit to use toward recertification. Most performance objectives received high ratings. The ADE team reviewed the two that received scores of "unlikely" by more than 50% of the respondents and discussed possible reasons for the dissatisfaction and then edited the POs.

Several themes have remained consistent throughout all of the educator equity town hall meetings. One of our gravest concerns in Arizona is our ability, or lack thereof, to attract teachers. Whether it is teacher candidates in our Institutions of Higher Education, or numbers at our annual teach-in being considerably lower than last year our LEAs around the state are feeling it and each are struggling with ways to accomplish the goal of equitable access to excellent educators.

Coconino
Apache
Mohave
Navajo
Yavapai
La Paz
Gila
Maricopa
Greenlee
Pinal
Graham
Yuma
Pima
Cochise
Santa Cruz

Appendix C. Definition of Key Terms

Student of color	Used interchangeably with "minority," students identifying as American Indian/Alaska Native, Asian, Black, Native Hawaiian/Pacific Islander, Hispanic, or Two or More Races.
Economically Disadvantaged	Used interchangeably with "poverty," students eligible for free and reduced lunch.[35]
Teacher	An individual who provides instruction to Pre-Kindergarten, Kindergarten, grades 1 through 12, or ungraded classes; or who teaches in an environment other than a classroom setting and who maintains daily student attendance records. Recognizing that many classes do not meet every week day school is in session, "daily student attendance" means a teacher takes attendance each time the class meets.
Out of Field	Not appropriately certified for the area in which they teach. Arizona does not have this distinction and anyone considered "out of field" would likely be a substitute, teaching under a substitute certificate.
Unqualified	A teacher that has not met all state licensing or certification requirements, does not have a minimum of a bachelor's degree, and/or cannot demonstrate core academic subject competence and knowledge.
Inexperienced	A teacher in their first or second years in the profession.
Veteran or Experienced	A teacher with three or more years of experience.
Absenteeism	A calculation based on the number of teachers absent from the classroom for more than ten days of the school year.
Excellent	Fully prepared to teach the specified content, demonstrates strong instructional practices and significant contributions to growth in student learning, and consistently demonstrates professionalism and a dedication to the profession both within and outside of the classroom.
Highly Effective	Consistently exceeds expectations and has mastered the adopted professional teaching standards. Students with a highly effective teacher generally make exceptional levels of academic progress.
Effective	Consistently meets expectations and demonstrates competency with the adopted professional teaching standards. Students with an effective teacher generally make satisfactory levels of academic progress.

[35] USED Civil Rights Data Collection, Educator Equity Profile

Developing	Fails to consistently meet expectations and requires a change in performance due to insufficient level of competency with adopted professional teaching standards. Students with a developing teacher generally made unsatisfactory levels of academic progress. This classification may be assigned to a new or newly-reassigned teacher for more than two consecutive years.
Ineffective	Consistently fails to meet expectations and requires a change in performance due to minimal competency with adopted professional standards. Students with an ineffective teacher generally make unacceptable levels of academic progress.[36]

[36] Arizona Framework for Measuring Educator Effectiveness

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ARIZONA FRAMEWORK FOR MEASURING EDUCATOR EFFECTIVENESS

Effective Beginning the

2016-2017 School Year

The Arizona State Board of Education

Adopted April 25, 2011 and Amended May 19, 2014 and January 25, 2016

ARIZONA STATE BOARD OF EDUCATION
2015-2016 TASK FORCE ON TEACHER AND PRINCIPAL EVALUATIONS

The 2015-2016 Task Force on Teacher and Principal Evaluations conducted its work in service of the students in Arizona's public schools. The Task Force members hold that the goal of both teacher and principal evaluations is to enhance performance so that students receive a higher quality education. Further, the work here submitted reflects the belief that evaluations are most effective as one part of a systemic approach to improving educator performance and student achievement.

VISION

"*To improve student learning, Arizona supports effective teachers and principals by developing a model framework that is flexible in its application and establishes the expectations for a comprehensive evaluation and feedback process, to which all Arizona Local Education Agency (LEA) evaluation instruments shall align.*"

GOALS

- To allow local educational agencies (LEAs) flexibility in aligning teacher and principal evaluations within the framework;
- To reflect equity, opportunity, and research in the evaluation process;
- To create a framework that supports continuous improvement;
- To increase data-informed decision making to foster a school culture of continual student learning and progress;
- To incorporate multiple measures of student academic progress in the evaluation process;
- To ensure that valid and reliable measures of student academic progress and professional practice are significant components of the evaluation process;
- To facilitate and inform educator growth through mentoring and professional learning;
- To provide for periodic review of this evaluation framework and implementation and make any modifications deemed necessary based upon the best available data.

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ARIZONA REVISED STATUTES § 15-203(A)(38)

ARS §15-203(A)(38), first adopted in 2010 and subsequently amended, requires the State Board of Education to -*" adopt and maintain a model framework for a teacher and principal evaluation instrument that includes quantitative data on student academic progress that accounts for between thirty-three percent and fifty percent of the evaluation outcomes."* The statute requires the Board to include four performance classifications in the framework, and adopt best practices for professional learning and evaluator training.

BACKGROUND

Outstanding teachers and principals make a difference. Great classroom teaching and principal leadership are the strongest predictors of student development and achievement. Based on this reality, in 2010 Arizona legislators initially passed a law intended to change the culture of education in Arizona, and improve how local educational agencies (LEAs) evaluate their teachers and principals. Specifically, this law requires the State Board of Education (SBE) to develop a framework for teacher and principal evaluations that includes quantitative data on student academic progress that accounts for between 33% and 50% of each evaluation outcome. LEAs will be required to use an instrument that meets the requirements established by the framework to annually evaluate individual teachers and principals.

The Arizona Framework for Measuring Educator Effectiveness detailed in this document complies with all legal requirements while also providing districts and charters with as much flexibility as possible to develop evaluation systems that meet their individual needs. The local control of LEAs to create, implement and revise, as needed, within this guidance framework is paramount to building effective, locally relevant evaluation systems. To that end the framework should be used to guide local decisions and does not constitute a "one size fits all" evaluation system. Each LEA is ultimately responsible to develop systems and policies that align to their specific needs.

To ensure the equity and success of all evaluation systems, LEAs should take the necessary steps to align professional learning to evaluation outcomes. The Task Force recommends that teachers and principals remain focused on Arizona's Professional Teaching and Administrative Standards. These will serve as key components in all evaluation systems. In addition, LEAs should develop and/or participate in professional learning that meets the standards from Learning Forward to ensure that all professional learning for educators meets the highest standards of quality.

Technical assistance for implementing your evaluation system is available by contacting the Effective Teachers and Leaders Unit of the Arizona Department of Education.

DEFINITIONS

Academic Growth
The change in student achievement students experience between two or more points in time. For the purpose of evaluation state assessment data and/or student growth percentiles must be a significant factor in the calculation.

Academic Progress
Measurement of student's learning of grade level content standards; these measures shall include the amount of academic growth students demonstrate and their academic proficiency. These measures may be calculated using data from, but not limited to, state administered assessments, SLOs, LEA benchmark assessments, formative or summative assessments, and school achievement profiles.

Benchmark Assessments
Used to evaluate where students are in their learning progress and determine whether they are on track to performing well on future assessments, such as standardized tests or end-of-course exams. Benchmark assessments are usually administered periodically during a course or school year.

Classroom-Level Data
Data that are limited to student academic progress within an individual classroom or course. These may include scores on state administered assessments, district/school assessments, interim/benchmark assessments, standardized assessments, Student Learning Objectives (SLOs) and other measures of individual student learning.

Classroom Observations
Used to generate measures of teaching performance and professional practice through observable classroom processes including specific teacher practices, aspects of instruction, and interactions between teachers and students; Classroom observations can measure broad, overarching aspects of teaching or subject-specific or context-specific aspects of practice.

Formative Assessment
A wide variety of methods that teachers use to conduct in-process evaluations of student comprehension, learning needs, and academic progress during a lesson, unit, or course; these data are intended to provide feedback needed to adjust ongoing teaching and improve learning outcomes.

Framework
A general set of guidelines that comprise the basic elements that shall be included in all teacher and principal evaluation instruments utilized by Arizona LEAs.

Group A Teachers
Teachers with multiple measures of valid and reliable classroom-level student academic progress data, as determined by the LEA. These data shall align to Arizona's content standards, and be appropriate to individual teachers' subject areas.

Group B Teachers
Teachers not meeting the requirements for Group A Teachers.

Multiple Measures of Student Learning
The use of various types of measures of student learning, for the purpose of evaluating teachers' and principals' effectiveness. For example, state level assessments, value-added or growth measures, curriculum-based tests, SLOs, pre/post-tests, capstone projects, oral presentations, performances, or artistic or other projects.

New Teacher
A teacher new to the profession or with less than three years of teaching experience.

Newly Reassigned Teacher
A teacher who has been newly assigned to a grade, ~~a~~ content area or ~~a~~ school.

Nontested Grades and Subjects
Refers to the grades and subjects for which state level assessments do not exist because they are not required to be tested under the Elementary and Secondary Education Act or Arizona law.

Parent Surveys
Questionnaires that seek information from parents regarding their perceptions of their teacher, principal and/or school.

Pre- and Post-Tests
Tests that measure the content of the curriculum of a particular course or grade that are taken at the beginning of a time period (usually a semester or year) and then toward the end of that period to obtain a measure of academic growth.

Reliability
The degree to which an assessment tool produces stable and consistent results.

School-Level Data
Data that relates to student academic progress within an individual team, grade, or school. These may include scores on state administered assessments, district/school assessments, benchmark assessments, standardized assessments, SLOs and other measures of student learning.

SLO - Student Learning Objective

A Student Learning Objectives, or SLO, is a classroom-level standards-based measure relevant to the content area taught during the current school year that is specific and measurable, written to measure academic growth and mastery, and assesses all or the most important standards within the course. See the Arizona Department of Education guide, The Student Learning Objective Handbook, for more information.

Student Surveys

Questionnaires that seek information from students regarding their perceptions of their teachers, principal and/or school.

Summative Assessment

Assessments used to determine whether students have met instructional goals or student learning outcomes at the end of a course, program, or academic year.

Teacher or Principal Performance and Professional Practice

An assessment of teacher or principal professional performance and practice that is based upon multiple observations and evaluation instruments which contain rubrics aligned to the appropriate professional standards approved by the State Board.

Team

A group of teachers that teach the same subject, students or grade levels that are expected to collaborate to impact student learning and or school outcomes.

Validity

The extent to which a test measures what it is purported to measure and therefore the results of the test allow for accurate conclusions to be made about student academic progress.

Veteran Teacher

A teacher, who is not new or newly reassigned, with three or more years of teaching experience.

FRAMEWORK FOR TEACHER EVALUATION INSTRUMENTS

FRAMEWORK FOR TEACHER EVALUATION INSTRUMENTS

Arizona's Framework for Measuring Educator Effectiveness is designed to provide LEAs with as much flexibility as possible to create and implement evaluation systems for teachers of Kindergarten through grade 12 that fit the individual needs of each LEA. While not required by the Board or statute, LEAs may include the evaluation of Pre-Kindergarten teachers in the evaluation systems they adopt.

LEA evaluation systems shall include teaching performance and professional practice measures (ARS §15-537) and academic progress measures (ARS §15-203 (A)(38)). These measures shall apply to all teachers. Each LEA is encouraged to develop or refine evaluation systems so that these systems provide valuable information to support and improve teacher performance.

Teaching Performance and Professional Practice

- The teaching performance and professional practice component of the evaluation shall account for between 50% and 67% of the total evaluation outcome.

- LEAs shall use multiple measures of teaching performance to evaluate teachers.

- LEA evaluation instruments developed or selected as meeting the needs of the LEA shall include rubrics that are aligned to the Professional Teaching Standards approved by the State Board of Education in Board Rule R7-2-602.

- LEAs are encouraged to evaluate the alignment of rubrics, or portions thereof, to determine the indicators that provide essential evidence of effective teaching performance and professional practice.

Components of Effective Educator Evaluations and Best Practices

To assist LEAs as they work to revise their teacher and principal evaluation instruments to meet the requirements of the Arizona Framework for Measuring Educator Effectiveness, the Task Force recommends a focus on the following key components of effective educator evaluations for teachers and principals:

- **Arizona's Professional Teaching Standards** – The Arizona State Board of Education has adopted professional teaching standards from the Interstate Teachers Assessment and Support Consortium (InTASC) that establish specific expectations for the skills and knowledge that all Arizona teachers should possess. These standards should serve as key components in any teacher evaluation system.

- **Arizona's Professional Administrative Standards** – The Arizona State Board of Education has adopted principal leadership standards that establish specific expectations for the skills and knowledge that all Arizona principals should possess. These standards should serve as key components in any administrative evaluation system.

- **Learning Forward's *Standards for Professional Learning*** —The Arizona State Department of Education has adopted the *Standards for Professional Learning* from Learning Forward that establish specific expectations to ensure that all professional learning for educators meets the highest standards of quality.

- **Evaluator Training to Ensure Inter-Rater Reliability** – Critical to the equity and success of all evaluation systems is the professional learning of staff to ensure the reliability and validity of the evaluation process.

The list below serves as suggestions for ideal practices in order to improve student achievement in Arizona.

- Ongoing use of quality post-observation feedback, plus use of data and assessment analysis to drive increased student academic progress and achievement;
- Multiple formative and summative teacher and principal evaluations per year;
- Qualified and certified evaluator inter-rater reliability for teachers and principals;
- Extensive use of national student and teacher standards for the design of evaluation rubrics;
- Alignment between teacher and principal observation instruments for increasing student academic progress and achievement;
- Multi-levels of teacher and principal performance competencies;
- Develop a campus climate conducive to conducting annual evaluations of teachers and principals for the purpose of increasing student academic progress and achievement;
- Use of an annual educator's goal(s) plan for all teachers and principals resulting with increased student Academic Progress and achievement;
- All teachers and principals are accountable for improvement of student academic Progress and achievement;
- Rubrics based on national teacher, principal, and student standards;
- Use of LEA educator evaluation data to determine allocation of staff, professional learning, and resources for building capacities for increasing student academic progress and achievement;
- Facilitate and inform educator growth through mentoring and professional learning.

Academic Progress

High stakes decisions about educator effectiveness shall be made using multiple measures of student learning that are both valid and reliable. Because LEAs throughout Arizona have vastly different student academic progress data available across multiple content areas, it is not possible to impose strict rules on which data should be used for all teachers. Therefore, LEAs must make local determinations regarding a teacher's status, Group A or Group B, based on the availability of multiple, valid and reliable measures for the grade and/or content area for individual teachers (see **Use of Student Academic Progress Data Decision Tree**).

To this end, this framework identifies several sources of data that may be used; however, LEAs should recognize that many teachers do not have multiple, varied, valid and reliable measures of student learning. This is particularly true for teachers in special needs areas and for those in grades and subjects where statewide assessments are not required. As LEAs continue to refine or develop their own evaluation systems, priority should be given to the creation of valid and reliable measures in these high need areas.

- Student academic progress data shall account for between 33% and 50% of the total evaluation outcomes. LEAs may set the weight of all data elements as they deem appropriate; however, the total weight of these data shall not exceed 50% of the total evaluation outcome.

- LEAs shall ensure that multiple measures of student academic progress are used to calculate the portion of each teacher's evaluation dedicated to student academic progress.

- LEAs shall ensure that academic progress calculations include measures of academic growth.
    - The academic growth calculation shall comprise at least 20% of the total evaluation outcome.
    - State assessment data including student growth percentiles <u>must</u> be a significant factor in the academic growth calculation.

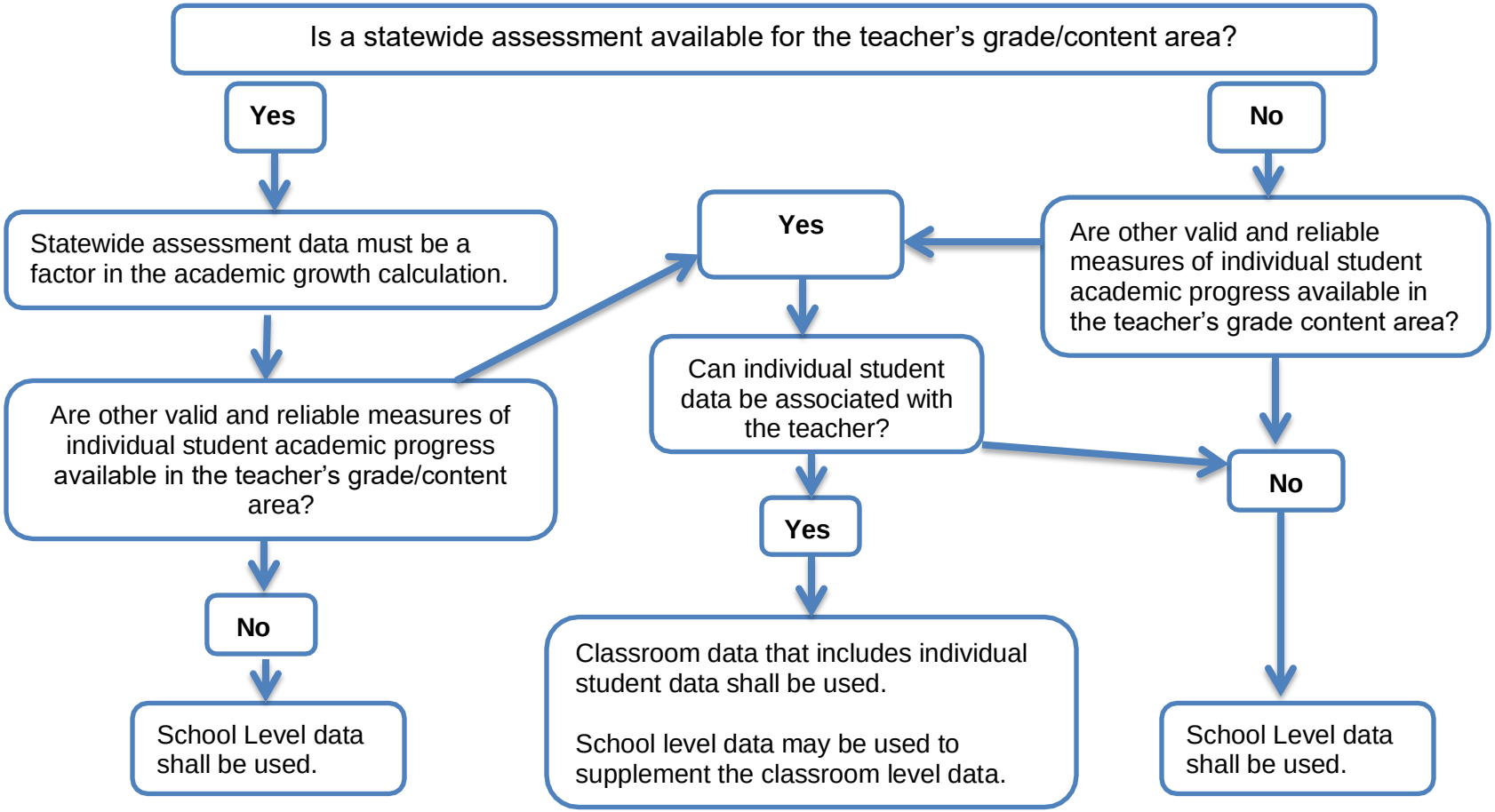
- When appropriate to a teacher's grade and/or content area, data from state administered assessments shall be used as at least one of multiple measures of academic progress.

- The use of classroom-level and school-level data elements and the proportion they contribute to the evaluation of academic progress for Group A and Group B teachers shall be determined by the LEA.

- LEAs should determine the relative proportion of student academic progress measures based on the evaluation of the:
    - alignment of measures to the school's mission, vision and/or culture;
    - availability of multiple, valid and reliable measures;
    - availability of state assessment data in the grade/content area;
    - attribution of individual students' learning measures to their teachers.

- LEAs should refer to the **Use of Student Academic Progress Data Decision Tree** to determine the use of individual student, classroom, and school-level data:
  - Group A: In cases where valid and reliable classroom-level data are available, LEAs shall incorporate classroom-level data into the final evaluation outcome, including statewide assessment.
    - These data may be combined with school-level data. School-level data may include aggregate team, grade, or school-level data.
  - Group B: In cases where *no* valid and reliable classroom-level data exist, school-level data shall account for at least 33% but shall not exceed 50% of the total evaluation outcome.
    - School-level data may include aggregate team, grade, or school-level data.

Use of Student Academic Progress Data Decision Tree



Academic Progress
A measurement of student academic performance. These measurements shall include the amount of academic growth students experience between two or more points in time, and may also include other measures of academic performance, including, but not limited to, state administered assessments, district/school formative and summative assessments, and school achievement profiles.

Classroom-Level Data
Data that are limited to student academic progress within an individual classroom or course. These may include scores on state administered assessments, district/school assessments, interim/benchmark assessments, standardized assessments, Student Learning Objectives (SLOs) and other measures of individual student learning.

Multiple Measures of Student Learning
The use of various types of measures of student learning, for the purpose of evaluating teachers' and principals' effectiveness. For example, state level assessments, value-added or growth measures, curriculum-based tests, SLOs, pre/post-tests, capstone projects, oral presentations, performances, or artistic or other projects.

LEAs may consider the development or identification of other measures to supplement those teachers with only minimal data available.

Calculating total evaluation outcome:
LEAs must combine the score derived from the teaching performance and professional practice portion with the academic progress score to determine the total evaluation outcome. LEAs shall determine the weights of these two portions, adhering to the requirements described above.
For example, if an LEA's evaluation system results in a total evaluation outcome score ranging from 0-100 points; then student academic progress shall represent between 33 and 50 points. Of those points, 20 points shall come from measures of academic growth (leaving 13 to 30 points to be determined by other measures of academic progress). The remaining 50 to 67 points shall reflect the measure of teacher professional performance and professional practice.

The total evaluation outcome shall be used to determine each teacher's teacher performance classification. LEAs are responsible for determining the points associated with each classification rating.

Teacher Performance Classifications:

As prescribed in A.R.S. § 15-203, LEAs shall classify each teacher in one of the following four performance classifications:

- **Highly Effective:** A *highly effective* teacher consistently exceeds expectations. This teacher's instructional performance is exceptional and her/his students generally made exceptional levels of academic progress. The highly effective teacher demonstrates mastery of the state board of education adopted professional teaching standards, as determined by classroom observations required by ARS §15-537.

- **Effective:** An *effective* teacher consistently meets expectations. This teacher's instructional performance is effective and her/his students generally made satisfactory levels of academic progress. The effective teacher demonstrates competency in the state board of education adopted professional teaching standards, as determined by classroom observations as required by ARS §15-537.

- **Developing:** A *developing* teacher fails to consistently meet expectations and requires a change in performance. This teacher's instructional performance is mixed and her/his students generally made unsatisfactory levels of academic progress. The developing teacher demonstrates an insufficient level of competency in the state board of education adopted professional teaching standards, as determined by classroom observations required by ARS §15-537. The developing classification is not intended to be assigned to a veteran teacher for more than two consecutive years. This classification may be assigned to new or newly-reassigned teachers for more than two consecutive years.

- **Ineffective:** An *ineffective* teacher consistently fails to meet expectations and requires a change in performance. This teacher's instructional performance is ineffective and her/his students generally made unacceptable levels of academic progress. The ineffective teacher demonstrates minimal competency in the state board of education adopted professional teaching standards, as determined by classroom observations required by ARS §15-537.

FRAMEWORK FOR PRINCIPAL EVALUATION INSTRUMENTS

FRAMEWORK FOR PRINCIPAL EVALUATION INSTRUMENTS

Principals are the instructional leaders of our schools and ultimately responsible for student achievement in all content areas and grade-levels. For this reason the framework for principal evaluation instruments is most directly tied to school-level student achievement data.

The table that follows outlines the evaluation framework for principals. It also includes the types of student achievement data that may be used. As LEAs use this framework to develop or refine their own evaluation instruments they shall adhere to the following requirements:

- LEAs shall ensure that multiple data elements are used to calculate the portion of each principal's evaluation dedicated to student academic progress.

- Measures of Academic Progress at the school-level shall account for at least 33% of evaluation outcomes. LEAs may increase the weight of these elements as they deem appropriate; however, the total weight of these data shall not exceed 50% of the total evaluation outcome. Data from state administered assessments shall be included as at least one of the school-level data elements. LEAs may determine which additional school-level data will be used and in what proportions.

- LEAs shall ensure that the total measure of Academic Progress (classroom-level and/or school-level) includes a calculation of the amount of Academic Growth students experience. The Academic Growth calculation shall comprise at least 20% of the total evaluation outcome. State assessment data including student growth percentiles must be a significant factor in the Academic Growth calculation.

- LEAs may choose to incorporate other types of system/program-level data into principal evaluations that focus on student academic progress in specific programs, grade-levels, and subject areas. For example, LEAs may determine that their principal evaluations will include Academic Progress data related to third grade reading proficiency rates. If other types of system/program-level data are used the total weight of these data shall account for no more than 17% of evaluation outcomes. Additionally, the sum of these data and school-level data shall not exceed 50% of the total evaluation outcome.

- The "Leadership" component of the evaluation shall be based upon observation of a principal's performance. LEAs' evaluation instruments shall include rubrics for this portion of the evaluation that are aligned to the Professional Administrative Standards approved by the State Board of Education in Board Rule R7-2-603. The "Leadership" component of the evaluation shall account for between 50% and 67% of evaluation outcomes.

ADDITIONAL INSTRUCTIONS AND RECOMMENDATIONS TO LEAs

- LEAs shall ensure that multiple measures of student academic progress are used to calculate the portion of each teacher's evaluation dedicated to student academic progress;

- When available, data from statewide assessments shall be used to inform the evaluation process;

- All assessment data used in educator evaluations shall be aligned with Arizona State Standards;

- LEAs shall include student achievement data for reading and/or math as appropriate. However, student achievement data should not be strictly limited to these content areas;

- LEAs are encouraged to use SLOs when statewide assessment data are not available for the individual teacher;

- Evaluation instruments should integrate student academic progress data with data derived through classroom observations – neither should stand alone;

- All evaluators should receive professional learning in order to effectively implement their LEA's teacher evaluation system;

- LEAs should provide for the development of classroom-level achievement data for teachers in those content areas where these data are limited or do not currently exist so that all teachers use the Group A framework;

- LEAs should develop and provide professional learning on the evaluation process and in those areas articulated in Arizona's Professional Teaching and Administrative Standards, as approved by the State Board of Education;

- As required by ARS § 15-537, LEAs shall develop with stakeholder input:

    - Incentives for teachers in the highest performance classification, which may include multiyear contracts not to exceed three years;
    - Incentives for teachers in the two highest performance classifications to work at schools that are assigned a letter grade of D or F;
    - Protections for teachers who are transferred to schools that are assigned a letter grade of D or F;
    - Protections for teachers if the principal of the school is designated in the lowest performance classification;
    - Performance improvement plans for teachers designated in the lowest performance classification; and
    - Dismissal or nonrenewal procedures for teachers who continue to be designated in the lowest performance classification.

APPENDICES

APPENDIX A

POSSIBLE RESOURCES FOR ARIZONA LEAs TO ASSIST IN THE PREPARATION AND IMPLEMENTATION OF AN EDUCATOR EVALUATION SYSTEM

ASSESSMENT DATA SOURCE	METHOD(S)	EXAMPLE
AZELLA	Percent of students testing English proficient	With the exception of pre-emergent and emergent students, 30%* of ELL students will test out of ELD (*A-F School Achievement standard)
AzMERIT (select reading, math, or science)	Movement on the measurement scale MAP - School Achievement scale scores Percent correct for student below the highest measurement level	X percent of students will improve one measurement label; no more than X percent will drop from the highest performance level X percent of students are predicted to pass AzMERIT in 2 years (criteria utilized in MAP) 60% of ELL students will increase by X percentage points on the Reading test; X percent of non-ELL students will increase by X percentage points; the percent of students in the highest category will remain the same (this is an example of differing subgroup performance and could be used with other subgroups)
District Benchmark Assessments (given three times)	Percent correct	X percent of students will increase from the first to the third benchmark by at least X percentage points. Using a vertically equated scale the growth in scale scores across each benchmark will increase a minimum of X scale points
End of Course Assessment (no pretest)	Percent of students who achieve an identified percentage of items	X percent of students will achieve 80% on the end of course exam
SLO Process Student Learning Objective: Achievement Goal Growth Goal	Percent of students who demonstrate proficiency on the end-of-course assessment X number of students who show at least a 50% increase of the potential growth from baseline assessment to end-of-course assessment for each Level of Preparedness Group (High, Adequate, Low Group) Number of students who move one category over on a 4 or 5 point rubric	Example: 80% of students will score at least a 75% on the end-of-course exam. 80% of students will score a 3 on a 4 point rubric Average baseline score+ [(100-average baseline score) x 50%] = SLO Growth Score for each Level of Preparedness Group (High, Adequate, Low Group) X number of students will show growth of one category on a 4-5 point rubric

APPENDIX B

SAMPLE PROCESS TO DEVELOP TEACHER AND PRINCIPAL EVALUATION INSTRUMENTS

Sample LEA Teacher and Principal Performance Evaluation System Design Team

Statement of Role of the Evaluation Instrument Design Team: To develop recommendations to the Administration under the auspices of the Governing Board regarding the inclusion of at least 33% of the teacher and principal evaluation instruments to include student academic progress. All recommendations will be thoughtfully considered and researched by the appropriate individuals before finalizing any policy or procedure.

Purpose: To improve achievement of students in Sample Public Schools by implementing a teacher and principal evaluation instrument which ensures that student academic progress is a significant component of the performance evaluations of teachers and principals.

Goals:

- To enhance and improve student learning;
- To use the evaluation process and data to improve teacher and principal performance;
- To incorporate multiple measurements of achievement;
- To communicate clearly defined expectations;
- To allow districts and charters to use local instruments to fulfill the requirements of the framework;
- To reflect equity, flexibility, and a research-based approach;
- To create a culture where data drives instructional decisions;
- To use the evaluation process and achievement data to drive professional learning to enhance student performance;
- To increase data-informed decision making for students and evaluations fostering school cultures where student learning and progress is a continual part of redefining goals for all.

Design Team Composition: Teacher Evaluation Instrument

Teachers in tested and non-tested areas (Sp. Ed., STEM areas, CORE etc.), Administrators, etc.

Design Team	Specific Objective	Deliverables/ Products	Deadline	Meeting Dates/Location
Evaluation Instrument Design Team Members: Facilitator:	To advise the district with specific recommendations for indicators of student academic progress for the purposes of teacher evaluation	Identify the best data available by grade/content areas for use with both tested and untested groups. List of specific objective indicators of student academic progress to include in the Evaluation Instrument in order to comply with the new state mandate.	Implementation <DATE> To Governing Board for approval <DATE>	<DATES>

Design Team Composition: Principal Evaluation Instrument
Principals (elementary, middle, high school, if appropriate)
Assistant Principals (middle and high school, if appropriate)

Design Team	Specific Objective	Deliverables/ Products	Deadline	Meeting Dates/Location
Principal/ Assistant Principal Members: Facilitator:	To advise the district with recommendations for specific objective indicators of student academic progress to be included on the principal and assistant principal evaluation instrument.	List of specific objective indicators of evidence of student academic progress for inclusion on the principal and assistant principal evaluation instrument.	<DATES>	<DATES>

Evaluation Instrument Revision Meeting Schedule	Key Discussion Topics/Questions	Deliverables/ Products
<DATES>	Background on Arizona State Board of Education Framework Review of Research Utilized for Framework What are the quantitative measures that we currently have in place? What are other assessment measures in place in classrooms? What does the data look like from these measures?	List of quantitative measures in place List of other assessment measures in place in various classrooms
	Review of current practice on collecting student achievement information (connection to last meeting) Brainstorming session to form possibilities for achievement data collection Review of current Evaluation Instrument (examine areas where indicators could be added/moved/deleted/rewritten)	
	Design Phase: Develop new indicators Examine rating scale and make recommendations	
	Review Evaluation Instrument Conduct teacher/principal survey Conduct school based discussions led by principals Review Evaluation Instrument and revise as needed	
	To Governing Board for Pilot Approval, <DATE>	
	Pilot Conducted Feedback to Design Team Final Revisions Governing Board Review and Approval, <DATE>	

APPENDIX C

SAMPLE LEA COMMUNICATION PLAN

The goals of the Teacher and Principal Evaluation Design Communication Plan are as follows:

1. Establish a regular and timely communication process as we revise the Evaluation Instrument to include at least a 33% focus on student academic progress.
2. Raise the awareness and understanding of student assessment and measures of student academic progress with all teachers and administrators.
3. Garner support for the new teacher and principal evaluation system. Establish understanding of new Arizona State Law requirements regarding teacher and principal evaluation.

Purpose: The revision of the Evaluation Instruments to meet the new requirements of Arizona State Law for teacher and principal evaluation provides LEAs the opportunity to increase awareness of the importance of student assessment, to foster comprehensive analysis of the available quantifiable student achievement data and to tie this information to the development of a highly skilled teaching and administrative staff. The following communication framework is suggested:

Communication Methods	Purpose	Timeline	Dissemination	Audience
Updates/ Briefings	To demonstrate open communication regarding the development of the new components of the Evaluation Instruments	Communication about the Design Team process and charge sent out in late April 2010 Progress information sent out by May 2010 TBA as the Design Team	Electronic Communication/E mail	Teaching Staff, Principals, Senior Staff
Administrative Team Updates	Dissemination to a wide number of departments	As per scheduled meetings at the request of senior staff	Verbal with handouts as appropriate	All school and department administration
Phone Calls	Handling individual concerns, etc.	Returned within 24 hours or less	Individual	Individual
Emails/Outlook	General updates, Design Team communication, Handling individual concerns, sending meeting appointments	Returned within 24 hours or less.	Individual/ Design Team/Staff	Individual/ Design Team/Staff

Web Site	To disseminate information quickly to a broad audience		Currently internet, so, this will be general information	Unlimited
Social Media	To disseminate information quickly to a broad audience		Currently internet, so, this will be general information	Unlimited
School Presentations/ Discussions	To provide clear and consistent information to all teachers	<DATES>	Presentation	All participants and interested others at each school
Teacher Survey/Principal Survey	To gather information from a wide audience	<DATES>	Electronic/ Survey Monkey	Teachers/Principals
Governing Board Communication	To communicate effectively with the superintendent and Governing Board	Upon request	Emailed	Superintendent/ Governing Board
Pilot Study Process	To gather information on possible implementation issues as the instrument is tested with a small group of teachers and school administrators	<DATES>	Presentation/One to one dialogue	Teachers/ Principals
New Evaluation Instrument Publication	To provide clear and consistent information to teachers, principals and teacher evaluators	<DATES>	Print/Electronic Publication	All teachers and teacher evaluators

Evaluation:

Establish a regular and timely communication process as we revise the Teacher and Principal Evaluation Instruments to include at least a 33% focus on student academic progress.

- Evidence of ease of transition;
- Evidence of teacher and principal understanding of the new requirements;
- Raise the awareness and understanding of student assessment and measures of student achievement with all teachers and administrators;
- Evidence of training conducted at school sites on student assessment and student achievement data;
- Garner support for the new evaluation system. Establish understanding of new Arizona State Law requirements regarding teacher and principal evaluation;
- Moderate concern or lack of concern about new requirements;
- Questions raised are detail and implementation oriented.

2015 TASK FORCE MEMBERS

Amy Hamilton, Task Force Chair, Arizona State Board of Education Member, and District Teacher

Roger Jacks, Task Force Vice Chair, Arizona State Board of Education Member, and District Superintendent

Vicki Balentine, University of Arizona

Ken Burbank, Charter School Teacher

Deb Duvall, Arizona School Administrators (ASA)

Dick Foreman, Arizona Business Education Coalition (ABEC)

Rebecca Gau, Stand For Children Arizona

Cecilia Johnson, Arizona Department of Education (ADE)

Ildiko Laczko-Kerr, Arizona Charter Schools Association

Wendy Miller, Charter School Principal

Andrew Morrill, Arizona Education Association (AEA)

Janice Palmer, Arizona School Board Association (ASBA)

Cheryl Rogers, District Teacher

Karen Sanders, District Principal

Denton Santarelli, District Superintendent

Tom Tyree, Yuma County Superintendent of Schools

State of Arizona
Department of Education

ARIZONA FRAMEWORK FOR EVALUATING EDUCATOR EFFECTIVENESS FACT SHEET

The Framework

What is the Framework?

The Arizona Framework for Measuring Educator Effectiveness complies with all legal requirements of ARS § 15-203 (A)(38) while also providing LEAs with as much flexibility as possible to develop evaluation systems that meet their individual needs.

Arizona Revised Statute § 15-203(A)(38): The State Board of Education shall…*"on or before December 15, 2011 adopt and maintain a model framework for a teacher and principal evaluation instrument that includes quantitative data on student academic progress that accounts for between thirty-three percent and fifty per cent of the evaluation outcomes and best practices for professional development and evaluator training. School districts and charter schools shall use an instrument that meets the data requirements established by the State Board of Education to annually evaluate individual teachers and principals beginning in school year 2012 – 2013."*

Arizona Framework for Evaluating Educator Effectiveness: http://www.azed.gov/wp-content/uploads/PDF/ArizonaFrameworkforMeasuringEducatorEffectiveness.pdf

What is the definition of "student academic progress"?

Student academic progress is a measurement of student academic performance. These measurements can be either: 1) the amount of academic growth a student experiences during one school year; or 2) a single measure of academic performance, including, but not limited to, formative assessments, summative assessments, and AZ LEARNS profiles.

What is the purpose of the Framework?

The goals for the Framework are:

- To enhance and improve student learning;
- To use the evaluation process and achievement data to drive professional development to enhance teaching, leadership, and student performance.
- To increase data-informed decision making for students and teacher and principal evaluations fostering school cultures where student learning and progress is a continual part of redefining goals for all.
- To use the evaluation process and data to improve teacher and principal performance;
- To incorporate multiple measurements of achievement;
- To communicate clearly defined expectations;
- To allow LEAs to use local instruments to fulfill the requirements of the framework;
- To reflect fairness, flexibility, and a research-based approach;
- To create a culture where data drives instructional decisions.

What are the requirements and recommendations for District and Charter Evaluation Systems?

- When available, data from statewide assessments must be used to inform the evaluation process.
- All assessment data used in educator evaluations must be aligned with Arizona State Standards.
- Districts and charters must include student achievement data for reading and/or math as appropriate; however, student achievement data should not be strictly limited to these content areas.
- Evaluation instruments should integrate student academic progress data with data derived through classroom observations – neither should stand alone.
- All evaluators should receive professional development in the form of Qualified Evaluator Training.
- Districts and charters should provide for the development of classroom-level achievement data for teachers in those content areas where these data are limited or do not currently exist so that all teachers use the Group A framework.
- Districts and charters should develop and provide professional development on the evaluation process and in those areas articulated in Arizona's Professional Teaching and Administrative Standards, as approved by the State Board of Education.

Where do the detention schools fit into the Arizona framework for evaluating educator/principal effectiveness?

The statute applies to school districts and charter schools; they would not apply to juvenile corrections.

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Teacher Evaluations

What are the components for the Teacher Evaluation Portion of the Framework?

For the Teacher Evaluation portion of the Framework, there are three components:

- Classroom-level data – Student Academic Progress
- Teacher Performance
- School-level data

For the classroom-level data portion of the Framework, teachers are categorized as Group A or Group B teachers.

Who are the Group A teachers?

Group A teachers are those with available classroom-level student achievement data that are valid and reliable, aligned to Arizona's academic standards, and appropriate to individual teachers' content areas. If available and appropriate to a teacher's content area, data from statewide assessments (e.g. AIMS, SAT 10, etc.) shall be used as at least one of the classroom-level data elements.

Who are the Group B teachers?

Group B teachers are those with limited or no available classroom-level student achievement data that are valid and reliable, aligned to Arizona's academic standards, and appropriate to individual teachers' content areas.

What is the definition of "classroom-level data?"

Classroom-level data are data limited to student academic performance within an individual classroom or course. These may include AIMS scores, SAT 10 scores, district/school assessments, benchmark assessments, and other standardized assessments. Classroom-level data does NOT include teacher made quizzes or tests for a specific classroom.

How much does classroom-level data count in the final evaluation score for Group A teachers?

For Group A teachers, classroom-level data elements **shall account for at least 33% of evaluation outcomes**. LEAs may increase the weight of these elements as they deem appropriate; however, **the total weight of these data shall not exceed 50% of the total evaluation outcome**. If available and appropriate to a teacher's content area, data from statewide assessments (e.g. AIMS, SAT 10, etc.) shall be used as at least one of the classroom-level data elements. LEAs may determine which additional classroom-level data will be used and in what proportions.

The district or charter must ensure that **multiple data elements are used** to calculate the portion of each teacher's evaluation dedicated to student academic progress

How much does classroom-level data count in the final evaluation score for Group B teachers?

In cases where limited valid and reliable classroom-level data exist, the district or charter must incorporate these data into the final evaluation outcome; however, these data shall be augmented with the use of additional school-level data. School-level data may include aggregate school, grade, or team-level data. **The sum of available classroom-level data and school-level data shall account for between 33% and 50% of evaluation outcomes**.

In cases where no valid and reliable classroom-level data exist, school-level data must account for at least 33% of evaluation outcomes. School-level data may include aggregate school, grade, or team-level data. LEAs may increase the weight of these elements as they deem appropriate; however, **the total weight of these data shall not exceed 50% of the total evaluation outcome**.

The district or charter must ensure that **multiple data elements are used** to calculate the portion of each teacher's evaluation dedicated to student academic progress.

What is the definition of "school-level data?"

School-level data are data limited to student academic performance within an individual school. These may include AIMS scores, SAT 10 scores, district/school assessments, other standardized assessments, and AZ LEARNS profiles.

Is the school-level component of the Framework optional?

The use of school-level data elements is **optional for Group A teachers**. If school-level data are used the total weight of these data shall account for no more than 17% of evaluation outcomes. Additionally, the sum of school-level data and classroom-level data shall not exceed 50% of the total evaluation outcome.

How much does teacher performance count in the final evaluation score for Group B teachers?

The "Teaching Performance" component of the evaluation shall account for **between 50% and 67% of evaluation outcomes**.

Are classroom observations required for the Teacher Performance measure?

The "Teaching Performance" component of the evaluation must be based upon multiple classroom observations. A district's or charter's evaluation instruments must include rubrics for this portion of the evaluation that are aligned to national teaching standards.
http://www.ccsso.org/Documents/2011/InTASC_Model_Core_Teaching_Standards_2011.pdf

What are "Classroom Observations"?

Classroom observations are used to measure observable classroom processes including specific teacher practices, aspects of instruction, and interactions between teachers and students. Classroom observations can measure broad, overarching aspects of teaching or subject-specific or context-specific aspects of practice.

Can survey data be used to measure teacher performance?

Yes, as long as the survey questions align to the InTASC national teaching standards and align to the Framework's definition of "classroom observations."

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Principal Evaluations

What are the components for the Principal Evaluation Portion of the Framework?

For the Principal Evaluation portion of the Framework, there are two required components and one optional component:

- Required Components:
  - School-level data
  - Instructional Leadership Performance
- Optional Component:
  - System/program-level data

How much does school-level data count in the final evaluation score for a principal?

School-level data elements shall account for at least 33% of evaluation outcomes. LEAs may increase the weight of these elements as they deem appropriate; however, the total weight of these data shall not exceed 50% of the total evaluation outcome.

What type of school-level data must be included?

Data from statewide assessments (e.g. AIMS, SAT 10, etc.) **must be included** as at least one of the school-level data elements. Districts or charters may determine which additional school-level data will be used and in what proportions. However, districts and charters must ensure that **multiple data elements are used** to calculate the portion of each principal's evaluation dedicated to student academic progress.

What type of system/program-level data can be used?

A district or charter may choose to incorporate other types of system/program-level data into principal evaluations that focus on student academic performance in specific programs, grade-levels, and subject areas. For example, a district or charter may determine that their principal evaluations will include academic progress data related to third grade reading proficiency rates. **If other types of system/program-level data are used the total weight of these data shall account for no more than 17% of evaluation outcomes**. Additionally, the sum of these data and school-level data shall not exceed 50% of the total evaluation outcome.

How is instructional leadership measured?

The "Leadership" component of the evaluation **must be based upon multiple observations of a principal's performance**. A district's or charter's evaluation instrument must include rubrics for this portion of the evaluation that are aligned to ISLLC national administrator standards. http://www.ccsso.org/Documents/2008/Educational_Leadership_Policy_Standards_2008.pdf

How much does instructional leadership count in the final evaluation score for principals?

The "Leadership" component of the evaluation must account for between 50**% and 67% of evaluation outcomes**.

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Resources

Developing a District Evaluation Systems

- **A Practical Guide to Designing Comprehensive Teacher Evaluation Systems --**A Tool to Assist in the Development of Teacher Evaluation Systems http://www.azed.gov/highly-qualified-professionals/files/2011/09/practicalguideevalsystems.pdf
- **Getting it Right: A Comprehensive Guide to Developing and Sustaining Teacher Evaluation and Support Systems**http://www.nbpts.org/userfiles/file/NBPTS_Getting-It-Right.pdf

Teacher Performance

- **Repository for Arizona Evaluation Instruments & Tools** http://www.azed.gov/highly-effective-teachers-leaders/repository-az-evaluation/
- **Guide to Teacher Evaluation Products** http://resource.tqsource.org/GEP/
- **Great Teachers and Leaders: State Considerations on Building Systems of Educator Effectiveness** http://find.ed.gov/search?q=State+Considerations+on+Building+Systems+of+Educator+Effectiveness&client=default_frontend&output=xml_no_dtd&proxystylesheet=default_frontend&sa.x=27&sa.y=15
- **North Carolina Teacher Evaluation Process** http://www.ncpublicschools.org/docs/profdev/training/teacher/teacher-eval.pdf
- **Using Performance-Based Assessment and Value-Added Models to Identify and Support High-Quality Teachers in Charter School Contexts** http://www.charterschoolcenter.org/sites/default/files/1170%20NCS%20Key%20Issues_Perf-Based%20Value%20Added%20d3.pdf

Principal Performance

- **State Policies and Examples of Best Practices in Principal Evaluation** http://www.tqsource.org/webcasts/201106Workshop/Presentations/ConcurrentSession1_StatePoliciesInPrincipalEval.pdf
- **Principal Leadership Performance Review: A Systems Approach** http://www.sai-iowa.org/storage/PrinEval.pdf
- **Evaluating Teacher/Leader Effectiveness—A Webinar** http://www.tqsource.org/presentationsFromField/pdfs/PresentationToWashingtonTeacher-PrincipalEvaluationProject_April_21_2011.pdf
- **Vanderbilt Assessment for Leadership in Education** http://www.valed.com/index.html
- **North Carolina Principal Evaluation Process** http://www.dpi.state.nc.us/profdev/training/principal/
- **Evaluating Charter School Principals** http://www.charterschoolcenter.org/sites/default/files/1163_NCS_Key_Issue_Evaluating_Principals_d3.pdf

Student Academic Progress

- **Measuring Teachers' Contributions to Student Learning Growth for Non-tested Grades and Subjects** http://www.azed.gov/highly-qualified-professionals/files/2011/09/measuringteacherscontributionsinnontestedsubjects.pdf
- **Challenges in Evaluating Special Education Teachers and English Language Learner Specialists** http://www.tqsource.org/publications/July2010Brief.pdf

- **Measuring Student Growth for Teachers in Non---Tested Grades and Subjects: A Primer** http://www.swcompcenter.org/educator_effectiveness2/NTS_PRIMER_FINAL.pdf
- **Diving into the Arts**: **Measuring Student Growth in Non-tested Subject Areas** http://www.azed.gov/highly-qualified-professionals/files/2011/10/divingintothearts.pdf
- **Characteristics of Sound Classroom Assessment--Arts Assessment Training Series** http://www.azed.gov/highly-qualified-professionals/files/2011/10/soundclassroomassessment.pdf
- **ITEM POOL AND ITEM DEVELOPMENT TRAINING PACKAGE--CCSSO/SCASS ARTS EDUCATION ASSESSMENT CONSORTIUM** http://www.azed.gov/highly-qualified-professionals/files/2011/10/scassartsitemdeveltrainingmanual.pdf
- **Alternate assessments for special education students in the Southwest Region states** http://ies.ed.gov/ncee/edlabs/regions/southwest/pdf/REL_2008044.pdf

- CBI Evaluation of Superintendent: The superintendent shall provide each member of the board a copy of the evaluation instrument not later than November 10.
  - o Observation instruments to be developed for central office staff that include a superintendent evaluation instrument will need to be completed by October or a policy change would be needed.

- DKB Salary Deductions:
  - o Deductions and redirections have been authorized by the board. If salary compensation was awarded upfront and then deducted later if performance was not achieved, then a policy change would be needed.

- GBJ Personnel Records: Materials obtained prior to an employee's employment, such as confidential recommendations or interview notes, will not be available for review by the employee.
  - o The policy may need to be amended to include performance task and/or interview notes or ratings as part of promotion or assignment of employees already employed.

- GBK and GBK-R Staff Grievances [Nadaburg]: A grievance is a complaint by a district employee alleging a violation or misinterpretation, as to the employee, of any district policy or regulation that directly and specifically governs the employee's terms and conditions of employment. Terms and conditions of employment mean the hours of employment, the compensation therefor, including fringe benefits, and the employer's personnel policies directly affecting the employee.
  - o Because compensation changes in the past have typically only improved salaries for educators, there may be more grievances with a performance-based pay structure.

- GCB Professional Staff Contracts and Compensation: Salaries in the district will be differentiated in relationship to duties and responsibilities.
  - o The policy may need to be adjusted to differentiate based on performance as an added criteria.

- GCBA Professional Staff Salary Schedules:
  - o Initial placement on salary and advancement on salary schedule vertically and horizontally will need to be adjusted in policy to account for changes in the performance pay model. Denial for advancement and the reasons listed in policy may also need to be adjusted to include performance classifications. District will need to consider revisions to this policy and other related policies as it allows advancement on the salary schedule for completion of professional growth hours, graduate and undergraduate coursework, and timelines for submitting hours for salary advancement.

- GCI Professional Staff Development: The superintendent may establish local in-service training courses for teachers and other certificated employees in the schools, credit for which may be granted beyond the bachelor's degree in the manner that graduate courses in institutions of higher learning are taken into account. This credit may be granted in cases where the scope, level, quality, and content of the local course is equal to college graduate work and the instructor is qualified to teach on the college level.
  - o Policy adjustment may be appropriate to allow for credit to be allowed for rigorous training provided by MCESA that is not taught by an instructor qualified to teach at the college level.

- GCK: Professional Staff Assignments and Transfers

o Policy revisions may need to be revised to incorporate proposed HCMS strategies related to the transfer of personnel from one school to another.

- GCO Evaluation of Professional Staff Members: Evaluation of Classroom Teachers.

o The current policy states that the district evaluation instrument will include four performance classifications, designated as highly effective, effective, developing, and ineffective. It also requires that the district will involve its certificated teachers in the development and periodic evaluation of the teacher performance evaluation system. This policy does not need to be changed. It needs to be considered in the project management planning to ensure adherence to policy.

Peer Evaluation of Teachers in Maricopa County's Teacher Incentive Fund Program

Anthony Milanowski, Westat
Herbert G. Heneman, III, University of Wisconsin-Madison
Matthew Finster, Westat

Introduction

This case study describes the peer evaluation system the Maricopa County Educational Services Agency (MCESA) is using in the districts participating in its TIF 3 and TIF 4 grants. This brief first discusses the potential advantages and challenges of implementing peer evaluation and then describes the design and evolution of MCESA's peer evaluation process and what is currently known about its impact on teachers and school leaders. It concludes by presenting the lessons MCESA learned in operating the program since the 2012–13 school year.[1] MCESA has been particularly thoughtful in designing a peer evaluation approach that fits the needs of its districts. It has successfully addressed most of the challenges of implementing peer evaluation. While the exact design of this program will not be applicable everywhere, MCESA has learned several lessons that could help other grantees design and implement peer evaluation programs that would further their grant's objectives.[2]

Peer evaluation involves colleagues observing and rating teaching practice and using these ratings as an input in determining the final evaluation rating. For example, if a district requires three observations of a teacher's practice, the peer may do one or two, and the teacher's supervisor (typically a principal or assistant principal) would do the others. Then the supervisor would use the results of each observation to determine the practice rating, or the ratings of each observation would be combined (for example by averaging) to produce a final practice rating.

Peer evaluation can be part of a peer assistance and review (PAR) program, which typically focuses on new or struggling teachers and gives the peer evaluator the responsibility to recommend whether the teacher be continued or dismissed. The final decision is often made by made by a joint association-management committee that also governs and monitors the program (Project on the Next Generation of Teachers, n.d.). However, as in Maricopa County, peer evaluation can be used without being part of a PAR process.

[1] The description of Maricopa County's TIF peer program is based on documents provided by program administrators and conversations with the TIF director, TIF 3 and 4 program managers, peer evaluators, field specialists, the evaluator of the peer evaluators, and two principals. We summarized this information and shared an initial draft with staff of the Maricopa County Educational Services Agency, who suggested corrections where appropriate.

[2] Note that forms of peer evaluation have also been used by other Teacher Incentive Fund grantees, including the Austin (Texas) Independent School District, the District of Columbia Public Schools, Hillsborough Public Schools in Florida, and the Pittsburgh (PA) Public Schools.

Advantages and Challenges of Peer Evaluation

Peer evaluation has several potential advantages for use in TIF-supported teacher evaluation systems:

- Peer evaluators can share the burden of multiple observations with school administrators. Multiple observations support continuous improvement because teachers can apply the feedback they get and to try out the suggestions, then get more feedback on how they are doing and how to further refine their teaching, as well as providing a more reliable estimate of teaching performance.
- Peer evaluators, if matched with teachers on grade level and subject experience, could have a deeper understanding of the teachers' subjects and grades than school administrators. In particular, peer evaluators might have more insight into the content knowledge and content-specific pedagogy required. Peer evaluators could be both more accurate observers of these aspects of teacher practice and could provide more credible feedback as well.
- Peer evaluators could encourage school administrators to make more accurate ratings. Sharing the responsibility for evaluation could make it easier for school administrators to honestly rate low-performing teachers as well as discouraging them from acting on any biases they have for or against particular teachers.

While peer evaluation seems promising, there are several challenges to meet in order to make it work.

- Teachers may be reluctant to have peers in their classroom and subject themselves to potential peer disapproval. They may believe that a peer evaluator from outside the school will not understand the school and the challenges its teachers face. Veteran teachers may resent younger peer evaluators judging their teaching or even providing suggestions. Less skilled teachers might fear that peer evaluators will be better able to detect problems in their teaching.
- School leaders could perceive that sharing evaluation responsibilities with peer evaluators could diminish their authority to run their schools. They could be concerned that evaluators from outside the school would apply a stricter or more lenient standard.
- Teacher organizations could also be concerned that peer evaluation would reduce group solidarity and blur the line between teachers and management. If a peer evaluator gives a low rating that affects another teacher's job, the organization might have to choose whom to support if the rating was disputed.
- Peer evaluators could have difficulty balancing evaluative and coaching roles. Teachers may expect that a peer's primary role is to help them, and many peers may be more comfortable providing help and formative feedback than an evaluation rating that could have consequences for fellow teachers. Yet much of the benefit of peer evaluation could be lost if the evaluative role is removed, reducing the motivation of the teacher to take the feedback and coaching seriously. Writers on performance evaluation have long recognized potential conflict between the evaluator and coach roles (e.g., Meyer, Kay, & French, 1965; Milanowski, 2005; Popham, 1988).
- Ensuring peer evaluators and supervisors rate consistently and provide consistent feedback is a challenge. Peer evaluation will lack credibility and confuse teachers if the two types of evaluators apply different standards when rating or recommend different changes in practice.
- Peer evaluation can be expensive. Not only do evaluator's salaries need to be paid, but there are also training costs.

This report describes how Maricopa County addressed these challenges.

Peer Evaluation Initial Design and Implementation in Maricopa County

Maricopa County's TIF Districts

Maricopa County's TIF districts cover much of the Phoenix, Arizona, metropolitan area. Including both TIF 3 and 4 cohorts, 12 districts with a total of 82 schools are participating in the TIF project. The districts range in size from 1 to 19 schools, all of which had high proportions of students in poverty. Overall, approximately 2,200 teachers participated in the peer evaluation process.

Program Design

The Maricopa County TIF program designed peer evaluation into its teacher evaluation process from the beginning. The initial impetus for peer evaluation came from the insight that in order for teachers to improve their instructional practice, they need content-specific feedback from someone with a high level of skill both in teaching and in sharing actionable feedback with teachers. Other stakeholders in the planning process, including teacher and administrator organizations, the state education agency, and representatives from the districts interested in joining the TIF application, also had concerns. Local teacher organization members raised the issue of the quality of feedback school administrators could provide and put forward the concept of peer support for teachers undergoing evaluation. Teachers were also concerned that one or two observations would not provide enough interaction with the evaluator to improve performance. Stakeholders recognized that, across the multiple districts that would be participating in the TIF 3 grant, school administrators varied substantially in their knowledge of the content taught by the teachers in their schools, as well as their ability to provide useful feedback. Too often, teachers did not see the feedback many administrators provided as useful. During the planning process for the TIF 3 grant, the stakeholders agreed that peer evaluation could address these concerns.

To provide useful, content-specific feedback, MCESA staff came up with the idea of recruiting a cadre of "rock star" teachers. As well as providing better feedback, this cadre could also help improve the accuracy of performance ratings, based on their specific knowledge of the content area of the teachers they would observe. Peer evaluation could also be used to reduce time demands on administrators made by the initial decision to require five observations. (Five were initially chosen to provide enough observations for teachers to apply the feedback they got and have the evaluator observe any improvement and went beyond a change in state law requiring two observations.) To keep principals in the loop, the design committee divided each teacher's observations between the principal and the peer evaluator. Another initial decision was to have the peer evaluators' ratings count in determining teachers' summative evaluation ratings, as well providing formative feedback. Since most teachers have some room for improving their practice, all teachers would receive peer evaluations, not just new or struggling teachers. The peer evaluators would devote their full time to teacher evaluation, without having classroom teaching responsibilities.

Initial Implementation

Peer evaluation began in 2012–13 in the five districts participating in the TIF 3 grant. Both building administrators and peer evaluators used the TIF observation rubric MCESA and its district partners developed. The new rubric covers 22 components of teaching across six domains and has five performance levels. The teaching practice rubric, called the Learning Observation Instrument, is available at: **http://mcesa.schoolwires.net//site/Default.aspx?PageID=316**.

The observation process begins with a preconference at least 24 hours before each observation, followed by the observation and a postconference. Together these activities make up an observation cycle. The preconference collects some evidence relevant to the evaluation standards, and helps the evaluator understand the lesson to be observed. After the observation, the peer evaluator conducts a postconference, in which he/she shares the ratings from the

observation. The evaluator and teacher review the evidence gathered at the preconference and observation. At the postconference, the teacher also shares an analysis of the lesson and any documentation relevant to the lesson. The evaluator also identifies and discusses a reinforcement (an observed action taken by the teacher that would likely have a positive influence on student learning) and a refinement (a suggestion for an action that, if implemented by the teacher, would have a positive impact on student learning).

Peer evaluators do two to three of the required five observations of each teacher, with the building administrator doing the rest. After each observation cycle, peer evaluators share their ratings with building administrators as well as with the teacher they observe. Peer evaluators also enter their ratings into an evaluation information management system. Building administrators do not, however, have to share their ratings with peer evaluators. Peer evaluators' ratings count the same as building administrators' ratings in determining a teacher's instructional practice rating. The ratings made for each observation on each element are combined across observations to determine each element's final score.

Initial Implementation Challenges and Changes in Program Design

Despite careful planning, several problems arose during the first months of peer evaluation in 2012 in the TIF 3 districts:

- Initially, peer evaluators were often rating teachers lower than building administrators and lower than these teachers had been rated in the past. This upset teachers, building administrators, and even some school boards. Many building administrators felt they had to protect their teachers, especially when initial evaluations by peer evaluators were lower than their own ratings and lower than their teachers had received in the past.
- In order to schedule the peer evaluators most efficiently, many teachers were observed by more than one peer evaluator. This limited the peer evaluators' opportunity to build a trusting relationship with the teachers.
- One consequence of the peer evaluators' content specialization was that in some schools several different peer evaluators were required to cover all of grade-level/subject combinations of teachers in the schools. Building administrators were surprised that so many different peer evaluators were coming to their buildings, which made many uneasy. It was hard for them to establish a relationship with the peer evaluators, which limited their level of trust in the peer evaluators' ratings.
- Despite a rigorous selection and training process, some peer evaluators had performance problems, including difficulty interpreting evidence and following the rubrics, interacting with teachers, and gaining building administrator trust.

MCESA and its partner districts responded quickly to these problems.

MCESA made its peer evaluator training more rigorous (as described below), and peer evaluators received more training on establishing relationships with teachers and building administrators. Field specialists did co-observations with those having difficulties. Some peer evaluators were replaced. Peer evaluators were allowed to spend more time coaching teachers outside of the evaluation cycle. This gave teachers concerned about their ratings more guidance on how to improve their performance. It was also welcomed by the peer evaluators, who wanted to provide more coaching. Peer evaluators began to take more active roles in professional development planning and working with school professional learning communities. A related change was to have peer evaluators design professional development modules that they could deliver along with the building administrator. These changes helped to strengthen relationships with building administrators.

MCESA also recognized that it needed much more communication with teachers, building administrators and school boards to ensure support for peer evaluation. To communicate with school boards, MCESA's TIF field specialists (the grant program's primary contact person with each district) attended board meetings and made presentations on TIF and the peer evaluation program. Field specialists and peer evaluators also were encouraged to communicate about the program directly to building administrators, instead of relying on communication with district central office staff to filter down. MCESA asked peer evaluators to meet with teachers before the first observation cycle, to introduce themselves and explain the process, in a pre-preconference, and to meet and introduce themselves to building administrators.

A dispute resolution process was developed for teachers or building administrators to raise disagreements about evaluation ratings made by peer evaluators. Teachers or building administrators first request a conference with the peer evaluator, who discusses the ratings given and explains how the evidence gathered justifies them. However, peer evaluators are not allowed to change their ratings, so that they can't be pressured to change scores. If this conference does not resolve the issue, the MCESA field specialist becomes involved. Almost all disputes have been resolved at this point if not at the initial conference. The care with which peer evaluators record evidence and the option of having the peer evaluator provide additional professional development to the teacher contributed to resolving these disagreements.

Another change was to reduce the number of observation cycles to four in some districts. This allowed caseloads to be reduced and provided peer evaluators with more time for coaching and professional development at the schools. In one of these districts, the peer evaluator and building administrator began doing each of the four observations together. They discuss their ratings, but do not have to come to agreement. Co-observation provides a way for the peer evaluators to educate building administrators about how to observe and use the rubric and for building administrators to educate the peer evaluators about the culture of the school.

MCESA decided to change scheduling to reduce the number of different peer evaluators coming and going to and from each school and to decrease the number of teachers observed by more than one peer evaluator. This helped to ensure teachers received consistent feedback and to allow a relationship of trust to develop. It also helped peer evaluators and building administrators to become more familiar with each other. The cost of these changes was less balanced peer evaluator caseloads. For the 2013–14 school year, caseloads varied from 30 to 75, though 50 teachers per peer evaluator is considered the ideal. Peer evaluators with lower caseloads had opportunities to work on other projects, such as developing professional development programs related to the vision of teaching behind the Learning Observation Instrument.

Another early implementation issue was whether teachers placed on a performance improvement plan by their district should have a peer evaluator. These teachers were typically being considered for dismissal, and some districts did not want to change the expectations of the process for teachers or evaluators. Districts were also concerned that teachers might get different feedback from peer and administrator evaluators. In response to these concerns, some districts do not use peer evaluation in these cases.

MCESA's program managers were able to react quickly because they had established multiple feedback loops to keep informed about how peer evaluation was being implemented. Field specialists provided feedback about how district administrators, building administrators, teachers, and peer evaluators viewed the program. Biweekly peer evaluator meetings offered program managers a regular opportunity to hear from peer evaluators. MCESA also conducted surveys of teachers and principals about what they experienced with peer evaluation and provided the results to the peer evaluators as well as program managers.

MCESA implemented these changes in 2013–14, the second year for TIF 3 districts and the first year for the TIF 4 grantees. Along with more experience with interacting with peer evaluators, the changes substantially reduced the initial opposition from teachers and building administrators.

Though peer evaluation ran much more smoothly in the 2013–14 school year, and with much less opposition, some challenges remain:

- Some senior teachers still resent younger peer evaluators coming in to evaluate them.
- Some schools are still not welcoming to peer evaluators, even for providing professional development.
- Mid-year changes in the peer evaluator assigned to a teacher are still sometimes needed to cover all of the observation cycles or in cases of peer evaluator turnover.
- There is a large amount of work involved to match peer evaluators to teachers and schedule observations.
- MCESA is still working on how to balance the caseloads of the peer evaluators. Many peer evaluators have substantially larger or smaller caseloads than the ideal of 50, and some schools still have as many as 12 peer evaluators involved in the evaluation process. It has proven difficult to balance the need for a content match between the teacher and the peer evaluator with the need to minimize the number of evaluators visiting each school.
- In some schools, peer evaluation has threatened to bring performance issues with teachers that building administrators have not addressed into the open. Some administrators believe they will have trouble replacing poorer teachers pushed out by more rigorous evaluation due to competition with more wealthy districts and those with less rigorous evaluation systems.

Human Capital Management for Peer Evaluators

From the beginning, MCESA and its partner districts recognized that the selection, training, and evaluation of peer evaluators would be an important influence on the success of the initiative. They made substantial investments in developing these human capital management processes specifically for peer evaluators.

Peer Evaluator Recruitment and Selection

Recruiting a sufficient number of qualified candidates was initially challenging. Though MCESA had about 300 applicants, many did not have the combination of content expertise and skill in providing content-related feedback, goal setting, and coaching. It proved to be difficult to find enough recruits in some content areas. MCESA found itself in competition with member districts that employed coaches, and with another TIF grantee in the area that was also looking for coaches. MCESA found that it had to do a lot of networking to find qualified candidates, using staff's connections and word of mouth. The recruitment message emphasized that working as a peer evaluator is an experience candidates can't get elsewhere and can take to other districts.

MCESA uses a multi-step selection process to assess the degree to which candidates for peer evaluator positions possess the competencies needed. Besides the standard job interview, MCESA asked candidates to:

- Complete written exercises describing their qualifications, and how they would create professional development in their content area based on one of the state student content area standards
- View a video of teaching and describe how they would coach the teacher depicted in the video
- Conduct a simulated postobservation conference, with the role of the evaluated teacher being played by another peer evaluator
- Participate in a group activity focused on developing a professional development opportunity based on simulated disaggregated performance evaluation data
- Meet with district staff and begin to build a relationship with them.

Multiple evaluators scored all the activities using rubrics.
Both MCESA staff and the peer evaluators themselves consider this a rigorous selection process that also introduces candidates to the demands of the peer evaluator role. Most of the peer evaluators hired to date have had prior leadership experience, as an instructional coach, professional development developer, or even as a building administrator.

Peer Evaluator Training
Training begins with 30 hours of calibration training involving observing and rating performance as depicted in videos of teachers. Peer evaluators also receive training on conferencing with teachers, including setting goals based on observation data, providing honest feedback, coaching, and building relationships with both the teachers they evaluate and the building administrators they work with. Feedback and coaching training includes role playing to provide additional realism. The training also includes co-observing in live classroom settings, with emphasis on scripting, scoring, selection of postconference objectives, and questioning strategies. Peer evaluators also received training on justifying their ratings based on the evidence they collect.

Training is ongoing. Every other Friday during the school year, peer evaluators gather for a full day of training, including rating additional videos and discussions of how to interpret the evaluation rubric (e.g., how it applies to specific student populations, such as special education students). In order to secure enough videos to use for training, teachers in participating districts were offered feedback and professional development in return for sharing a video. This enabled the trainers to assemble a set of videos representing a wide range of performance levels. Even so, trainers had to stage some videos to secure enough examples of top-level teaching.

Peer evaluators also get informal training through their everyday interactions with their colleagues. MCESA decided to base all of the peer evaluators in a single location in its headquarters building, to allow them to discuss issues and consult with each other informally. One peer evaluator described working with fellow peer evaluators as the equivalent to a university course in teaching improvement.

Peer Evaluator Evaluation
Early on, MCESA and its partner districts recognized the need for a performance evaluation process tailored to the peer evaluator role. A specific evaluation rubric was developed for observing peer evaluators' practice (see the overview in Table 1 below.)

Table 1. Overview of Peer Evaluator Observation Instrument

Domain	Elements	Evidence Collection During
Pre- & Postconference: Data Gathering	Focus on conference objectives	Observation of pre- & postconferences Observation
	Engages teacher in reflection	
	Use of questions	
Pre & Postconference: Reinforcement and Refinement	Provision of feedback	
	Sharing of improvement strategies	
Conference Process	Conference is clear, well, paced, relevant, & engaging	
	Use of oral and body language	
Mutual Trust & Respect	Active listening & establishing a positive relationship	
Observation & Evaluation of Instruction	Scripting accuracy Rating on annual assessor certification	Review of artifacts Annual certification assessment

The elements for peer reviewers that cover observing and evaluating teachers are similar to those in the rubric for school leaders. This sends the message that both types of evaluators are held accountable in the same way for high-quality observations and accurate ratings of teachers.

One specialized evaluator observes all the peer evaluators and rates their practice using the rubric. She observes two sets of pre- and postconferences for each peer evaluator and reviews the artifacts the peer evaluator collects. She reviews two sets of scripts and artifacts to see how well ratings are justified with the evidence collected. Though watching peer evaluators observe was considered, this would be logistically difficult with 40 peer evaluators. Peer evaluators' participation in frequent calibration sessions and a yearly calibration test are considered as measures of rating accuracy. The test includes scripting and rating two videos and suggesting feedback and conferencing topics. Like the teachers they evaluate, the peer evaluators receive a practice score based on their ratings on each of the standards.

Peer evaluators also receive evaluations based on student achievement growth. For 2012–13, their student growth scores were based on the schoolwide growth measures of the schools in which the teachers they evaluated worked. Each of the two schoolwide growth measures for each school was weighed by the percentage of observations the peer evaluator did in each school. Each weighted measure was then summed across schools and the two are combined with the practice rating. The practice rating was weighted at 75% and the two school growth measures were weighted at 15% and 10%. The resulting score was compared to a table of score ranges that gives the overall summative rating associated with each point score. For 2013–14, the student growth attributed to the teachers peer evaluators worked with was used for the student growth component rather than schoolwide growth. The growth score for each teacher was weighted by the time the peer evaluator spends with each. Student growth was weighted 25%, practice 75%.

Using student growth to evaluate peer evaluators has been somewhat controversial. Peer evaluators have been concerned that they have limited influence on the growth of the students of the teachers they evaluate. However, MCESA and its partners believe that if they hold teachers accountable for student growth, the peer evaluators should be held accountable as well. They also believe that peer evaluators' credibility with the teachers would also be reduced if the peers were not evaluated based in part on growth. Peer evaluators recognized this, though it has not eliminated their concern.

Peer Evaluator Compensation

As mentioned above, peer evaluators are MCESA employees. They are not paid on a schedule like teachers in the districts. They are hired at a salary depending on qualifications and prior salary history that is within a range of approximately $60,000 to $81,000 per year. (For reference, the average teacher salary in Arizona was $48,885 for 2012–13.) Peer evaluators are eligible for performance-based compensation based on their overall effectiveness ratings that is comparable to that available to teachers.

Initial Effects of Peer Evaluation

While MCESA does not yet have systematic evidence of the effects of peer evaluation on teacher performance, peer evaluators, building administrators, and field specialists all report some early positive impacts on both building administrators and teachers.

With respect to teachers, anecdotal evidence suggests that:

- Peer evaluators have been able to provide content-specific professional development in districts or schools where this had been rare in the past, due to limited school or district resources.
- Feedback from a credible content expert encourages teachers to seek out assistance from teaching peers and coaches at their schools.
- Feedback and coaching have helped teachers improve specific aspects of their instruction. Peer evaluators and building administrators recognized improvements in practice between the initial observation cycle and later cycles.
- Feedback and coaching from peer evaluators, coupled with the observation rubric, provides a roadmap for new teachers to get up to speed.
- Peer evaluation, in conjunction with the more rigorous evaluation rubric, has encouraged some low-performing teachers, and teachers who do not want to change their practice, to leave the TIF districts.
- In some cases, the peer evaluator's additional evidence and support provided made it easier to dismiss teachers for poor instruction.

Of course, peer evaluation does not always lead to practice improvements. Peer evaluators acknowledge that some teachers remain resistant to feedback, and some building-level administrators are hesitant about peer evaluators providing teacher professional development in their schools.

Because Maricopa County's TIF districts implemented a more rigorous evaluation rubric as well as peer evaluation, many of the effects on teachers cannot be attributed to peer evaluation alone. But it does appear that peer evaluation has facilitated the implementation of a more rigorous evaluation process. Not only do peer evaluators allow a greater number of observations to be done, they may influence building administrators to be more rigorous. Peer evaluators also provide the coaching and content-specific professional development that gives teachers the skills to improve. Having the resources available to improve performance where needed has also likely increased teachers' acceptance of the more rigorous evaluation process.

For building administrators, positive impacts include:

- Allowing the building administrators to complete the required number of observations without overburdening them. Principals have had additional time to get into classrooms and do informal observations, walk-throughs, and coaching.
- Peer evaluators have helped school administrators improve school-based professional development, especially in smaller schools and districts, by helping to plan and conduct professional development at schools as well as providing content-specific professional development to individual teachers.
- Co-observation with peer evaluators and interacting with them around the evidence for ratings has encouraged building administrators to improve their feedback and instructional leadership skills.

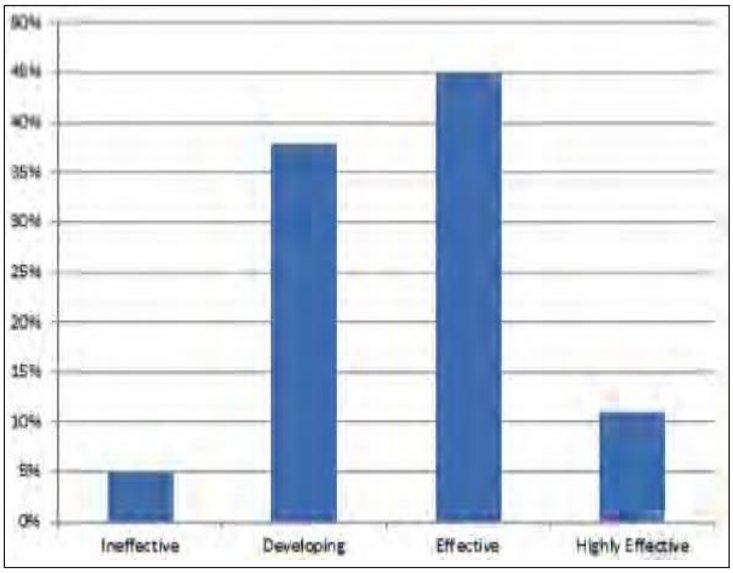
- Conversations with the peer evaluators around evaluation ratings and the supporting evidence helped building administrators understand the rubric. Better understanding should lead to more consistency among raters and potentially higher inter-rater agreement. Initial analyses by the grantee's evaluator showed that the average percentage of exact agreement in 2013--4 was 73 percent, and agreement within one level on the five-level Learning Observation Instrument rating scale was 97 percent.

- Peer evaluators provide confirmation of building administrators' observations by a content expert, which increases their confidence in their ability to use the rubric and identify more and less effective teaching.

- Peer evaluation has made it easier for building administrators to work with low-performing teachers by providing someone with content expertise and from outside the building to confirm their observations. This sends the message to low-performing teachers that the reason for a low rating is low performance, not the principal's bias against the teacher.

Peer evaluation, coupled with evaluator training and holding building administrators accountable, could also have discouraged building administrators' natural tendency toward rating leniency. Figure 1 below shows the distribution of practice ratings from the TIF 3 districts for the 2012–13 school year.

Figure1: Distribution of Teacher Practice Rating in Maricopa County TIF Districts, 2013–14 School Year



This distribution appears to be less weighted to the high end of the rating scale than for many other districts, and more nearly approximates the more symmetric distribution of teacher effectiveness many have expected more rigorous evaluation systems to yield.

One unexpected consequence of the more rigorous evaluation process is that it can encourage good teachers to leave. As one peer evaluator observed, "Some high performers leave, too. They don't want to jump through the hoops." Teachers who receive high evaluations are more marketable outside the TIF districts because the Maricopa evaluation system is perceived as rigorous, and Arizona law allows for prospective employers to receive teachers' past evaluations. High ratings give a teacher an advantage in competing for outside positions. Teachers who have done well

are also aware that they are marketable, and some leave the districts for jobs in districts with less demanding student populations. Some of these effects could be counteracted when the TIF districts fully implement salary systems that give greater weight to performance when determining salary increases.

MCESA and its district partners believe that more rigorous evaluation that includes the use of peers is a means to improve student achievement rather than an end in itself. As one field specialist put it. "We ask building administrators to support change in the evaluation process but we don't know yet if it works. Will teachers rated at high levels in the rubric get higher student achievement? They are taking it on faith now. They want to see that the evaluation results are correlated with student achievement growth." MCESA is working with its TIF program evaluator to examine this question and more systematically assess the effects of the evaluation process.

Costs and Sustainability

Maricopa County developed and refined its peer evaluation program over two years and used it again in the 2014–15 school year. Participating districts and other stakeholders appear to value peer evaluation, and MCESA is likely to sustain it through the end of the TIF 4 grant. Two issues will have to be addressed to sustain the program beyond TIF: cost and control.

Even with the relatively large caseload of each peer evaluator, peer evaluation costs are substantial. Doing two to three observation cycles for the approximately 2,200 teachers in the participating districts requires 40 peer evaluators. They are supported by one full-time position that evaluates them and oversees ongoing training. Based on information received from MCESA, we estimate the overall cost of the program at $4.0 million, or approximately $1,800 per year per teacher evaluated. When the TIF grants end, MCESA and/or the participating districts will have to absorb these costs. The current plan is to make the peer evaluators available to districts in return for a fee to participate in the program. MCESA believes enough districts will participate to sustain at least some version of peer evaluation.

Whether districts decide to participate could also depend on how they see the trade-off between the advantages of taking control of peer evaluation themselves versus enjoying the economies of scale MCESA's running of the program provides. According to MCESA staff, some districts have been interested in housing the program locally to customize the program to their needs and context. However, districts, especially the smaller ones, recognize that it would be difficult to support content specialists in all areas and to provide the level of training and support to peer evaluators that a centrally administered program can.

Whether districts participate could also be influenced by how well peer evaluation coupled with the more rigorous evaluation process actually improves instructional practice. Though there is little if any research that compares the effectiveness of peer evaluation to other forms of professional development, it could be more cost effective. Some studies (e.g., Chambers et al., 2008; Miles et al., 2004; Odden et al., 2002) have suggested that district budgets have substantial amounts dedicated to many different uncoordinated professional development efforts, and districts could reallocate some of these funds to support peer evaluation. Reallocation of ESEA Title II funds is also a possible source of support for peer evaluation.

Lessons From Maricopa County's Peer Evaluation Experience

MCESA staff identified several lessons they have learned about peer evaluation:

- Content knowledge is essential to credibility with teachers and building administrators.
- Credibility and support also depend on building a relationship of trust and familiarity with the teachers and building administrators. Intensive efforts are needed to establish these relationships. Table 2 shows the most important strategies the Maricopa County has used.

Table 2: Communication and Relationship-Building Strategies Maricopa County TIF Used to Support Peer Evaluation

Peer Evaluators	• Hold a conference with teachers before the first observation cycle to introduce themselves and answer teacher questions about the evaluation process • Meet with building administrators before the first observation cycle to introduce themselves and answer questions about the evaluation process • Participate in school walk throughs and attend school staff meetings • Conduct co-observations with building administrators • Co-present professional development modules with building administrators • Attend school professional learning community meetings
Field Specialists and MCESA Program Administrators	• Meet with building administrators to explain peer evaluation and are the first responders to discuss and resolve problems (field specialists) • Provide training on the evaluation rubric and do co-observations with building administrators (field specialists) • Attend school board meeting to explain evaluation program and TIF in general • Access a brochure on the TIF website that summarizes the rational for and operation of peer evaluation • Develop web profiles and fact sheets about the individual peer evaluators to help teachers and building administrators learn more about them • Match and schedule peer evaluators to limit the number of peer evaluators coming into buildings and maintain a single peer evaluator for each teacher • Include video testimonials from building administrators and teachers on the TIF website

- It is important to hire the right people. In addition to having content and coaching skills, peer evaluators have to be able to establish relationships, adapt to program change, feel comfortable giving low scores when needed, and stand up to challenges.
- Peer evaluators need to receive training to build relationships as well as to become experts in the evaluation rubric and have high levels of inter-rater agreement.
- Having a central home base for peer evaluators allows them to interact with one another, fosters mutual support, and helps them learn from each other. MCESA staff found that having a dedicated office or space for peer evaluators in each school also helps establish relationships with school staff.
- Aligning the evaluation of teachers, building administrators, and the peer evaluators reinforces each. Each group's observation rubrics have similar structure and use consistent terminology. The rubrics for peer evaluators and school leaders share similar language about observation and feedback, and school leaders are evaluated on how well they evaluate teachers, including how well they use feedback from peer evaluators to coach and plan professional development for teachers. The peer evaluation results are also used in teachers' Educator Goal Plan, a professional development plan that requires the teacher and the building administrator to establish one goal based on rubric ratings (as well as a student achievement goal).

Meeting the Challenges of Peer Evaluation

The design and implementation of peer evaluation in Maricopa County's TIF districts also has addressed the three challenges mentioned in the introduction: gaining and maintaining support from stakeholders, finding the right balance between the peer evaluators' evaluative and coaching roles, and maintaining consistency between peer and supervisor evaluators.

Stakeholder Support

Two features of the Maricopa program reduced if not eliminated concerns from teacher organizations. First, peer evaluators are employees of MCESA, not the districts. Teacher organizations do not represent the peer evaluators, so that any negative judgments they make about teachers do not pit one member against another. Second, the program has put substantial emphasis on providing teachers with resources to improve performance, so that peer evaluation is not just about judging teachers. The shift toward more coaching and targeted professional development from peer evaluators likely helped maintain teacher organization support.[3]

Potential opposition from administrators was likely mitigated by emphasizing the content expertise of the peer evaluators. Field specialists told us that many building administrators recognized that they did not have the content expertise to provide feedback and coaching to all teachers on all aspects of the observation rubric. These administrators did not regard peer evaluators as threatening their self-esteem as evaluators since they did not see themselves as content experts, but rather as providing complementary expertise. In addition, the building administrators we talked to recognized that they needed help to do four to five required observations, so they welcomed the help of the peer evaluators. MCESA and its partner districts also responded to the concerns of building administrators that surfaced during the initial implementation. They increased communication about the program, emphasized the importance of building relationships with school administrators, retrained or released peer evaluators who had trouble with relationships with teachers or administrators, and changed scheduling practices. Field specialists provided additional support to building administrators, including providing training on the rubrics and aligned elements of the building leader rubrics, and did co-observations to help make administrators more comfortable with the more rigorous rubric and their competence as evaluators. They also responded to complaints and mediated conversations about teachers' ratings between building administrators and peer evaluators. As building administrators experienced these program improvements, and saw some of the positive impacts, opposition declined substantially.

The content specialization of the peer evaluators, the provision of coaching as well as feedback, and peer evaluators' involvement in providing in-school professional development have likely reduced teacher unease with peer evaluation. Content specialization provides credibility as well as the opportunity to get feedback from someone who has a deeper understanding of the subject taught than a building administrator might. The additional coaching and professional development provides teachers with resources to help them improve in areas the ratings suggest need work, and encourages teachers to see the peer evaluator as a supporter as well as an evaluator. Another factor that could promote teacher acceptance is the peer evaluators' employment outside of the district or school. This could make teachers less concerned that they would lose face with peers in their school or district if they received a less than perfect rating. The potential downside, teachers' fears that an evaluator from outside will not understand the school context, has been addressed by the additional effort the peer evaluators have put into becoming familiar with schools and participating in school professional development, professional learning communities, and leadership teams.

[3] It should be noted that due to opposition from its local teacher organization, one district dropped out of the TIF 3 grant, even though the teacher organization represented a minority of the district's teachers. However, peer evaluation is not the primary reason for the opposition.

Balancing Evaluation and Coaching

From an initial emphasis on rating and providing feedback, Maricopa County has moved peer evaluation toward coaching and providing teachers with professional development opportunities. This appears to have increased teacher support and also made the job more rewarding to the peer evaluators. However, it remains to be seen if over time peer evaluators become more lenient in their ratings, due to having invested more effort in their assigned teachers and wanting to see the effort pay off in improved ratings. Some features built into the Maricopa system are likely to discourage leniency. First, peer evaluators receive extensive and ongoing training on applying the observation rubric accurately and consistently. They are also evaluated on their use of evidence and have to pass yearly calibration tests. Second, the rigor of the selection process and the training emphasize the importance of accurate evaluation and honest feedback as well as providing a preview of the job demands. Some who are not comfortable with accurate rating are likely to have self-selected out, or been screened out during the selection process. Third, the degree of interaction among the peer evaluators and the emphasis on improving teaching seems to have created a culture among the peer evaluators that values accuracy as well as assistance. As mentioned above, the practice ratings provided to teachers by the combination of peers and administrators showed a substantial proportion rated less than effective.

Ensuring Consistency of Ratings and Feedback Between Peer Evaluators and Supervisors

As argued above, peer evaluation will lack credibility and confuse teachers if peer evaluators and building administrators apply different standards when rating teachers or recommend different changes in practice. Maricopa County's efforts to avoid this have included training and calibration testing of both peer evaluators and building administrators, having peer evaluators and field specialists do co-observations with administrators, and having peer evaluators share their ratings with building administrators after each observation. Peer evaluators make themselves available to discuss their observations and ratings with building administrators. In addition, similar elements related to teacher evaluation are part of both groups' performance evaluation rubrics.

Conclusion

Based on what we have learned from the Maricopa County program, we believe that other TIF grantees and school districts should consider peer evaluation as a potential contribution to effective educator evaluation. As practiced in the Maricopa County TIF districts, peer evaluation has the potential to support more rigorous performance evaluation as well as improve teaching practice by:

- Providing teachers with content-specific feedback and coaching to help them improve their performance
- Allowing for more observations, which in turn leads to a more reliable assessment of teachers' practice, gives teachers more feedback, and provides multiple opportunities for teachers to apply the feedback and coaching suggestions
- Helping educate building administrators about how to observe teachers and apply the rubrics and providing them with a yardstick against which to measure their own ratings of teaching
- Improving the motivation of building administrators to make accurate evaluation ratings by building their efficacy as observers, confirming their evidence gathering, and sharing the burden of having to deliver results to teachers with performance problems.

It is yet to be seen whether peer evaluation will substantially improve instructional practice in Maricopa County's participating districts. The TIF program evaluation, when completed, should provide some evidence. Anecdotal evidence collected by MCESA staff suggests that some teachers improved their practice as a result of feedback and coaching by peer evaluators, that some teachers felt the process re-invigorated their teaching, and that peer evaluation coupled with a more rigorous evaluation process may have encouraged marginal teachers to leave. However, peer evaluation appears to have contributed to a less skewed distribution of teacher evaluation ratings, in contrast to the tendency seen in many states and districts to have the vast majority of teachers rated effective or highly effective.

Many of the barriers to using peer evaluation can be surmounted with careful planning and program design. To make peer evaluation work, other TIF grantees and school districts interested in using peer evaluation should consider:

- Developing a hiring process that selects people with content, coaching, and relationship-building skills
- Providing ongoing rater calibration training to maintain inter-rater agreement and consistency of feedback
- Training peer evaluators in coaching and relationship building skills as well as in evaluating accurately
- Having peer evaluators go beyond providing ratings and feedback to do coaching and professional development with the teachers they evaluate
- Communicating about the program and building relationships with teachers and school leaders
- Establishing multiple sources of feedback about how peer evaluation is being implemented and received at the school level.

An innovation like peer evaluation also needs dedicated support. In Maricopa County, MCESA's field specialists played a key role in making peer evaluation work. MCESA created the job of field specialist to be the TIF program's primary contact person with each district. The field specialist is "on call" and able to step into issues quickly. They perform a wide range of tasks, including communication liaison between the peer evaluator, building administrator, and district central office staff and helping building administrators understand the evaluation instruments, coaching, and observing. The field specialists also facilitated resolution of issues and differences involving evaluation scores and helped develop shared understandings. Field specialists conducted co-observations with building administrators and helped develop job-embedded professional development plans. Also, the field specialists had informal and private conversations with the building administrators about problems teachers may have with performance, peer review, or the evaluation system. Finally, the field specialists participated in the recruitment and selection of the peer evaluators, communicated with school boards, parents and the press, and aided districts in pay-for-performance program design. As channels of communication to and from districts, they were a key factor in resolving the early implementation issues peer evaluation faced. This kind of dedicated support would be a valuable resource when implementing peer evaluation, as well as other parts of a TIF program.

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TIF Optional High-need School eligibility Checklist	
Requirement 2--Documentation of High-Need Schools: Each applicant must demonstrate, in its application, that the schools participating in the implementation of the TIF-funded Performance-based Compensation Systems are High-Need Schools (as defined in this notice), including High-Poverty Schools, Priority Schools, or Persistently Lowest-Achieving Schools.	
☒ p.21 ☐ (pg.) _____ ☐ _____	For determining the eligibility of a "high-need school," the Department is only aware of data regarding free and reduced price school lunches (FRPSL) as available to schools and LEAs. (a) A list of High-Need Schools in which the proposed TIF-supported Performance-based Compensation Systems would be implemented; AND (b) For each High-Poverty School listed, the most current data on the percentage of students who are eligible for free or reduced-price lunch subsidies under the Richard B. Russell National School Lunch Act or are considered students from low-income families based on another poverty measure that the LEA uses (see section 1113(a)(5) of the ESEA (20 U.S.C. 6313(a)(5))). Data provided to demonstrate eligibility as a High-Poverty School must be school-level data; the Department will not accept LEA- or State-level data for purposes of documenting whether a school is a High-Poverty School; AND (c) For any Priority Schools listed, documentation verifying that the State has received approval of a request for ESEA flexibility, and that the schools have been identified by the State as priority schools.

Extending REIL Change

	LEA-Wide Human Capital Management System	Equitable Access to Effective Educators	Differential Performance-Based Compensation	Job-Embedded & Targeted Professional Learning
Activities	• Implement HCMS strategies to attract, place, retain, and sustain effective educators • Implement LEA-Wide Evaluation & Support System • Career pathways development	• Implement Opportunity Culture Initiative in high-need schools • Establish sustainable pay supplements for *reach extensions*	• Implement differential compensation aligned to common vision of instructional improvement • Pay educators more for extending their reach	• Align PD to evaluation results • Embed educator support via redesigned job roles • Implement enhanced evaluator training
Outputs	• Inter-rater agreement increased • Educators receive clear and specific feedback on performance • LEAs enabled to make informed decisions regarding educator workforce	• Reach extension models identified • Educators identified for advancement • Educator roles re-engineered	• Educators receive differential pay based on effectiveness • Educators have opportunities for advancement	• On-going, differentiated, personalized support aligned to evaluation results • Educator Goal Plans established
Micro Outcomes	• HR alignment increases • More teachers receive exemplary leadership support • Common language for effective teaching & leading • Successful differentiation of educator performance	• High-need schools extend reach of excellent educators • Alignment of LEA-Wide strategies to AZ Equity Plan	• Effective educators teach and lead in high-need schools • Highly effective educators retained	• Changes in educator practice • Increased access to effective educators • More students receive excellent instruction • Enhanced working conditions

Intermediate Outcomes

REIL-Extend LEAs implement a coherent & comprehensive human capital management system that:
★ Retains Talent ★ Accelerates Equity ★ Expands Leadership ★ Extends & Rewards Excellence

Long-Term Outcomes

Percent of highly effective educators increases in high-need schools.

Percent of students receiving highly effective instruction increases in high-need schools.

Percent of students meeting or exceeding rigorous standards increases in high-need schools.

Appendix D – Resumes of Key Personnel

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Dr. Wesley Pak	Page 18

Lori Renfro, Ed.D.

[redacted]

EDUCATION

- Doctor of Education / Educational Leadership, Arizona State University, 2007
- Master of Arts degree in Reading / Elementary Education, Central Michigan University, 1989.
- Bachelor of Arts degree in Elementary Education, Saginaw Valley State University, 1984.

CERTIFICATIONS

Arizona Administrative Certification (Superintendent, Supervisor, Principal) K-12
Standard Elementary (K-8) with Reading Endorsement
English as a Second Language (ESL) Endorsement

ADMINISTRATIVE & TEACHING EXPERIENCE

2010-present **Assistant Superintendent for Human Capital Management Systems**
Maricopa County Education Service Agency, Phoenix, AZ

2010-present **Program Director for TIF3 and TIF4 (Teacher Incentive Fund Grants**)
Maricopa County Education Service Agency, Phoenix, AZ

2009-2010 **Executive Director for Performance-Based Incentives**,
Maricopa County Education Service Agency, Phoenix, AZ

2010-present **Professional Development Leadership Academy Faculty Member**
Arizona Department of Education, Phoenix, AZ

2009-present **Professional Development Leadership Academy School District Coach**
Arizona Department of Education, Phoenix, AZ

2005-2009 **Staff Development Coordinator**, Dysart Unified School District, Surprise, AZ
AVID Program Director, Dysart Unified School District, Surprise, AZ

2002-2005 **Director of Curriculum**, Cartwright School District, Phoenix, AZ
Social Studies Curriculum Coordinator, Cartwright School District, Phoenix, AZ

1998-2001 **K-8 Instructional Coach,** Cartwright School District, Phoenix, AZ

1995-1998 **Fifth Grade Teacher,** Cartwright School District, Phoenix, AZ

1988-1995 **First Grade Teacher,** Cartwright School District, Phoenix, AZ

1985-1988 **First Grade Teacher,** Oscoda Area Schools, Oscoda, MI

LEADERSHIP POSITIONS

2005-2009 Facilitator, Career Ladder Steering Committee; Professional Development Leadership Team; New Teacher Induction Committee

2002-2005 Facilitator, Curriculum Advisory Council / Curricular Task Forces

2003-present Arizona School Solutions Team Member

2000-2001 ASU Mentor Teacher Cadre Instructor for B.E.S.T. Program

2000-2001 ASU Visitation Coach for B.E.S.T. Program

1999-2001 Cartwright School District Mathematics Academy Instructor

1998-1999 Phoenix Urban Systemic Initiative Academy Instructor

1992-1999 Cartwright School District Mentor Teacher

ADMINISTRATIVE ROLES / ACHIEVEMENTS

• Authored 20 performance appraisal instruments and aligned resources for Maricopa Education Service Agency.

• Led Teacher Incentive Fund grant teams resulting in successful awards totaling $110 million.

• Facilitated ***communication and stakeholder involvement*** across schools for all change initiatives and program implementation and refinement for the Dysart Unified and Cartwright Elementary School Districts.

• ***Managed day-to-day operations of performance based compensation and professional development*** systems for Dysart Unified School District.

• ***Implemented teacher evaluation system*** aligned to student learning outcomes via the Career Ladder Program for the Dysart Unified School District

• ***Developed and implemented data management systems*** and ***data reporting structures*** for Cartwright School District (IMSeries) and Dysart Unified School District (iPAL).

• Facilitated development of Dysart Unified School District's Educational Services ***walk-through processes and procedures***.

• Designed and facilitated ***evaluation process*** for ongoing monitoring of the Dysart Continuous Improvement Plan.

• Facilitated development of Dysart Unified School District's first ***long-term professional development plan.***

• Reviewed, refined, and implemented the Dysart Unified School District's **Instructional Coaching Program.**

• Revised and implemented Dysart's Instructional Coach ***hiring process***.

• Facilitated development and delivery of Dysart Unified School District's early-release staff development program.

• ***Designed format and procedures*** for notifying Dysart teachers of the ***calculation of their performance awards.***

• Collaborated with the Instructional Technology department to ***develop and implement Dysart's online professional development registration system***.

• Led development of Cartwright School District's first ***Curriculum Management Plan.***

• Facilitated ***Advisory Council and Steering Committee Meetings*** for the Dysart Unified School District and Cartwright Elementary School District.

• ***Managed curriculum budget*** for Cartwright School District and ***Career Ladder budget*** for Dysart Unified School District.

• ***Provided training and support*** for Dysart and Cartwright teachers and principals on ***how to use data to inform instruction***.

• Conducted ***inter-rater reliability training*** for Dysart principals.

• ***Conducted training*** for Dysart instructional coaches on ***teacher evaluation systems***.

• Led development of ***coherent and clearly articulated scope and sequence documents*** for Cartwright School District.

• Designed structure for ***online curriculum database*** to house the Cartwright School District's curriculum documents.

• Developed and Implemented ***Dysart's Program Evaluation Plan***.

• Designed and implemented the process for ***ongoing curriculum work*** in the Cartwright School District.

• Facilitated development of ***effective school improvement plans*** and provided support for schools in the school development process.

• Led development of ***benchmark assessments***. Constructed test blueprints, wrote test items, created and trained a cadre of teachers to write assessment items for the Cartwright School District.

• Created the means to ***collect walk-through visitation data*** with the use of a handheld computer; set up pilot program for administrators to test the process; ***supported administrators*** as they learned the process.

• Implemented Cartwright School District's newly adopted ***Curriculum Development Cycle***, incorporating staff development and program evaluation as embedded processes within the structure.

PUBLICATIONS

- "Turn on the Light: Observation Tool Connects Teacher Practice with Student Learning," *Journal of Staff Development*, 2014

- "Focus, Feedback, Follow-Through: Professional Development Basics Guide District's Plan," *Journal of Staff Development*, 2009

- "You Changed My Mind About Triangles!," in *Teachers Engaged in Research: Inquiry Into Mathematics Classrooms, Prekindergarten-Grade 2, 2006*

- *The Relationship Between Teacher Career Ladder Participation Levels and Student SAchievement in an Arizona School District,* unpublished doctoral dissertation, Arizona State University, 2007

CONFERENCE PRESENTATIONS

- Local Human Capital Management Practices for Principal Leadership, 2014

- *Focus & Fit: Two Key Strategies to Improving the Educator Workforce,* Governing Board Symposium, 2013

- *Essential Elements of Change: Focus On Teacher Evaluation,* Governing Board Symposium, 2011

- *Supporting High Quality Implementation,* Arizona Department of Education Professional Development Leadership Academy, 2010

- *Professional Learning 101: Provide Teachers with Specific Feedback*, National Staff Development Council Annual Conference, 2009

- *Changing Classroom Practice Through Instructional Dialogue,* National School Board Technology and Learning Conference, 2004

Kristine K. Morris

EMPLOYMENT

Maricopa County Education Service Agency

Chief Deputy Superintendent June 2009-Present

- Reinvented Maricopa County Superintendent of Schools Office, growing agency from 30 to 140 employees.
- Awarded 7 National Association of Counties achievement awards for MCESA programs.
- Received and implemented three federal grants totaling over $113 million to *reward excellence* in 12 LEAs and improve STEM programming in 10 LEAs.
- Developed and launched *Opportunities for Youth* collective impact initiative.

Pendergast Elementary School District #92

Principal July 2004-May 2009

- Improved student learning and achievement.
- Developed and hosted the district's first *professional development school* (PDS).
- Substantially reduced student conduct and behavioral issues on and off campus.

Cartwright Elementary School District #83

Assistant Superintendent Educational Services July 2003-June 2004

- Directed educational programming and services for district, supported and developed 23 school building level administrators.
- Managed and coordinated over $10 million budget.

Director of Student Achievement July 2002-June 2003

- Planned and developed Cartwright's first ELD Program implementation.
- Established structure for delivery of assessment results and process for analysis of student achievement data.
- Developed data management system for instructional planning.

Madison Elementary School District #38

Director of Community Education August 2001-June 2002

- Improved communication between Community Education and school staff members.
- Developed system of checks-and balances for $1 million fee based department.
- Implemented system of evaluation for before-and after-school programs, and the pre-school program and secured NAEYC accreditation.

Director of Student Achievement July 2000-June 2002

- Developed pay for performance plan.
- Served as Principal Investigator for National Science Foundation grant; Treasure Math.

Scottsdale Unified School District # 48

Assistant Principal June 1997--June 2000

- Developed and implemented site emergency plan.
- Implemented attendance incentive program funded by community donations & AZ Tobacco Prevention funds.

EDUCATION

• Master of Educational Leadership	Northern Arizona University	May 1997
• Bachelor of Arts in Secondary Education	Arizona State University	May 1994

RECENT PROFESSIONAL ACTIVITIES

• Board member and inaugural interim Executive Director; Opportunities for Youth	May 2012-Present
• Member; Expect More Arizona Public Engagement Task Force	2012-Present
• Advisory Board Member; Maricopa Regional School District	June 2010-Present
• Board member; Inter-Agency Board of Directors for Juveniles in Transition	Oct. 2012-June 2015
• Task Force member; Valley of the Sun United Way, Hunger Prevention	June 2012- June 2014

CERTIFICATION

Arizona Superintendent, Principal and Teacher Certification

Janice Johnson, Ed.D.

Focus

Experienced in providing leadership, management, and evaluation of effective and efficient implementation of interconnected systems to develop highly skilled and exceptionally effective school and district leaders. Knowledgeable at creating and implementing strategic plans, professional development, and performance-based management systems to ensure increased student academic progress, achievement, and success through implementation of highly effective instruction and challenging curriculum. Exceptional proficiency in developing and implementing mission-based advancement strategies, establishing and expanding organizational identity, planning innovative programs and events, communicating effectively with constituent groups, and leading organizational change.

Education

Ed.D. Educational Leadership Arizona State University, 1995
M.A. Counseling and Psychology University of Pacific 1980
B.A. Liberal Studies University of Pacific 1979

Experience

Administrator Maricopa County Education Service Agency, Phoenix, AZ 2011 to present

- Responsible and accountable for developing highly skilled and exceptionally effective school and district leaders. Oversee the day-to-day operations and provide leadership in coordinating all of the activities associated with the Rewarding Excellence in Instruction and Leadership (REIL) program implemented in alliance districts. Chief spokesperson for the program, successfully communicating the mission and services to all external and internal audiences.

Superintendent Jess Schwartz College Prep, Scottsdale, AZ 2003-2011

- Responsible and accountable for increasing student academic progress, achievement, and success by elevating the professional performance of principals and teachers and through implementation of highly effective instruction and challenging curriculum. Provide leadership, management, evaluation, and implementation of interconnected systems to develop highly skilled and effective upper and lower school principals. Facilitate the successful operation and administration of all aspects of the organization including strategic vision and planning, financial management, fundraising activities, budgeting, staff and independent consultant supervision, human relations, program development oversight, resource development, public relations, marketing and communications, and board relations. Chief spokesperson for the school, successfully communicating the mission and services to all external and internal audiences.

Superintendent Interim Tesseract School, Paradise Valley, AZ 2002-2003

- Responsible and accountable for leading the organizational change process and successful transition from prior beloved head of school to the new, unknown head of school. Demonstrated exceptional ability to build a shared vision, foster development of group goals, and communicate high performance expectations.

Professional Development Consultant Self Employed Scottsdale, AZ 1999-2002

- Consultant for district and individual schools on strategies for improving student achievement by elevating the professional performance of teachers and leaders. Utilized effective and respectful communication skills with a wide range of constituents. Highly successful in my ability to network, develop, and maintain relationships within the communities served.

Assistant Superintendent Cave Creek School District Cave Creek, AZ 1996-1999

- Responsible and accountable for improving student achievement by elevating the professional performance of teachers and leaders within the district. Led the successful operation and administration of all aspects of the District's curriculum, instruction, and assessment including strategic vision and planning. Built collaborative cultures, structured our organization for success, and connected with other agencies to increase instructional leadership capacity.

Principal Cave Creek School District Cave Creek, AZ 1993-1996

- Responsible and accountable for improving student achievement by elevating the professional performance of teachers and leaders within my school. Led the successful operation and administration of all aspects of the School through a mission-driven focus. In charge of financial management, budgeting, staff and independent consultant supervision, human relations, program development oversight, resource development, public relations, marketing, and communications. Moved to an accelerated school model that measurably increased student achievement.

Assistant Principal / Counselor Cave Creek School District Cave Creek, AZ 1992-1993

- Assisted the Principal in the successful operation and administration of all aspects of the School, including improving student achievement by elevating the professional performance of teachers and leaders. Noted for my integrity, strong work ethic, and demonstrated leadership.

Special Education Teacher Cave Creek School District Cave Creek, AZ 1987-1992

- Assisted the School in the successful operation and administration of all aspects of the School's special education programs and services. Most remembered for creating a successful inclusionary buddy program for special education and non special education students.

Special Education Teacher Deer Valley School District Phoenix, AZ 1986-1987

- Noted for my integrity, strong work ethic, and demonstrated leadership qualities.

Special Education Teacher Gavilan Community College Gilroy, CA 1980-1986

- Assisted the college in the successful operation and administration of all aspects of a resource learning center for learning disabled students and of a vocational training center for students with severe challenges. Noted for my integrity, strong work ethic, and leadership qualities.

Certificates, Licenses and Special Training

Arizona Superintendent, Principal, and Teaching Certificates K-12
Arizona Special Education and Structured English Immersion Endorsement
Arizona Fingerprint Clearance Card and Basic First Aid and CPR Training
Arizona Charter Schools Association Charter Starter Program Training
Arizona Association of Fundraising Professionals Training and Workshops
Essential Elements of Instruction and Classroom Management: Trainer of Trainers
Career Ladder Program: founding committee member Cave Creek Unified School District
McDowell Sonoran Conservancy Steward
HOA (Home Owner Association) Board Member
International Charter School of Arizona Board Member

Marc Kuffner

[redacted]

- Multi-tasked and flexible with the ability to visualize total operations, develop and implement the policies and programs necessary to achieve most effective improvements.

- Highly organized, analytical, detail-oriented, creative and resourceful.

- Incorporate an open-door, hands-on leadership style conducive to staff loyalty, maximum productivity and low turnover.

- Encourage and assist with individual development and advancement; Lead By Example.

- Goal and profit-oriented. Set and maintain high personal and performance standards.

- Conscientious attention to detail and precise follow through contribute to prompt, knowledgeable troubleshooting, decision-making and problem resolution.

- Strong interpersonal and communication skills. Positively and productively interact with others at all levels. Present recommendations and proposals in an influential manner; instruction and direction in a concise, understandable fashion.

- Proven professional offering solid record of dependability, motivation, and commitment. Voluntarily put forth whatever efforts necessary to achieve bottom-line results, goals and objectives.

MARC KUFFNER

PROFESSIONAL OVERVIEW:

10/2009 – Current **Assistant Superintendent for Economic Management and Innovation**
Maricopa County Education Service Agency, Maricopa County, Arizona

Provide leadership and guidance to the Arizona Education community focusing on increasing student achievement. Ensure prudent administration of financial and technological affairs on behalf of County School Districts and Charter Schools whose cumulative budget is over $5 billion in both revenue and expenditure. Develop, prepare and present short term and long range financial, strategic and tactical plans. Analyze and interpret financial and operational data for school districts and support groups. Work directly with Legislators, Superintendents and Governing Board Members establishing policies and procedures to improve student achievement.

- Coordinate Tax Rate Setting Recommendations.
- Analyze fiscal impact of proposed legislation, rules, mandates and policies.
- Develop professional development related to financial and business application(s)

08/2007 – 10/2009 **Management and Budget Supervisor**
Office of Management and Budget, Maricopa County, Arizona

Develop innovative solutions to provide resources that enable Departments to carry out the Maricopa County mission. Recommend improvements and modifications in order to implement cost-effective solutions that meet current and future County requirements. Prepare various reports on operations and activities utilized for long and short term strategic decision making. Coordinate with departments on strategic planning, monitoring, reporting and evaluation of activity results and other performance measures. Close coordination with technology group on enterprise solutions. Complete special projects as requested.

- Provided financial analysis for ADP cost and Implementation.
- Worked closely with Departments to Analyze the County's Capital Improvement Program and recommendations for funding.
- Participate and lead formal and informal reviews of County-wide policies and procedures resulting in changes approved by the County Board of Supervisors.

12/2004 – 08/2007 **Management and Budget Analyst**
Office of Management and Budget, Maricopa County, Arizona

Preparation and budgetary oversight for 12 assigned departments and Capital Improvement Plan whose cumulative departmental budget exceeds $780 million in fiscal year 2007. Developed and maintain Excel models to analyze and forecast department budgets. Coordinate with departments on strategic planning, monitoring, reporting and evaluation of activity results and other performance measures. Close coordination with technology group on enterprise solutions. Complete special projects as requested.

- Successful implementation of Equipment Services business plan.
- Worked closely with the Environmental Services department on new fee structure and corresponding budget adjustments.
- Reviewed new program plans and funding requests for all assigned departments. In-depth analysis of Results Initiative Requests for Air Quality, Chief Information Officer, Emergency Management and Clerk of the Board.

06/2002 – 10/2004 **West Coast Regional Director**
Mesa Air Group, Inc., Phoenix, Arizona

Manage daily operational, financial and contractual requirements for 22 employee operated America West Express stations with over 300 employees. Lead liaison for 34 main line America West service locations that handle express operations. Budget and analysis responsibility of $24.5 million encompassing all Express operations in the America West system. Support Sr. Management with financial analysis for controlling operations with strategic decision making. Assist with the development, preparation and presentation of both short term and long range financial and operational planning. Analyze and interpret financial and operational data for Sr. Management and support groups. Participate in the preparation of annual financial plans. Provide Sr. Management with budgeting and financial modeling, trend analysis and variance reporting. Monitor, manage and analyze internal audits and reviews to ensure contract, budget and regulatory compliance. Work directly with airport managers, FAA and TSA to conform to proper airport and security measures. Work directly with Human Resources establishing policies and procedures to enhance employee development and advancement.

- Project Manager and station financial analysis for the implementation of Freedom Airlines, a Mesa subsidiary.
- Project Manager and station financial analysis for the implementation of United Express operations in Denver, CO. Handled staffing, training, equipment, and regulatory compliance for startup service.
- Reduction in headcount and $75,000 per month gaining efficiencies implementing new staffing requirements and FAA manual changes.
- Developed the "Sen'STATIONal' performance measurement tool creating positive challenges in similar size stations.

05/1998 - 06/2002 **ALLIANCE OPERATIONS MANAGER**
Alliance Operations, America West Airlines, Tempe, Arizona

Project Manager for successful design and implementation of a data collection program for all codeshare partners operating as America West Express. Created reporting standards based on this data for statistical purposes. Provide Sr. Management with budgeting and financial modeling, trend analysis and variance reporting. Lead teams for station openings and closings including Express stations and America West markets served by codeshare partners. Work directly with airport managers and FAA to conform to proper airport measures.

- Project Manager for the implementation of Chautauqua Airlines as an America West codeshare partner.
- Support field stations with all operating needs including, but not limited to, ground equipment and training.
- Analyze and recommend capital expenditures for field stations.

05/1998 - 06/2002 **SENIOR FINANCE AND PROCEDURE ANALYST**
Accounting Systems / Procedures and Methods, America West Airlines, Tempe, Arizona

Successfully designed, implemented and integrated automation procedures for labor- intensive methodologies within all revenue accounting operations. Work as liaison with seven revenue accounting departments for the preparation of capital and operational budgets for six cost centers and over 200 employees. Monitor accounts payable and accounts receivable, plus conduct interline station audits for 91 stations. Provide computer network system troubleshooting and support.

- Project Manager for design, purchase and implementation of "Imaging System" for Revenue Accounting Department.
- Selected as trainer for Microsoft PC applications as a result of recognized computer operations proficiency.

03/1995 – 05/1998 - **BUSINESS MANAGER,** Roto-Rooter, Phoenix, Arizona

Profitably directed all areas of operations for this fast-paced, high-volume service company providing scheduled and emergency plumbing services to over 500 major accounts. Conducted large volume customer service including preparation of bids, - proposals, and municipal contract negotiations with the City of Phoenix. Performed accounts payable and accounts receivable, fleet management, inventory and purchasing duties. Conducted scheduling, supervision, and payroll functions for up to 50 employees. Maintained lowest turnover rate of 28 company branches.

- Recognized for achieving 50% growth in revenues and 14.5% increase in profits.

Additional Experience includes positions as Assistant Restaurant GM for Taco Bell, Assistant Legal Administrator for a law firm and customer support for an insurance software company.

EDUCATION:
Master of Business Administration: March 2000
University of Phoenix, Arizona

Bachelor of Science: Management, Concentration: Accounting. May 1992
Bentley College, Waltham, Massachusetts

COMPUTER SKILLS:
Computer Literacy: Windows 10/NT//Vista I Microsoft Office Suite, Project, Visual Basic I Corel I Novell I WordPerfect I Oracle I PeopleSoft I Infinite Visions I CGI Advantage I Business Objects I Internet research I E-mail I Cognos I Hyland and customized software applications.

Laurie A. King

[redacted]

Education

- M.Ed., Educational Technology, NAU, Flagstaff, AZ, 2005
- BA, Elementary Education, Goshen College, Goshen, IN, 1994

Administrative and Leadership Experience

- Director of Learning and Communication Systems
  Maricopa County Education Service Agency, Phoenix, AZ, 2012-present
- Director of Innovative Practices,
  Maricopa County Education Service Agency, Phoenix, AZ, 2009-2012
- Educational Technology Director,
  Dysart Unified School District, Surprise, AZ, 2005-2009
- Instructional Technology Coordinator,
  Cartwright Elementary School District, Phoenix, AZ, 2002-2005
- Science and Mathematics Instructional Coach,
  Cartwright Elementary School District, Phoenix, AZ, 2000-2001
- Teacher on Assignment for Student Discipline, Davidson Elementary School
  Cartwright Elementary School District, Phoenix, AZ, 2001-2002

Teaching Experience

- Third Grade Teacher, Davidson Elementary School
  Cartwright Elementary School District, Phoenix, AZ, 1999-2000
- First Grade Teacher, Davidson Elementary School
  Cartwright Elementary School District, Phoenix, AZ, 1998-1999
- Sixth Grade Teacher, Heatherbrae Elementary School
  Cartwright Elementary School District, Phoenix, AZ, 1996-1998
- Fifth Grade Teacher, Heatherbrae Elementary School
  Cartwright Elementary School District, Phoenix, AZ, 1995-1996

Notable Collaborative Innovations

- **STEM Pro Live!** — January 2015-present, Conceptualized and developed a live stream to connect STEM professionals to middle school classrooms. Worked with Arizona PBS to market state wide and live stream using state of the art networking software.
- **STEM School Immersion Matrix**— January 15, 2011-present, Conceptualized and co-developed the STEM School Immersion Matrix with the Arizona Science Foundation which describes four levels of STEM implementation across eight different school settings such as leadership, teaching, learning, budgeting, etc.
- **REILize Decision Support System** — October 1, 2011-present: Lead the design and cross-agency development process of the integrated data management and instructional support system that supports eleven school districts. The system includes an educator observation component, student assessment component, educator demographic

verification, class roster verification, and educator effectiveness profile. This system is the model and pilot program for what will be the state-wide longitudinal data system being developed by the Arizona Department of Education.

- **Maricopa County Interactive Video Learning** — September 1, 2010-present: Designed an innovative program to deliver standards-based STEM instruction to rural school districts through interactive video learning. Collaborated with experts from 4 different organizations including STEM content and pedagogical experts (Maricopa County Education Service Agency) and rural school teachers and principals (Mobile Elementary, Aguila Elementary, and Paloma Elementary School Districts) on the successful creation and delivery.
- **Arizona TEACH 21** — August 1, 2010-December 31, 2010: Created the online professional development component of a three tiered strategy to inform, educate, and support Arizona teachers on the implementation of the 2009 Technology Standard. Collaborated with experts from 4 different organizations including Technology Integration specialists (Arizona Statewide Instructional Technology Project), online learning experts (Arizona State University), graphic artists (FableVision), and content experts (Maricopa County Education Service Agency) on the conceptualization, creation, and successful implementation of the project.
- **Turning up the H.E.A.T. Summer Institute** — June 2010: Conceptualized and designed a three-day professional learning institute for teachers in order to understand how to create interdisciplinary problem-based learning units by focusing on higher order thinking, engagement strategies, authentic learning, and technology (H.E.A.T.). Collaborated with experts from 6 different organizations including software engineers (Tech 4 Learning), a state-level technology professional organization (Arizona Technology Educators Association) , public television content experts (PBS/Arizona School Services through Educational Technology), technology integration specialists (Arizona Statewide Instructional Technology Project), and content experts (Maricopa County Education Service Agency) on the successful implementation of the institute.
- **iPal, Longitudinal Data System**— June, 2008-October, 2009: Collaborated on the conceptualization, design, and creation of an integrated student information system, learning management system, assessment management system, professional development management system, and curriculum management system. Collaborated with experts in the areas of research and evaluation, student assessments, professional development, curriculum and instruction, instructional technology, and informational technology on the successful implementation of the product.
- **E3 Teacher Academy** — July 2007-October, 2009: Conceptualized and collaboratively created a sixty-hour professional development opportunity for K12 teachers in order to understand and implemented problem-based learning. Collaborated with experts from 3 different organizations including pedagogical experts (INTEL Teach), technology integration specialists (Arizona Statewide Instructional Technology Project), and content experts (Dysart Educational Services) on the successful implementation of the academy.

Professional Activities

- American Graduate- Arizona, Government Representative, Corporation for Public Broadcasting, 2014-present
- City of Phoenix Technology Taskforce, Phoenix, Arizona, 2014-present

- Arizona Education Learning and Accountability System Steering Committee, Phoenix, Arizona, 2013-present
- Co-Chair, Arizona Technology Educators Association, West Valley Chapter, 2008-2009
- Chair, Re-designing library media centers for the 21st Century Committee, Dysart Unified School District, Surprise, AZ, 2007
- Member, Arizona Technology Educators Association Leadership Team, 2006-Present
- Chair, Technology Planning Committee, Dysart Unified School District, Surprise, AZ, 2005-present
- Member, Science Adoption Committee, Dysart Unified School District, Surprise, AZ, 2005-2006
- Member, Information Management Systems Advisory Council, Cartwright School District, Phoenix, AZ, 2002-2005
- Member, Strategic Planning Committee, Cartwright School District, Phoenix, AZ, 2004-2005
- Member, School-Wide Planning Committee, Davidson Elementary School, Cartwright School District, Phoenix, AZ, 2000-2001
- Chair, School Technology Planning Committee, Davidson Elementary School, Cartwright School District, Phoenix, AZ, 1999-2001

RESUME

LORI SHOUGH, ED. D.

EDUCATION

ARIZONA STATE UNIVERSITY, MAY 2010
Doctoral Degree in Educational Leadership and Innovation, 3.85 G.P.A., Dissertation - Standards-Based Teacher Evaluation: A Tool for Professional Development

NORTHERN ARIZONA UNIVERSITY,
DECEMBER 1992
Master's Degree in Educational Leadership, 4.0 G.P.A.

UNIVERSITY OF ARIZONA, MAY 1985
Bachelor of Arts in Elementary Education, Graduated with Distinction, 3.63 G.P.A.

CERTIFICATES

- WA Superintendent
- AZ Superintendent
- Az Principal
- AZ Secondary 7-12 Teaching, English

EXPERIENCE

ASSISTANT SUPERINTENDENT FOR EDUCATIONAL INNOVATION
Maricopa County Education Service Agency, Phoenix, AZ 2011 - PRESENT

Provides leadership as one of five state regional education centers to deliver services and support to 58 districts and 400+ charter schools serving 850,000 students. Collaborates with district superintendents to design innovations for unique district challenges. Leads teams of support in areas such as leadership development, implementation of AZ College and Career Ready Standards, supportive school cultures and equity for vulnerable populations, assessments for the non-tested content areas, and grants development. Explores the use of videoconferencing to extend the reach of master teachers, infuse STEM professionals in classrooms, and make professional learning more accessible to educators. Serves as the principal investigator for a USDOE $3million Investing in Innovation Engineering STEM Identity grant. Partners with Arizona Department of Education, Governor's Office of Education Innovation, other regional centers, Rodel Education Foundation, West Ed, 100Kin10, New York City Leadership Academy, and Expect More Arizona to implement state and national initiatives and advocate for public education.

ASSISTANT SUPERINTENDENT FOR CURRICULUM AND INSTRUCTION
Glendale Elementary School District, Glendale, AZ 2008 - 2011

Instructional Leadership
Together with teachers and administrators, increased the percentage of students meeting or exceeding the standard on state-wide AIMS 3rd-8th grade reading by 7% from SY2008 to SY2010. Implemented a district-consolidated plan, resulting in a change from five schools making AYP and 12 schools not making AYP in SY2009 to 12 schools making AYP and 5 schools not making AYP in SY2010. Reclassified 21% of approximately 2,400 ELLs to proficient in SY2010. Provided on-going instructional leadership development and site-level support to administrators to create a principal and district leader pipeline. Supervised directors of special education, curriculum and instruction, student services, federal programs, and language acquisition.

Collaborative Staff and Community Partnerships and Committees
Facilitated district-wide committees for Performance Pay, Reporting Student Progress, Teacher Evaluation, and Strategic Planning. Participated in the Budget Advisory Committee, Superintendents's Advisory Council, District Boundary Committee, Parent Advisory Council, and Glendale Education Association Leadership.

LORI SHOUGH, ED. D.

EXPERIENCE

ASSISTANT SUPERINTENDENT OF ACADEMIC SERVICES
Pendergast Elementary School District, Phoenix, AZ 2007 - 2008

Supervised the Academic Services department. Facilitated committees for standards-based grading, career ladders, and teacher evaluation. Developed and delivered differentiated professional development for new and continuing school leaders. Restructured Title I, Title II, Group B Weight, and Career Ladder budgets and position coding to improve compliance and program effectiveness. Modeled staffing and budget for implementation of new AZ ELL legislation requirements.

ADMINISTRATOR FOR K-12 OPERATIONS
Peoria Unified School District, Peoria, AZ 2005 - 2007

Site Supervision and Personnel
Supervised 14 schools: 11 elementary schools and three high schools with responsibility for operations, personnel, leadership development, budget, community, and discipline. Served as suspension hearing officer, grievance mediator, investigator for harassment claims, and reviewer for teacher improvement plans and non-renewal recommendations. Co-facilitated hiring of principals and assistant principals. Supervised District Preschool Director and Arts Director.

Instructional Leadership and Personnel Development
Planned and delivered induction principal training, aspiring administrator training, monthly all-district administrator training, and site-based principal coaching. Training topics included continuous school improvement planning, clinical supervision, cooperative learning, and instructional conferencing.

Budget and Facilities
Facilitated committee for preserving district-wide equity standards for special area instructional minutes and identified opportunities for $1 million budget savings through creative scheduling and staffing. Provided budget and master scheduling training to site administrators. Participated in weekly district facility management team meetings to make recommendations for construction, repairs, or renovations and to prioritize budget expenditures from district or bond funds. Collaborated with district facility director to monitor readiness of new schools constructed with bond funds.

PRINCIPAL
Desert Harbor Elementary School, Peoria Unified School District, Peoria, AZ 2002- 2005

Provided focused, job-embedded staff development aligned to school goals. Initiated coaching cycles aligned to professional development with monitoring for effectiveness. Increased parent participation and accessibility to school through changes to school operating procedures, partnership with PTO leadership, and transparency with budget and school improvement plans. Increased community partnerships to expand the school-wide Wildlife Habitat inquiry science program to include an amphitheater, desert tortoise pen, 22' pond for endangered fish, and a Habitat Expo of student-led workshops and docent tours for students and guests. Partnered with the Kennedy Center for the Arts "Changing Education through the Arts" to launch school-wide integration of core subjects and the arts.

EXECUTIVE ASSISTANT TO THE SUPERINTENDENT FOR PARTNERSHIPS AND DEVELOPMENT
Peoria Unified School District, Peoria, AZ 2000- 2002

Revitalized the Peoria Educational Enrichment Foundation 501c(3) through increased donor base, development of website, revision of board by-laws, recruitment of board members, audits of financial records, and initiation of the Against All Odds scholarship awards program. Developed a district-wide grants development and management protocol. Provided interim public relations department leadership with the District's override election and district Town Hall.

LORI SHOUGH, ED. D.

EXPERIENCE

ASSISTANT PRINCIPAL
Desert Harbor Elementary School, Peoria Unified School District, Peoria, AZ 1995-1997 and 1998-2000

Acquired private and public donations and grant awards totaling over $125,000 to construct a one-acre wildlife habitat. Developed curricular materials and training for environmental inquiry-based science education. Established partnerships with ASU, Desert Botanical Gardens, Phoenix Zoo, Arizona Department of Game and Fish, and the City of Peoria. The Wildlife Habitat program was honored with the Westmarc Award and the Valley Forward Crescordia Award for Environmental Excellence in Education.

INSTRUCTIONAL PROGRAM SPECIALIST
Peoria High School, Peoria Unified School District, Peoria, AZ 1992-1995

Served as a high school instructional coach and district curriculum facilitator for K-12 social studies, arts, and library media specialist curriculum committees.

7-12 LANGUAGE ARTS TEACHER
Peoria Unified School District, Peoria, AZ 1985-1992 and 1997-1998

Designed and implemented an integrated, team-taught language arts block for at-risk students scoring below the 25th percentile on norm-referenced tests resulting in an average of 9.3 NCE gain in achievement on the Iowa Test of Basic Skills. The program was nominated for the Golden Bell award and was replicated at other schools throughout the district.

PROFESSIONAL AFFILIATIONS

Arizona Education Technology Consortium -
Board Secretary
2013-2015

Collaborative Education Partners -
Member 2012-2013; Co-Chair - 2013-2016

Arizona School Administrators - Ed.Services
Secretary/Treasurer - 2010-2013;
President Elect - 2013-2015
President - 2016

College Career Readiness Partnership -
Arizona Delegate - 2013-2014

Peoria Education Enrichment Foundation -
Executive Director to the Board - 2013-2015

Greater Phoenix Education Management Group -
Curriculum and Instruction Co-Chair - 2010-2011

Arizona Public Engagement Task Force -
Steering Committee Member - 2013-2015
Member - 2016

Spalding Education International - Contract Work
Certified Instructor Level 1 & 2 - 1992-1998

REFERENCES

Don Covey, Ed. D.
Maricopa County Superintendent of Schools,
[redacted]

Ron Richards
Pendergast Elementary District, Superintendent, ret., [redacted]

Jack Erb, Ed.D.
Peoria Unified School District, Superintendent, ret., [redacted]

Kevin Hegarty
Laveen School District, Chief Financial Officer,
[redacted]

Steve Johnston
GESD Former Board President, [redacted]

Wesley Pak

[redacted]

EDUCATION

Ph.D. (with Double Distinctions), Organization, Information & Learning Sciences
December 2013
University of New Mexico
Dissertation: Predicting Adoption of Telemedicine by Veterans Affairs Mental Health Professionals

M.B.A., Business Administration, May 2008
University of Phoenix

B.S., Information System Management, May 2002
University of Maryland

AWARD & DISTINCTION

University of New Mexico, Convocation Speaker, 2013

University of New Mexico, Distinction - Doctoral Dissertation, 2013

University of New Mexico, Distinction - Doctoral Comprehensive Exams, 2012

Computerworld Award, The Computerworld Honors Programs, 2011

21st Century Awards for Best Practices in Distance Learning,
The United States Distance Learning Association, 2010

Computerworld Award, The Computerworld Honors Programs, 2008

Transforming Care Delivery at the Point of Care Award, eHealth, 2008

PROFESSIONAL EXPERIENCE

Research and Evaluation Director,
The Maricopa County Education Service Agency (MCESA), June 2014 – Current

- Collaborate with the Arizona Department of Education and Maricopa County Schools to access, aggregate, and warehouse student and educator data. Use available technologies to create systems to aggregate and disaggregate student information data. Initiate research projects to inform MCESA initiative development.

- Conduct research and evaluation relative to MCESA's Goals and Initiatives.
- Apply statistical analysis and appropriate research methods to analyze program data and assist in the identification of next steps. Assist districts in the creation and/or acquisition of summative and formative assessments for all content areas.
- Oversee the assessment of current data management systems in MCESA partner districts in collaboration with MCESA staff and federal and state program directors. Create data management systems in MCESA, in collaboration with MCESA staff and federal and state program directors that will enable agency to make informed decisions, report progress, and measure success.

Adjunct Professor, University of New Mexico, May 2012 – Current

- Teach classes including healthcare IT, creativity and technical design, instructional multimedia, and workplace training
- Mentor graduate students who are working on their MBA, Master, & PhD degrees

Director of IT, University of New Mexico, Health Sciences Center, Oct 2006 – Oct 2012

- Built the University of New Mexico Health Sciences Center's Telemedicine infrastructure.
- Collaborated with numerous universities and healthcare organizations nationally and internationally as part of the ECHO (Extension for Community Healthcare Outcomes) program.
- Managed a team of programmers and IT analysts

President, Wescom Wireless, Vallejo, CA, Sep 2002 – July 2006

- Designed and implemented a wireless internet service company
- Built local and wide wireless area network

TEACHING EXPERIENCE

Adjunct Faculty, University of New Mexico, June 2012 – Current

The Anderson School of Management
Healthcare IT (MGMT 639)
Acquiring a conceptual and practical understanding of health information technology including health informatics, population health management, meaningful use, CPOE, CDSS, PHR, HIPPA, telehealth, and games for Health.

Organization, Information & Learning Sciences
Mastery (OILS 593)
Unwrapping the mystery behind developing talents and discussing various learning theories and training methods to foster superior individualized instruction.

Instructional Multimedia (OILS 501)

Introduction to computer based learning environments incorporating multiple forms of media. Students study the theories applicable to multimedia learning, gain practical skills for implementing simple systems, and design a large scale multimedia learning environment.

Contemporary Instructional Technologies (OILS 500)
An overview of contemporary instructional technologies and how they can be utilized to improve the effectiveness of instruction. Students will gain expertise in selecting and using appropriate instructional technologies supporting the achievement of performance-based objectives.

Workplace Training (OILS 470)
Introduction to the concepts of training in the corporate sector.

Creativity and Technical Design (OILS 420)
Design theory and principles as applied to the research and development functions of industry. Product development via team organization, brainstorming, data analysis, oral presentations and creative problem solving.

PUBLICATION

Arora, S., Thronton, K., Murata, G., **Pak, W**., Deming, P., Kalishman, S., … Qualls, C. (2011). Outcomes of Treatment for Hepatitis C Virus Infection by Primary Care Providers. *The New England Journal of Medicine*, 2199–2207.

Arora, S., Kalishman, S., Thornton, K., Dion, D., Murata, G., Deming, P., … **Pak, W**. (2010). Expanding access to hepatitis C virus treatment--Extension for Community Healthcare Outcomes (ECHO) project: disruptive innovation in specialty care. *Hepatology (Baltimore, Md.)*, *52*(3), 1124–33. doi:10.1002/hep.23802

CERTIFICATION

Microsoft Certified Systems Engineer (MCSE)
Microsoft Certified Database Administrator (MCDBA)
Microsoft Certified Systems Administrator (MCSA)

REFERENCE

Mark Mason, M.B.A., Fiscal Comp. & Innovation Administrator, The Maricopa County Education Service Agency, [redacted], [redacted]

Patricia E. Boverie, Ph.D., Chair and Professor of Organization, Information & Learning Sciences, University of New Mexico, [redacted] [redacted]

Mark Salisbury, Ph.D., Dean of the College of Education, Leadership, and Counseling, University of St. Thomas,[redacted], [redacted]

Appendix E – Letters of Support and Memoranda of Understanding

Attached are letters from 20 agencies and partners and MOUs from participating LEAs.

Letter of Support **Page 1**

Arizona Association of School Business Officials
Arizona Department of Education
Arizona School Boards Association
Maricopa County Regional School District
Wilson Elementary School District
Mobile Elementary School District
Incito Schools
Nadaburg Unified School District
Roosevelt Elementary School District
Kingman Unified School District

Memoranda of Understanding **Page 21**

Maricopa County Regional School District
Mobile Elementary School District
Roosevelt Elementary School District
Wilson Elementary School District
Nadaburg Unified School District
Incito Schools
Opportunity Culture
Kingman Unified School District

AASBO
Arizona Association of School Business Officials

July 6, 2016
Dr. Donald Covey, Superintendent of Schools
Maricopa County Education Service Agency
4041 N. Central Ave., Suite 1200
Phoenix, AZ 85012

Dear Dr. Covey,

On behalf of Arizona Association of School Business Officials (AASBO), I am pleased to submit this letter of support for Maricopa County Education Service Agency's (MCESA) Teacher Incentive Fund (TIF) proposal, REIL-Extend.

AASBO values the ongoing relationship with MCESA and your support of our mission *to promote the highest standards of school business management by providing quality training, legislative leadership, and cultivating the professional stature of its members*. Arizona's education initiatives are in a better place because of the strong alliance our two agencies have developed.

MCESA's work to include the voices of school business officials throughout the REIL and REIL-TNG initiatives has demonstrated your commitment to system-wide support and improvement. We now anticipate the opportunity to join MCESA in *extending excellence* through this next iteration of REIL-Extend.

We look forward to a continuous and productive working relationship with MCESA. We are very enthusiastic and optimistic about REIL-Extend and what it will bring to our state. We fully support and will assist your leadership with implementation of the goals and objectives of the grant proposal.

Sincerely,

[redacted]

Jeff Gadd
Director of Educational Programs
Arizona Association of School Business Officials

Arizona
Department of Education

July 6, 2016
Dr. Donald Covey, Superintendent of Schools
Maricopa County Education Service Agency
4041 N. Central Ave., Suite 1200
Phoenix, AZ 85012

Dear Dr. Covey,

On behalf of The Arizona Department of Education (ADE) Information Technology division, I am pleased to submit this letter of support for Maricopa County Education Service Agency's (MCESA) Teacher Incentive Fund (TIF) proposal, REIL-Extend.

For the past seven years, ADE and MCESA have partnered to develop a state of the art data system that supports our shared vision of *providing all levels of the educational community with the tools and data necessary to support education transformation, academic growth and accountability*. I anticipate the opportunity to continue partnering with MCESA to create technology tools that support effective educators through REIL-Extend.

I look forward to a continuous and productive working relationship with MCESA. I am very enthusiastic about REIL-Extend and what it means for data system development in Arizona. I fully support implementing the goals and objectives of the REIL-Extend grant proposal.

[redacted]

Mark Masterson
Chief Information Officer
Arizona Department of Education

Arizona School Boards Association

July 6, 2016

Dr. Donald Covey, Superintendent of Schools
Maricopa County Education Service Agency
4041 N. Central Ave., Suite 1200
Phoenix, AZ 85012

Dear Dr. Covey,

On behalf of Arizona School Boards Association (ASBA), I am pleased to submit this letter of support for Maricopa County Education Service Agency's (MCESA) Teacher Incentive Fund (TIF) proposal, REIL-Extend.

ASBA values the ongoing relationship with MCESA and our collaboration to support elections and appointments of school governing board members. As a result of our strong relationship over the past eight years years, ASBA and MCESA have accomplished mutual goals by assuring that school districts are equipped with strong governing boards. Arizona's education initiatives are in a better place because of the strong alliance our two agencies have developed.

MCESA's work to include the voices of governing board members throughout the REIL and REIL-TNG initiatives has demonstrated their commitment to system-wide support and improvement. We now anticipate the opportunity to join MCESA in *extending excellence* through this next iteration of REIL-Extend.

ASBA particularly supports REIL-Extend's priority to "use performance-based compensation and related supports for educators to *catalyze* improvements in a district's human capital management and in student outcomes." This priority supports districts in successfully implementing Arizona House Bill 2823 that requires LEAs *implement a performance-based compensation system tied to teacher and principal evaluations*. REIL-Extend will continue to develop clear models for how this law can be implemented effectively.

As a state, we are faced with a growing demand for highly effective teachers and principals who can increase student academic progress, achievement, and success. ASBA and I support MCESA with the implementation of REIL-Extend and commit to continuing as an Advisory Council Member.

[redacted]

Timothy L. Ogle, Ph.D.
Executive Director

Executive Director – Dr. Timothy L. Ogle
President – Kathy Knecht, Peoria USD • **President Elect** Julie Bacon, Paradise Valley USD
Treasurer – Linda Lyon, Oracle ESD • **Secretary** – Lawrence Robinson, Roosevelt ESD
Immediate Past President – Jesus Rubalcava, Gila Bend USD

Quality leadership and advocacy for children in public schools

July 7, 2016
Dr. Donald Covey, Superintendent of Schools
Maricopa County Education Service Agency
4041 N. Central Ave., Suite 1200
Phoenix, AZ 85012

Dear Dr. Covey,

As a representative of the teachers in the Maricopa County Regional School District, I am pleased to submit this letter of support for Maricopa County Education Service Agency's (MCESA) Teacher Incentive Fund (TIF) proposal, REIL-Extend.

Maricopa County Regional School District believes that partnering with MCESA on the REIL-Extend program will ensure that all students in the Maricopa County Regional School District will have access to the very best teachers and leaders. We know that by partnering with MCESA, our best educators will be rewarded for their excellence and our *developing educators* will receive the right amount of support to improve their practice. We know that teachers' voices will be an important component in designing solutions to our challenges and that principals will receive the leadership support they need to practice distributed leadership.

We look forward to a productive working relationship with MCESA. We are very enthusiastic and optimistic about REIL-Extend and what it will bring to our school district.

Sincere[redacted]

Ms. Theresa Franco
Site Lead Teacher – Southwest Key Thomas
Maricopa County Regional School District

July 7, 2016
Dr. Donald Covey, Superintendent of Schools
Maricopa County Education Service Agency
4041 N. Central Ave., Suite 1200
Phoenix, AZ 85012

Dear Dr. Covey,

As a representative of the principals in the Maricopa County Regional School District, I am pleased to submit this letter of support for Maricopa County Education Service Agency's (MCESA) Teacher Incentive Fund (TIF) proposal, REIL-Extend.

Maricopa County Regional School District believes that partnering with MCESA on the REIL-Extend program will ensure that all students in the Maricopa County Regional School District will have access to the very best teachers and leaders. We know that by partnering with MCESA, our best educators will be rewarded for their excellence and our *developing educators* will receive the right amount of support to improve their practice. We believe that REIL-Extend will amplify the principal voice in designing solutions to our leadership challenges.

We look forward to a productive working relationship with MCESA. We are very enthusiastic and optimistic about REIL-Extend and what it will bring to our schools.

[redacted]
Mr. Louis Olivas
Instructional Leader – Southwest Key Schools
Maricopa County Regional School District

WILSON ELEMENTARY SCHOOL DISTRICT NO.7

3025 E. Fillmore Street • Phoenix, Arizona 85008
Phone (602) 681-2200 • Fax: (602-275-7517)

Antonio A. Sanchez, Superintendent

July 7, 2016

Dr. Donald Covey, Superintendent of Schools
Maricopa County Education Service Agency
4041 N. Central Ave., Suite 1200
Phoenix, AZ 85012

Dear Dr. Covey,

As Superintendent of the Wilson'Elementary School District No. 7, I met with the teacher leadership prior to the end of summer school regarding the Teacher Incentive Fund grant and they were very much in favor of being a part of the grant. I am pleased to submit this letter of support for Maricopa County Education Service Agency's (MCESA) Teacher Incentive Fund (TIF) proposal, REIL-Extend on their behalf.

Wilson Elementary School District No. 7 believes that partnering with MCESA on the REIL-Extend program will ensure that all students in the Wilson Elementary School District No. 7 will have access to the very best teachers and leaders. We know that by partnering with MCESA, our best educators will be rewarded for their excellence and our *developing educators* will receive the right amount of support to improve their practice. We know that teachers' voices will be an important component in designing solutions to our challenges and that principals will receive the leadership support they need to practice distributed leadership.

We look forward to a productive working relationship with MCESA. We are very enthusiastic and optimistic about REIL-Extend and what it will bring to our school district.

Sincerely,

[redacted]

Antonio A. Sanchez
Superintendent
Wilson Elementary School District No. 7

July 7, 2016
Dr. Donald Covey, Superintendent of Schools
Maricopa County Education Service Agency
4041 N. Central Ave., Suite 1200
Phoenix, AZ 85012

Dear Dr. Covey,

As a representative of the teachers in the Maricopa County Regional School District, I am pleased to submit this letter of support for Maricopa County Education Service Agency's (MCESA) Teacher Incentive Fund (TIF) proposal, REIL-Extend.

Maricopa County Regional School District believes that partnering with MCESA on the REIL-Extend program will ensure that all students in the Maricopa County Regional School District will have access to the very best teachers and leaders. We know that by partnering with MCESA, our best educators will be rewarded for their excellence and our *developing educators* will receive the right amount of support to improve their practice. We know that teachers' voices will be an important component in designing solutions to our challenges and that principals will receive the leadership support they need to practice distributed leadership.

We look forward to a productive working relationship with MCESA. We are very enthusiastic and optimistic about REIL-Extend and what it will bring to our school district.

Sincere[redacted]

Ms. Theresa Franco
Site Lead Teacher – Southwest Key Thomas
Maricopa County Regional School District

July 7, 2016
Dr. Donald Covey, Superintendent of Schools
Maricopa County Education Service Agency
4041 N. Central Ave., Suite 1200
Phoenix, AZ 85012

Dear Dr. Covey,

As a representative of the principals in the Maricopa County Regional School District, I am pleased to submit this letter of support for Maricopa County Education Service Agency's (MCESA) Teacher Incentive Fund (TIF) proposal, REIL-Extend.

Maricopa County Regional School District believes that partnering with MCESA on the REIL-Extend program will ensure that all students in the Maricopa County Regional School District will have access to the very best teachers and leaders. We know that by partnering with MCESA, our best educators will be rewarded for their excellence and our *developing educators* will receive the right amount of support to improve their practice. We believe that REIL-Extend will amplify the principal voice in designing solutions to our leadership challenges.

We look forward to a productive working relationship with MCESA. We are very enthusiastic and optimistic about REIL-Extend and what it will bring to our schools.

[redacted]
Mr. Louis Olivas
Instructional Leader – Southwest Key Schools
Maricopa County Regional School District

July 13, 2016
Dr. Donald Covey, Superintendent of Schools
Maricopa County Education Service Agency
4041 N. Central Ave., Suite 1200
Phoenix, AZ 85012

Dear Dr. Covey,

As the representative principal at Incito Schools I am pleased to submit this letter of support for Maricopa County Education Service Agency's (MCESA) Teacher Incentive Fund (TIF) proposal, REIL-Extend.

Incito Schools believes that partnering with MCESA on the REIL-Extend program will ensure that all students at Incito Schools will have access to the very best teachers and leaders. We know that by partnering with MCESA, our best educators will be rewarded for their excellence and our *developing educators* will receive the right amount of support to improve their practice. We believe that REIL-Extend will amplify the principal voice in designing solutions to our leadership challenges.

We look forward to a productive working relationship with MCESA. We are very enthusiastic and optimistic about REIL-Extend and what it will bring to our school.

[redacted]

Jayson L. Black
Principal
Incito Schools

July 13, 2016
Dr. Donald Covey, Superintendent of Schools
Maricopa County Education Service Agency
4041 N. Central Ave., Suite 1200
Phoenix, AZ 85012

Dear Dr. Covey,

As a representative of the teachers at Incito Schools I am pleased to submit this letter of support for Maricopa County Education Service Agency's (MCESA) Teacher Incentive Fund (TIF) proposal, REIL-Extend.

Incito Schools believes that partnering with MCESA on the REIL-Extend program will ensure that all students at Incito Schools will have access to the very best teachers and leaders. We know that by partnering with MCESA, our best educators will be rewarded for their excellence and our *developing educators* will receive the right amount of support to improve their practice. We know that teachers' voices will be an important component in designing solutions to our challenges and that principals will receive the leadership support they need to practice distributed leadership.

We look forward to a productive working relationship with MCESA. We are very enthusiastic and optimistic about REIL-Extend and what it will bring to our school district.

Sincerely,

Michelle Lagas
Educator
Incito Schools

Nadaburg Unified School District No. 81

Quality Education: Every Student Every Day!

Curriculum, Instruction, and Assessment

Special Education

Federal Programs

Rewarding Excellence in Instruction and Leadership

Community Education

Gifted Education

Rick Stephen, Superintendent

Curtis McCandlish, Principal, Nadaburg Elementary

Angie Mason, Principal Desert Oasis Elementary

Governing Board

Ann Brown, Member

Sue Dolphin, President

Sandy Jordan, Member

Valerie Serrano, Clerk

Matt Varitek, Member

Our **Mission** is to graduate all students with the knowledge, skills, attitudes and ethics necessary to succeed in the colleges or careers of their choice.

Our **Vision** is to provide a quality education for every student, every day.

32919 Center Street
Wittmann, Arizona 85361

(623) 556-5887
(623) 388-2915, Fax

www.nadaburgsd.org

jscott@nadaburgsd.org

July 13, 2016

Dr. Donald Covey, Superintendent of Schools
Maricopa County Education Service Agency
4041 N. Central Ave., Suite 1200
Phoenix, AZ 85012

Dear Dr. Covey,

As Director of Educational Services of Nadaburg Unified School District, I am pleased to submit this letter of support for Maricopa County Education Service Agency's (MCESA) Teacher Incentive Fund (TIF) proposal, REIL-Extend.

Nadaburg Unified School District believes that partnering with MCESA on the REIL-Extend program will ensure that all students in NUSD will have access to the very best teachers and leaders. We know that by partnering with MCESA, our best educators will be rewarded for their excellence and our *developing educators* will receive the right amount of support to improve their practice. We believe that REIL-Extend will amplify the voice in designing solutions to our leadership challenges.

We look forward to a productive working relationship with MCESA. We are very enthusiastic and optimistic about REIL-Extend and what it will bring to our schools.

Sincerely,

[redacted]

James P. Scott, M.A., M.Ed.
Director of Educational Services

Southwest Elementary School

1111 W. DOBBINS RD.
PHOENIX, AZ 85041
(602) 232-4270
FAX 243-4933

July 7, 2016
Dr. Donald Covey, Superintendent of Schools
Maricopa County Education Service Agency
4041 N. Central Ave., Suite 1200
Phoenix, AZ 85012

Dear Dr. Covey,

As a representative of the principals in the Roosevelt School District, I am pleased to submit this letter of support for Maricopa County Education Service Agency's (MCESA) Teacher Incentive Fund (TIF) proposal, REIL-Extend.

Roosevelt School District believes that partnering with MCESA on the REIL-Extend program will ensure that all students in the Roosevelt School District will have access to the very best teachers and leaders. We know that by partnering with MCESA, our best educators will be rewarded for their excellence and our *developing educators* will receive the right amount of support to improve their practice. We believe that REIL-Extend will amplify the principal voice in designing solutions to our leadership challenges. We look forward to a productive working relationship with MCESA. We are very enthusiastic and optimistic about REIL-Extend and what it will bring to our schools.

Sincerely, [redacted]

Juan Sierra
Principal Southwest School

July 7, 2016
Dr. Donald Covey, Superintendent of Schools
Maricopa County Education Service Agency
4041 N. Central Ave., Suite 1200
Phoenix, AZ 85012

Dear Dr. Covey,

As a representative of the principals in the Roosevelt School District, I am pleased to submit this letter of support for Maricopa County Education Service Agency's (MCESA) Teacher Incentive Fund (TIF) proposal, REIL-Extend.

Roosevelt School District believes that partnering with MCESA on the REIL-Extend program will ensure that all students in the Roosevelt School District will have access to the very best teachers and leaders. We know that by partnering with MCESA, our best educators will be rewarded for their excellence and our *developing educators* will receive the right amount of support to improve their practice. We believe that REIL-Extend will amplify the principal voice in designing solutions to our leadership challenges.

We look forward to a productive working relationship with MCESA. We are very enthusiastic and optimistic about REIL-Extend and what it will bring to our schools.

Sincerely,

[redacted]

Principal
Roosevelt School District

July 7, 2016
Dr. Donald Covey, Superintendent of Schools
Maricopa County Education Service Agency
4041 N. Central Ave., Suite 1200
Phoenix, AZ 85012

Dear Dr. Covey,

As a representative of the principals in the Roosevelt School District, I am pleased to submit this letter of support for Maricopa County Education Service Agency's (MCESA) Teacher Incentive Fund (TIF) proposal, REIL-Extend.

Roosevelt School District believes that partnering with MCESA on the REIL-Extend program will ensure that all students in the Roosevelt School District will have access to the very best teachers and leaders. We know that by partnering with MCESA, our best educators will be rewarded for their excellence and our *developing educators* will receive the right amount of support to improve their practice. We believe that REIL-Extend will amplify the principal voice in designing solutions to our leadership challenges.

We look forward to a productive working relationship with MCESA. We are very enthusiastic and optimistic about REIL-Extend and what it will bring to our schools.

[redacted]

Principal
Roosevelt School District

July 7, 2016
Dr. Donald Covey, Superintendent of Schools
Maricopa County Education Service Agency
4041 N. Central Ave., Suite 1200
Phoenix, AZ 85012

Dear Dr. Covey,

As a representative of the principals in the Roosevelt School District, I am pleased to submit this letter of support for Maricopa County Education Service Agency's (MCESA) Teacher Incentive Fund (TIF) proposal, REIL-Extend.

Roosevelt School District believes that partnering with MCESA on the REIL-Extend program will ensure that all students in the Roosevelt School District will have access to the very best teachers and leaders. We know that by partnering with MCESA, our best educators will be rewarded for their excellence and our *developing educators* will receive the right amount of support to improve their practice. We believe that REIL-Extend will amplify the principal voice in designing solutions to our leadership challenges.

We look forward to a productive working relationship with MCESA. We are very enthusiastic and optimistic about REIL-Extend and what it will bring to our schools.

Sincerely,

[redacted]

Principal
Roosevelt School District

July 7, 2016
Dr. Donald Covey, Superintendent of Schools
Maricopa County Education Service Agency
4041 N. Central Ave., Suite 1200
Phoenix, AZ 85012

Dear Dr. Covey,

As a representative of the principals in the Roosevelt School District, I am pleased to submit this letter of support for Maricopa County Education Service Agency's (MCESA) Teacher Incentive Fund (TIF) proposal, REIL-Extend.

Roosevelt School District believes that partnering with MCESA on the REIL-Extend program will ensure that all students in the Roosevelt School District will have access to the very best teachers and leaders. We know that by partnering with MCESA, our best educators will be rewarded for their excellence and our developing educators will receive the right amount of support to improve their practice. We believe that REIL-Extend will amplify the principal voice in designing solutions to our leadership challenges.

We look forward to a productive working relationship with MCESA. We are very enthusiastic and optimistic about REIL-Extend and what it will bring to our schools.

Sincerely,

[redacted]

Principal J.R. Davis
Roosevelt School District

July 7, 2016
Dr. Donald Covey, Superintendent of Schools
Maricopa County Education Service Agency
4041 N. Central Ave., Suite 1200
Phoenix, AZ 85012

Dear Dr. Covey,

As a representative of the principals in the Roosevelt School District, I am pleased to submit this letter of support for Maricopa County Education Service Agency's (MCESA) Teacher Incentive Fund (TIF) proposal, REIL-Extend.

Roosevelt School District believes that partnering with MCESA on the REIL-Extend program will ensure that all students in the Roosevelt School District will have access to the very best teachers and leaders. We know that by partnering with MCESA, our best educators will be rewarded for their excellence and our *developing educators* will receive the right amount of support to improve their practice. We believe that REIL-Extend will amplify the principal voice in designing solutions to our leadership challenges.

We look forward to a productive working relationship with MCESA. We are very enthusiastic and optimistic about REIL-Extend and what it will bring to our schools.

Sincerely,

[redacted]

Principal
Roosevelt School District

July 7, 2016
Dr. Donald Covey, Superintendent of Schools
Maricopa County Education Service Agency
4041 N. Central Ave., Suite 1200
Phoenix, AZ 85012

Dear Dr. Covey,

As a representative of the principals in the Roosevelt School District, I am pleased to submit this letter of support for Maricopa County Education Service Agency's (MCESA) Teacher Incentive Fund (TIF) proposal, REIL-Extend.

Roosevelt School District believes that partnering with MCESA on the REIL-Extend program will ensure that all students in the Roosevelt School District will have access to the very best teachers and leaders. We know that by partnering with MCESA, our best educators will be rewarded for their excellence and our *developing educators* will receive the right amount of support to improve their practice. We believe that REIL-Extend will amplify the principal voice in designing solutions to our leadership challenges.

We look forward to a productive working relationship with MCESA. We are very enthusiastic and optimistic about REIL-Extend and what it will bring to our schools.

Sincerely,

[redacted]

Principal
Roosevelt School District

July 7, 2016
Dr. Donald Covey, Superintendent of Schools
Maricopa County Education Service Agency
4041 N. Central Ave., Suite 1200
Phoenix, AZ 85012

Dear Dr. Covey,

As a representative of the principals in the Roosevelt School District, I am pleased to submit this letter of support for Maricopa County Education Service Agency's (MCESA) Teacher Incentive Fund (TIF) proposal, REIL-Extend.

Roosevelt School District believes that partnering with MCESA on the REIL-Extend program will ensure that all students in the Roosevelt School District will have access to the very best teachers and leaders. We know that by partnering with MCESA, our best educators will be rewarded for their excellence and our *developing educators* will receive the right amount of support to improve their practice. We believe that REIL-Extend will amplify the principal voice in designing solutions to our leadership challenges.

We look forward to a productive working relationship with MCESA. We are very enthusiastic and optimistic about REIL-Extend and what it will bring to our schools.

Sincerely

[redacted]

Principal
Roosevelt School District

Kingman Unified School District #20

3033 MacDonald Avenue Kingman, AZ 86401
Phone (928) 753-5678 FAX (928) 753-6910

SUPERINTENDENT
Mr. Roger Jacks

July 13, 2016

Dr. Donald Covey, Superintendent of Schools
Maricopa County Education Service Agency
4041 N. Central Ave., Suite 1200
Phoenix, AZ 85012

Dear Dr. Covey,

As superintendent of Kingman Unified School District, I am pleased to submit this letter of support for Maricopa County Education Service Agency's (MCESA) Teacher Incentive Fund (TIF) proposal, REIL-Extend.

Kingman Unified School District believes that partnering with MCESA on the REIL-Extend program will ensure that all students in KUSD will have access to the very best teachers and leaders. We know that by partnering with MCESA, our best educators will be rewarded for their excellence and our *developing educators* will receive the right amount of support to improve their practice. We believe that REIL-Extend will amplify the voice in designing solutions to our leadership challenges.

We look forward to a productive working relationship with MCESA. We are very enthusiastic and optimistic about REIL-Extend and what it will bring to our schools.

Sincerely,

[redacted]

Roger Jacks
Superintendent
Kingman Unified School District #20

Memorandum of Understanding between

MARICOPA COUNTY REGIONAL SCHOOL DISTRICT #509 and

MARICOPA COUNTY EDUCATION SERVICE AGENCY

The Maricopa Regional School District #509, an eligible LEA with high-need schools, Maricopa County Education Service Agency, the lead applicant, hereafter referred to as MCESA, and in conjunction with the United States Department of Education of the Teacher Incentive Fund (TIF) program CFDA: 84-374A, hereafter referred to as USDOE, affirm the commitments and responsibilities of Maricopa County Regional School District and MCESA through this Memorandum of Understanding (MOU), beginning upon award of TIF grant through December 30, 2021, to ensure the implementation and accomplishment of the vision, mission, goals, objectives, and critical work activities for *Extend Excellence*, also referred to as *REIL(Rewarding Excellence in Instruction and Leadership)-Extend.*

OVERVIEW

The TIF program is based on the premise, supported by 20 years of research, that effective teachers are the most critical in-school factor in improving student outcomes, and principals are also key in-school factors for improving student outcomes. However, a teacher shortage is hitting Arizona hard, with recent statistics indicating that up to 62 percent of public schools were reporting unfilled teaching positions, according to an Arizona Department of Education survey. To make matters worse, 23 percent of Arizona educators will be eligible to retire in the next four years, according to the Arizona State Retirement System's October 2014 Fact Sheet. Now, more than ever, we must be selective. If we are going to be short-staffed, it is better to be staffed with the best and the brightest. Only those educators are equipped to make up the difference (Public Impact, 2009).

Given the importance of ensuring that educators are as effective as possible, especially for high-need students, the TIF program uses performance-based compensation and related supports for educators to *catalyze* improvements in a district's human capital management and in student outcomes. The evaluation systems that LEAs use to award performance-based compensation to teachers and principals also provide key information that LEAs can use to develop recruitment strategies for high-need schools, identify educators for advancement, and tailor professional development for teachers and principals in a manner that can promote a more effective workforce.

Implementation of REIL-Extend will pull together a partner alliance focused on promoting equitable access to effective teachers for students from low-income families and minority students across and within schools and districts and assist alliance LEAs in aligning their own strategies for equitable access to excellent educators with Arizona's state equity plan (Ensuring Equitable Access to Excellent Educators in Arizona).

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The Maricopa County Regional School District, in collaboration with other alliance school district members and MCESA, shall mutually agree to the commitments and responsibilities that will accomplish LEA-wide implementation of *REIL-Extend*.

COLLABORATIVE ALLIANCE MEMBER VISION OF *REIL-Extend*

We believe all students can learn far more when they experience excellent instruction consistently. We also believe excellent leadership is a critical working condition for effective teachers. Therefore, over the next five years, REIL-Extend, guided by the clearly articulated Theory of Change, will advance the vision of extending the reach of excellent educators in high-need schools as a core initiative under LEA-wide Human Capital Management System implementation with an Educator Evaluation and Support System at the center. Implementation of REIL-Extend will support the alliance vision to remove students from the shackles of poverty and close achievement gaps that will enable all alliance school district member's students to realize a positive, productive, and economically secure life throughout their adult years.

PRIORITY GOALS:

1. Implement an LEA-wide human capital management system with an embedded educator evaluation and support systems at the center.
2. Implement an LEA-wide teacher and principal performance-based evaluation and support system with significant focus on establishing the common vision of instructional improvement, provision of qualified and certified evaluator training, implementation of procedures to establish and monitor inter-rater agreement, and increasing student academic progress and achievement.
3. Implement an LEA-wide strategic and sustainable performance- based compensation system for attracting, retaining, and sustaining effective educators in high needs schools.
4. Redesign schools to accelerate access to effective educators by extending the reach of excellent educators

As alliance partners, Maricopa County Regional School District and MCESA will adopt the following commitments and responsibilities to ensure the accomplishment of the vision, mission, and goals for *REIL-Extend* in accordance with the United States Office of Education Teacher Incentive Fund CFDA 84.374A.

1.0 MCESA COMMITMENTS AND RESPONSIBILITIES

MCESA makes the following commitments and accepts the following responsibilities to the LEA to ensure the accomplishment of the vision, mission and goals of *REIL-Extend*.

1.1 Coordinate the implementation of the Opportunity Culture Initiative in identified high-need schools, resulting in implementation of reach extensions.

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1.2 Provide access to the REILize Decision Support System (RDSS), a resource for data management and reporting including observation and assessment data capture tools; rostering tools; professional development resources and tools, and human capital management decision making reports.

1.3 Facilitate the LEA's use of its' refined human capital management system to use data for: (1) implementing professional development programs aligned to the common vision of instructional improvement articulated through the REIL (or LEA) Learning and Leading Observation Instruments and the resulting educator goal plans; (2) equitable distribution of educators/equitable access to effective educators; informing recruitment, hiring, placement, retention, promotion and dismissal of educators.

1.4 Provide support for implementation of valid and reliable observation instruments for all educator groups.

1.5 Implement assessment system for use in overall effective rating for all educator groups.

1.6 Validate initial and continuous eligibility of high-need LEA schools.

1.7 Facilitate and implement new strategic and tactical plans of action for Human Capital Management Systems that will attract, retain, motivate, and financially sustain effective and highly effective educators in the LEA's highest needs schools through alignment of governing board policies, administrative regulations, and state statutes.

1.8 Facilitate the refinement/development of a sustainable performance-based compensation system that rewards educator effectiveness, increases retention rates, pays educators more for extending their reach, and follows the principles of human resource alignment.

1.9 Collaboratively develop and implement innovative strategies that build the capacity of teachers, principals, and school leaders to increase student academic progress, achievement, and success, enabling each student to successfully enter post-secondary education and/or demonstrate career-readiness.

1.10 Communicate the vision, mission, goals, objectives, performance measures, and critical work activities to appropriate stakeholders (e.g. teachers, school leaders, principals, district office administrators, support personnel, governing school board members, and the community) in alignment with the REIL stakeholder engagement & communication plan.

1.11 Facilitate the development of the LEA-level stakeholder engagement & communication plan in order to ensure ongoing strategic and tactical plans of action for comprehensive and effective communications.

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1.12 Provide human, technological, and fiscal resources aligned with the approved grant application to ensure that the LEA will accomplish the vision, mission, goals, objectives, critical work activities and evaluation of the program.

1.13 As lead applicant, retain sole responsibility for the management of grant funds and for ensuring the overall implementation of the REIL-TNG project.

2.0 MARICOPA COUNTY REGIONAL SCHOOL DISTRICT COMMITMENTS AND RESPONSIBILITIES

Realizing that continuous improvement requires commitment, Maricopa County Regional School District commits, with due diligence, to the following, in support of the program goals, objectives, performance measures, activities and program evaluation for successful implementation of *REIL-Extend:*

2.1 Implement and support the implementation of MCESA's commitments to the LEA as numerated in items 1.0 through 1.13 above.

2.2 Implement an LEA-wide Human Capital Management System that utilizes data from the performance-based evaluation system to inform educator workforce decision-making in the areas of recruitment, hiring/selection, placement, retention, dismissal, professional development, tenure, and promotion.

2.3 Identify a set of high-need schools to participate in the Opportunity Culture Initiative, including a planning/design period and selection of reach extension models that increase access to highly effective educators.

2.4 Adhere to the guiding principles for each core components of REIL-Extend.

2.5 Utilize a data management system to support the LEA-wide human capital management system by managing the import and entry of data to the REILize Decision Support System (RDSS); managing the quality, fidelity, and timelines of data entered into RDSS.

2.6 Conduct necessary and appropriate observations using the appropriate Learning, Coaching, and/or Leading Observation Instruments.

2.7 Collaborate on the development of observation instrument(s) to support implementation of reach extension models.

2.8 Adopt and implement a sustainable performance-based compensation system that rewards educator effectiveness, increases retention rates, pays educators more for extending their reach, and follows the principles of human resource alignment.

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2.9 Participate in the collaborative development and implementation of innovative strategies that build the capacity of teachers, principals, and school leaders to increase student academic progress, achievement, and success.

2.10 Effectively communicate the components of the program to teachers, school leaders, principals, district office administrators, other school personnel, and the community.

2.11 Ensure involvement and support of the vision, mission, goals, objectives, activities and program evaluation, where appropriate, from teachers, school leaders, principals, other certified personnel and community.

2.12 Utilize a system for monitoring inter-rater agreement and certification for all evaluators of teachers and principals.

2.13 Provide sufficient time for on-going, job-embedded professional learning opportunities for superintendent, central office staff, teachers, and principals.

2.14 Signs/extends appropriate data sharing and data steward agreements.

MUTUAL COMMITMENT:

Maricopa County Education Service Agency and the Maricopa County Regional School District mutually commit, with due diligence, to support each other to ensure the successful implementation and accomplishment of *REIL-Extend's* vision, mission, goals, objectives, and activities.

Signatures on Next Page

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MEMORANDUM OF UNDERSTANING (MOU) BETWEEN MARICOPA COUNTY REGIONAL SCHOOL DISTRICT # 509 AND MARICOPA COUNTY EDUCATION SERVICE AGENCY ON BEHALF OF *REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP—EXTEND (REIL-Extend)* AND THE TEACHER INCENTIVE FUND (TIF) PROGRAM CFDA 84.374A

SIGNATURE PAGE

IN WITNESS WHEREOF, the parties hereto have executed the entire contents of this Memorandum of Understanding on the dates indicated below:

On Behalf of the Maricopa County Regional School Distri

[redacted]

Superintendent

Date: 7-7-2016

[redacted]

President Governing Board

Date: 7-11-16

On Behalf of Maricopa County Service Agency (MCESA):

[redacted]

Dr. Don Covey, Superintendent

Date: 7-11-16

[redacted]

Ms. Kristine Morris, Chief Deputy Supt.

Date: 7-11-2016

All rights reserved by MCESA.

Memorandum of Understanding between

MOBILE ELEMENTARY SCHOOL DISTRICT # 86 and

MARICOPA COUNTY EDUCATION SERVICE AGENCY

The Mobile Elementary School District #86, an eligible LEA with high-need schools, Maricopa County Education Service Agency, the lead applicant, hereafter referred to as MCESA, and in conjunction with the United States Department of Education of the Teacher Incentive Fund (TIF) program CFDA: 84-374A, hereafter referred to as USDOE, affirm the commitments and responsibilities of Mobile Elementary School District and MCESA through this Memorandum of Understanding (MOU), beginning upon award of TIF grant through December 30, 2021, to ensure the implementation and accomplishment of the vision, mission, goals, objectives, and critical work activities for *Extend Excellence*, also referred to as *REIL(Rewarding Excellence in Instruction and Leadership)-Extend.*

OVERVIEW

The TIF program is based on the premise, supported by 20 years of research, that effective teachers are the most critical in-school factor in improving student outcomes, and principals are also key in-school factors for improving student outcomes. However, a teacher shortage is hitting Arizona hard, with recent statistics indicating that up to 62 percent of public schools were reporting unfilled teaching positions, according to an Arizona Department of Education survey. To make matters worse, 23 percent of Arizona educators will be eligible to retire in the next four years, according to the Arizona State Retirement System's October 2014 Fact Sheet. Now, more than ever, we must be selective. If we are going to be short-staffed, it is better to be staffed with the best and the brightest. Only those educators are equipped to make up the difference. (Public Impact, 2009).

Given the importance of ensuring that educators are as effective as possible, especially for high-need students, the TIF program uses performance-based compensation and related supports for educators to *catalyze* improvements in a district's human capital management and in student outcomes. The evaluation systems that LEAs use to award performance-based compensation to teachers and principals also provide key information that LEAs can use to develop recruitment strategies for high-need schools, identify educators for advancement, and tailor professional development for teachers and principals in a manner that can promote a more effective workforce.

Implementation of REIL-Extend will pull together a partner alliance focused on promoting equitable access to effective teachers for students from low-income families and minority students across and within schools and districts and assist alliance LEAs in aligning their own strategies for equitable access to excellent educators with Arizona's state equity plan (Ensuring Equitable Access to Excellent Educators in Arizona).

All rights reserved by MCESA.

The Mobile Elementary School District, in collaboration with other alliance school district members and MCESA, shall mutually agree to the commitments and responsibilities that will accomplish LEA-wide implementation of *REIL-Extend.*

COLLABORATIVE ALLIANCE MEMBER VISION OF *REIL-Extend*

We believe all students can learn far more when they experience excellent instruction consistently. We also believe excellent leadership is a critical working condition for effective teachers. Therefore, over the next five years, REIL-Extend, guided by the clearly articulated Theory of Change, will advance the vision of extending the reach of excellent educators in high-need schools as a core initiative under LEA-wide Human Capital Management System implementation with an Educator Evaluation and Support System at the center. Implementation of REIL-Extend will support the alliance vision to remove students from the shackles of poverty and close achievement gaps that will enable all alliance school district member's students to realize a positive, productive, and economically secure life throughout their adult years.

PRIORITY GOALS:

1. Design and implement an LEA-wide human capital management system with an embedded educator evaluation and support systems at the center.
2. Implement an LEA-wide teacher and principal performance-based evaluation and support system with significant focus on establishing the common vision of instructional improvement, provision of qualified and certified evaluator training, implementation of procedures to establish and monitor inter-rater agreement, and increasing student academic progress and achievement.
3. Implement an LEA-wide strategic and sustainable performance- based compensation system for attracting, retaining, and sustaining effective educators in high needs schools.
4. Promote equitable access to effective educators, in alignment with the state of Arizona Equity Plan.

As alliance partners, Mobile Elementary School District and MCESA will adopt the following commitments and responsibilities to ensure the accomplishment of the vision, mission, and goals for *REIL-Extend* in accordance with the United States Office of Education Teacher Incentive Fund CFDA 84.374A.

1.0 MCESA COMMITMENTS AND RESPONSIBILITIES

MCESA makes the following commitments and accepts the following responsibilities to the LEA to ensure the accomplishment of the vision, mission and goals of *REIL-Extend.*

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1.1 Coordinate the implementation of the Opportunity Culture Initiative in high-need schools, resulting in implementation of reach extensions.

1.2 Provide access to the REILize Decision Support System (RDSS), a resource for data management and reporting including observation and assessment data capture tools; rostering tools; professional development resources and tools, and human capital management decision making reports.

1.3 Facilitate the LEA's use of its' refined human capital management system to use data for: (1) implementing professional development programs aligned to the common vision of instructional improvement articulated through the REIL (or LEA) Learning and Leading Observation Instruments and the resulting educator goal plans; (2) equitable distribution of educators/equitable access to effective educators; informing recruitment, hiring, placement, retention, promotion and dismissal of educators.

1.4 Provide support for implementation of REIL (or LEA-specific) valid and reliable observation instruments for all educator groups.

1.5 Implement REIL (or LEA-specific) assessment system for use in overall effective rating for all educator groups.

1.6 Validate initial and continuous eligibility of the LEA as a high-needs school district.

1.7 Facilitate and implement new strategic and tactical plans of action for Human Capital Management Systems that will attract, retain, motivate, and financially sustain effective and highly effective educators in the LEA's highest needs schools through alignment of governing board policies, administrative regulations, and state statutes.

1.8 Facilitate the refinement/development of a sustainable performance-based compensation system that rewards educator effectiveness, increases retention rates, pays educators more for extending their reach, and follows the principles of human resource alignment.

1.9 Collaboratively develop and implement innovative strategies that build the capacity of teachers, principals, and school leaders to increase student academic progress, achievement, and success, enabling each student to successfully enter post-secondary education and/or demonstrate career-readiness.

1.10 Communicate the vision, mission, goals, objectives, performance measures, and critical work activities to appropriate stakeholders (e.g. teachers, school leaders, principals, district office administrators, support personnel, governing school board members, and the community) in alignment with the REIL stakeholder engagement & communication plan.

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1.11 Facilitate the development of the LEA-level stakeholder engagement & communication plan in order to ensure ongoing strategic and tactical plans of action for comprehensive and effective communications.

1.12 Provide human, technological, and fiscal resources aligned with the approved grant application to ensure that the LEA will accomplish the vision, mission, goals, objectives, critical work activities and evaluation of the program.

1.13 As lead applicant, retain sole responsibility for the management of grant funds and for ensuring the overall implementation of the REIL-TNG project.

2.0 MOBILE ELEMENTARY SCHOOL DISTRICT COMMITMENTS AND RESPONSIBILITIES

Realizing that continuous improvement requires commitment, Mobile Elementary School District commits, with due diligence, to the following, in support of the program goals, objectives, performance measures, activities and program evaluation for successful implementation of *REIL-Extend:*

2.1 Implement and support the implementation of MCESA's commitments to the LEA as numerated in items 1.0 through 1.13 above.

2.2 Implement an LEA-wide Human Capital Management System that utilizes data from the performance-based evaluation system to inform educator workforce decision-making in the areas of recruitment, hiring/selection, placement, retention, dismissal, professional development, tenure, and promotion.

2.3 Identify a set of high-need schools to participate in the Opportunity Culture Initiative, including a planning/design period and selection of reach extension models that increase access to highly effective educators.

2.4 Adhere to the guiding principles for each core component of REIL-Extend.

2.5 Utilize a data management system (that meets established criteria) to support the LEA-wide human capital management system by managing the import and entry of data to the REILize Decision Support System (RDSS) ; managing the quality, fidelity, and timelines of data entered into RDSS.

2.6 Conduct necessary and appropriate observations using the appropriate Learning, Coaching, and/or Leading Observation Instruments (or a viable alternative that meets identified criteria specified in the grant application).

2.7 Collaborate on the development of observation instrument(s) to support implementation of reach extension models.

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2.8 Adopt and implement a sustainable performance-based compensation system that rewards educator effectiveness, increases retention rates, pays educators more for extending their reach, and follows the principles of human resource alignment.

2.9 Participate in the collaborative development and implementation of innovative strategies that build the capacity of teachers, principals, and school leaders to increase student academic progress, achievement, and success.

2.10 Effectively communicate the components of the program to teachers, school leaders, principals, district office administrators, other school personnel, and the community.

2.11 Ensure involvement and support of the vision, mission, goals, objectives, activities and program evaluation, where appropriate, from teachers, school leaders, principals, other certified personnel and community.

2.12 Utilize a system for monitoring inter-rater agreement and certification for all evaluators of teachers and principals.

2.13 Provide sufficient time for on-going, job-embedded professional learning opportunities for superintendent, central office staff, teachers, and principals.

2.14 Facilitates successful signing of data sharing and data steward agreements.

MUTUAL COMMITMENT:

Maricopa County Education Service Agency and the Mobile Elementary School District mutually commit, with due diligence, to support each other to ensure the successful implementation and accomplishment of *REIL-Extend's* vision, mission, goals, objectives, and activities.

Signatures on Next Page

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MEMORANDUM OF UNDERSTANDING (MOU) BETWEEN MOBILE ELEMENTARY SCHOOL DISTRICT # 86 AND MARICOPA COUNTY EDUCATION SERVICE AGENCY ON BEHALF OF *REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP—EXTEND (REIL-Extend)* AND THE TEACHER INCENTIVE FUND (TIF) PROGRAM CFDA 84.374A

SIGNATURE PAGE

IN WITNESS WHEREOF, the parties hereto have executed the entire contents of this Memorandum of Understanding on the dates indicated below:

On Behalf of the Mobile Elementary School District # 86:

[redacted]

Dr. Kit C. Wood, Superintendent

Date: 7/8/2016

[redacted]

Mrs. Pat Blair, Pres. Governing Board

Date: 7/8/2016

[redacted]

Dr. Don Covey, Superintendent

Date: 7/14/16

[redacted]

Ms. Kristine Morris, Chief Deputy Supt.

Date:_____

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Memorandum of Understanding between

Roosevelt ELEMENTARY SCHOOL DISTRICT # 66 and

MARICOPA COUNTY EDUCATION SERVICE AGENCY

The Roosevelt School District #66 an eligible LEA with high-need schools, Maricopa County Education Service Agency, the lead applicant, hereafter referred to as MCESA, and in conjunction with the United States Department of Education of the Teacher Incentive Fund (TIF) program CFDA: 84-374A, hereafter referred to as USDOE, affirm the commitments and responsibilities of _____School District and MCESA through this Memorandum of Understanding (MOU), beginning upon award of TIF grant through December 30, 2021, to ensure the implementation and accomplishment of the vision, mission, goals, objectives, and critical work activities for *Extend Excellence*, also referred to as *REIL(Rewarding Excellence in Instruction and Leadership)-Extend.*

OVERVIEW

The TIF program is based on the premise, supported by 20 years of research, that effective teachers are the most critical in-school factor in improving student outcomes, and principals are also key in-school factors for improving student outcomes. However, a teacher shortage is hitting Arizona hard, with recent statistics indicating that up to 62 percent of public schools were reporting unfilled teaching positions, according to an Arizona Department of Education survey. To make matters worse, 23 percent of Arizona educators will be eligible to retire in the next four years, according to the Arizona State Retirement System's October 2014 Fact Sheet. Now, more than ever, we must be selective. If we are going to be short-staffed, it is better to be staffed with the best and the brightest. Only those educators are equipped to make up the difference. (Public Impact, 2009).

Given the importance of ensuring that educators are as effective as possible, especially for high-need students, the TIF program uses performance-based compensation and related supports for educators to *catalyze* improvements in a district's human capital management and in student outcomes. The evaluation systems that LEAs use to award performance-based compensation to teachers and principals also provide key information that LEAs can use to develop recruitment strategies for high-need schools, identify educators for advancement, and tailor professional development for teachers and principals in a manner that can promote a more effective workforce.

Implementation of REIL-Extend will pull together a partner alliance focused on promoting equitable access to effective teachers for students from low-income families and minority students across and within schools and districts and assist alliance LEAs in aligning their own strategies for equitable access to excellent educators with Arizona's state equity plan (Ensuring Equitable Access to Excellent Educators in Arizona).

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The _____School District, in collaboration with other alliance school district members and MCESA, shall mutually agree to the commitments and responsibilities that will accomplish LEA-wide implementation of *REIL-Extend*.

COLLABORATIVE ALLIANCE MEMBER VISION OF *REIL-Extend*

We believe all students can learn far more when they experience excellent instruction consistently. We also believe excellent leadership is a critical working condition for effective teachers. Therefore, over the next five years, REIL-Extend, guided by the clearly articulated Theory of Change, will advance the vision of extending the reach of excellent educators in high-need schools as a core initiative under LEA-wide Human Capital Management System implementation with an Educator Evaluation and Support System at the center. Implementation of REIL-Extend will support the alliance vision to remove students from the shackles of poverty and close achievement gaps that will enable all alliance school district member's students to realize a positive, productive, and economically secure life throughout their adult years.

PRIORITY GOALS:

1. Design and implement an LEA-wide human capital management system with an embedded educator evaluation and support systems at the center.
2. Implement an LEA-wide teacher and principal performance-based evaluation and support system with significant focus on establishing the common vision of instructional improvement, provision of qualified and certified evaluator training, implementation of procedures to establish and monitor inter-rater agreement, and increasing student academic progress and achievement.
3. Implement an LEA-wide strategic and sustainable performance- based compensation system for attracting, retaining, and sustaining effective educators in high needs schools.
4. Promote equitable access to effective educators, in alignment with the state of Arizona Equity Plan.

As alliance partners, _____ School District and MCESA will adopt the following commitments and responsibilities to ensure the accomplishment of the vision, mission, and goals for *REIL-Extend* in accordance with the United States Office of Education Teacher Incentive Fund CFDA 84.374A.

1.0 MCESA COMMITMENTS AND RESPONSIBILITIES

MCESA makes the following commitments and accepts the following responsibilities to the LEA to ensure the accomplishment of the vision, mission and goals of *REIL-Extend*.

1.1 Coordinate the implementation of the Opportunity Culture Initiative in identified high-need schools, resulting in implementation of reach extensions.

All rights reserved by MCESA.

1.2 Provide access to the REILize Decision Support System (RDSS), a resource for data management and reporting including observation and assessment data capture tools; rostering tools; professional development resources and tools, and human capital management decision making reports.

1.3 Facilitate the LEA's use of its' refined human capital management system to use data for: (1) implementing professional development programs aligned to the common vision of instructional improvement articulated through the REIL (or LEA) Learning and Leading Observation Instruments and the resulting educator goal plans; (2) equitable distribution of educators/equitable access to effective educators; informing recruitment, hiring, placement, retention, promotion and dismissal of educators.

1.4 Provide support for implementation of REIL (or LEA-specific) valid and reliable observation instruments for all educator groups.

1.5 Implement REIL (or LEA-specific) assessment system for use in overall effective rating for all educator groups.

1.6 Validate initial and continuous eligibility of the LEA as a high-needs school district.

1.7 Facilitate and implement new strategic and tactical plans of action for Human Capital Management Systems that will attract, retain, motivate, and financially sustain effective and highly effective educators in the LEA's highest needs schools through alignment of governing board policies, administrative regulations, and state statutes.

1.8 Facilitate the refinement/development of a sustainable performance-based compensation system that rewards educator effectiveness, increases retention rates, pays educators more for extending their reach, and follows the principles of human resource alignment.

1.9 Collaboratively develop and implement innovative strategies that build the capacity of teachers, principals, and school leaders to increase student academic progress, achievement, and success, enabling each student to successfully enter post-secondary education and/or demonstrate career-readiness.

1.10 Communicate the vision, mission, goals, objectives, performance measures, and critical work activities to appropriate stakeholders (e.g. teachers, school leaders, principals, district office administrators, support personnel, governing school board members, and the community) in alignment with the REIL stakeholder engagement & communication plan.

1.11 Facilitate the development of the LEA-level stakeholder engagement & communication plan in order to ensure ongoing strategic and tactical plans of action for comprehensive and effective communications.

All rights reserved by MCESA.

1.12 Provide human, technological, and fiscal resources aligned with the approved grant application to ensure that the LEA will accomplish the vision, mission, goals, objectives, critical work activities and evaluation of the program.

1.13 As lead applicant, retain sole responsibility for the management of grant funds and for ensuring the overall implementation of the REIL-TNG project.

2.0 Roosevelt SCHOOL DISTRICT COMMITMENTS AND RESPONSIBILITIES

Realizing that continuous improvement requires commitment, _____School District commits, with due diligence, to the following, in support of the program goals, objectives, performance measures, activities and program evaluation for successful implementation of *REIL-Extend:*

2.1 Implement and support the implementation of MCESA's commitments to the LEA as numerated in items 1.0 through 1.13 above.

2.2 Implement an LEA-wide Human Capital Management System that utilizes data from the performance-based evaluation system to inform educator workforce decision-making in the areas of recruitment, hiring/selection, placement, retention, dismissal, professional development, tenure, and promotion.

2.3 Identify a set of high-need schools to participate in the Opportunity Culture Initiative, including a planning/design period and selection of reach extension models that increase access to highly effective educators.

2.4 Adhere to the guiding principles for each core component of REIL-Extend.

2.5 Utilize a data management system (that meets established criteria) to support the LEA-wide human capital management system by managing the import and entry of data to the REILize Decision Support System (RDSS) ; managing the quality, fidelity, and timelines of data entered into RDSS.

2.6 Conduct necessary and appropriate observations using the appropriate Learning, Coaching, and/or Leading Observation Instruments (or a viable alternative that meets identified criteria specified in the grant application).

2.7 Collaborate on the development of observation instrument(s) to support implementation of reach extension models.

2.8 Adopt and implement a sustainable performance-based compensation system that rewards educator effectiveness, increases retention rates, pays educators more for extending their reach, and follows the principles of human resource alignment.

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2.9 Participate in the collaborative development and implementation of innovative strategies that build the capacity of teachers, principals, and school leaders to increase student academic progress, achievement, and success.

2.10 Effectively communicate the components of the program to teachers, school leaders, principals, district office administrators, other school personnel, and the community.

2.11 Ensure involvement and support of the vision, mission, goals, objectives, activities and program evaluation, where appropriate, from teachers, school leaders, principals, other certified personnel and community.

2.12 Utilize a system for monitoring inter-rater agreement and certification for all evaluators of teachers and principals.

2.13 Provide sufficient time for on-going, job-embedded professional learning opportunities for superintendent, central office staff, teachers, and principals.

2.14 Facilitates successful signing of data sharing and data steward agreements.

MUTUAL COMMITMENT:

Maricopa County Education Service Agency and the Cassa Vista School District mutually commit, with due diligence, to support each other to ensure the successful implementation and accomplishment of *REIL-Extend's* vision, mission, goals, objectives, and activities.

Signatures on Next Page

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MEMORANDUM OF UNDERSTANING (MOU) BETWEEN
_____ SCHOOL DISTRICT # 31 AND
MARICOPA COUNTY EDUCATION SERVICE AGENCY
ON BEHALF OF *REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP—EXTEND (REIL-Extend)* AND THE TEACHER INCENTIVE FUND (TIF) PROGRAM CFDA 84.374A

SIGNATURE PAGE

IN WITNESS WHEREOF, the parties hereto have executed the entire contents of this Memorandum of Understanding on the dates indicated below:

On Behalf of the Roosevelt **School District #** 66

[redacted]
[redacted], Superintendent

Date: 7/6/16

[redacted]
President Governing Board

Date: 7/5/15

[redacted]
Dr. Don Covey, Superintendent

Date: 7/14/16

[redacted]
Ms. Kristine Morris, Chief Deputy Supt.

Date:_____

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Memorandum of Understanding between

WILSON ELEMENTARY SCHOOL DISTRICT # 7 and

MARICOPA COUNTY EDUCATION SERVICE AGENCY

The Wilson School District # 7, an eligible LEA with high-need schools, Maricopa County Education Service Agency, the lead applicant, hereafter referred to as MCESA, and in conjunction with the United States Department of Education of the Teacher Incentive Fund (TIF) program CFDA: 84-374A, hereafter referred to as USDOE, affirm the commitments and responsibilities of Wilson School District and MCESA through this Memorandum of Understanding (MOU), beginning upon award of TIF grant through December 30, 2021, to ensure the implementation and accomplishment of the vision, mission, goals, objectives, and critical work activities for *Extend Excellence*, also referred to as *REIL(Rewarding Excellence in Instruction and Leadership)-Extend.*

OVERVIEW

The TIF program is based on the premise, supported by 20 years of research, that effective teachers are the most critical in-school factor in improving student outcomes, and principals are also key in-school factors for improving student outcomes. However, a teacher shortage is hitting Arizona hard, with recent statistics indicating that up to 62 percent of public schools were reporting unfilled teaching positions, according to an Arizona Department of Education survey. To make matters worse, 23 percent of Arizona educators will be eligible to retire in the next four years, according to the Arizona State Retirement System's October 2014 Fact Sheet. Now, more than ever, we must be selective. If we are going to be short-staffed, it is better to be staffed with the best and the brightest. Only those educators are equipped to make up the difference (Public Impact, 2009).

Given the importance of ensuring that educators are as effective as possible, especially for high-need students, the TIF program uses performance-based compensation and related supports for educators to *catalyze* improvements in a district's human capital management and in student outcomes. The evaluation systems that LEAs use to award performance-based compensation to teachers and principals also provide key information that LEAs can use to develop recruitment strategies for high-need schools, identify educators for advancement, and tailor professional development for teachers and principals in a manner that can promote a more effective workforce.

Implementation of REIL-Extend will pull together a partner alliance focused on promoting equitable access to effective teachers for students from low-income families and minority students across and within schools and districts and assist alliance LEAs in aligning their own strategies for equitable access to excellent educators with Arizona's state equity plan (Ensuring Equitable Access to Excellent Educators in Arizona).

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The Wilson School District, in collaboration with other alliance school district members and MCESA, shall mutually agree to the commitments and responsibilities that will accomplish LEA-wide implementation of *REIL-Extend.*

COLLABORATIVE ALLIANCE MEMBER VISION OF *REIL-Extend*

We believe all students can learn far more when they experience excellent instruction consistently. We also believe excellent leadership is a critical working condition for effective teachers. Therefore, over the next five years, REIL-Extend, guided by the clearly articulated Theory of Change, will advance the vision of extending the reach of excellent educators in high-need schools as a core initiative under LEA-wide Human Capital Management System implementation with an Educator Evaluation and Support System at the center. Implementation of REIL-Extend will support the alliance vision to remove students from the shackles of poverty and close achievement gaps that will enable all alliance school district member's students to realize a positive, productive, and economically secure life throughout their adult years.

PRIORITY GOALS:

1. Implement an LEA-wide human capital management system with an embedded educator evaluation and support systems at the center.
2. Implement an LEA-wide teacher and principal performance-based evaluation and support system with significant focus on establishing the common vision of instructional improvement, provision of qualified and certified evaluator training, implementation of procedures to establish and monitor inter-rater agreement, and increasing student academic progress and achievement.
3. Implement an LEA-wide strategic and sustainable performance- based compensation system for attracting, retaining, and sustaining effective educators in high needs schools.
4. Redesign schools to accelerate access to effective educators by extending the reach of excellent educators

As alliance partners, Wilson School District and MCESA will adopt the following commitments and responsibilities to ensure the accomplishment of the vision, mission, and goals for *REIL-Extend* in accordance with the United States Office of Education Teacher Incentive Fund CFDA 84.374A.

1.0 MCESA COMMITMENTS AND RESPONSIBILITIES

MCESA makes the following commitments and accepts the following responsibilities to the LEA to ensure the accomplishment of the vision, mission and goals of *REIL-Extend.*

1.1 Coordinate the implementation of the Opportunity Culture Initiative in identified high-need schools, resulting in implementation of reach extensions.

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1.2 Provide access to the REILize Decision Support System (RDSS), a resource for data management and reporting including observation and assessment data capture tools; rostering tools; professional development resources and tools, and human capital management decision making reports.

1.3 Facilitate the LEA's use of its' refined human capital management system to use data for: (1) implementing professional development programs aligned to the common vision of instructional improvement articulated through the REIL (or LEA) Learning and Leading Observation Instruments and the resulting educator goal plans; (2) equitable distribution of educators/equitable access to effective educators; informing recruitment, hiring, placement, retention, promotion and dismissal of educators.

1.4 Provide support for implementation of valid and reliable observation instruments for all educator groups.

1.5 Implement assessment system for use in overall effective rating for all educator groups.

1.6 Validate initial and continuous eligibility of high-need LEA schools.

1.7 Facilitate and implement new strategic and tactical plans of action for Human Capital Management Systems that will attract, retain, motivate, and financially sustain effective and highly effective educators in the LEA's highest needs schools through alignment of governing board policies, administrative regulations, and state statutes.

1.8 Facilitate the refinement/development of a sustainable performance-based compensation system that rewards educator effectiveness, increases retention rates, pays educators more for extending their reach, and follows the principles of human resource alignment.

1.9 Collaboratively develop and implement innovative strategies that build the capacity of teachers, principals, and school leaders to increase student academic progress, achievement, and success, enabling each student to successfully enter post-secondary education and/or demonstrate career-readiness.

1.10 Communicate the vision, mission, goals, objectives, performance measures, and critical work activities to appropriate stakeholders (e.g. teachers, school leaders, principals, district office administrators, support personnel, governing school board members, and the community) in alignment with the REIL stakeholder engagement & communication plan.

1.11 Facilitate the development of the LEA-level stakeholder engagement & communication plan in order to ensure ongoing strategic and tactical plans of action for comprehensive and effective communications.

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1.12 Provide human, technological, and fiscal resources aligned with the approved grant application to ensure that the LEA will accomplish the vision, mission, goals, objectives, critical work activities and evaluation of the program.

1.13 As lead applicant, retain sole responsibility for the management of grant funds and for ensuring the overall implementation of the REIL-TNG project.

2.0 WILSON SCHOOL DISTRICT COMMITMENTS AND RESPONSIBILITIES

Realizing that continuous improvement requires commitment, Wilson School District commits, with due diligence, to the following, in support of the program goals, objectives, performance measures, activities and program evaluation for successful implementation of *REIL-Extend:*

2.1 Implement and support the implementation of MCESA's commitments to the LEA as numerated in items 1.0 through 1.13 above.

2.2 Implement an LEA-wide Human Capital Management System that utilizes data from the performance-based evaluation system to inform educator workforce decision-making in the areas of recruitment, hiring/selection, placement, retention, dismissal, professional development, tenure, and promotion.

2.3 Identify a set of high-need schools to participate in the Opportunity Culture Initiative, including a planning/design period and selection of reach extension models that increase access to highly effective educators.

2.4 Adhere to the guiding principles for each core components of REIL-Extend.

2.5 Utilize a data management system to support the LEA-wide human capital management system by managing the import and entry of data to the REILize Decision Support System (RDSS); managing the quality, fidelity, and timelines of data entered into RDSS.

2.6 Conduct necessary and appropriate observations using the appropriate Learning, Coaching, and/or Leading Observation Instruments.

2.7 Collaborate on the development of observation instrument(s) to support implementation of reach extension models.

2.8 Adopt and implement a sustainable performance-based compensation system that rewards educator effectiveness, increases retention rates, pays educators more for extending their reach, and follows the principles of human resource alignment.

2.9 Participate in the collaborative development and implementation of innovative strategies that build the capacity of teachers, principals, and school leaders to increase student academic progress, achievement, and success.

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2.10 Effectively communicate the components of the program to teachers, school leaders, principals, district office administrators, other school personnel, and the community.

2.11 Ensure involvement and support of the vision, mission, goals, objectives, activities and program evaluation, where appropriate, from teachers, school leaders, principals, other certified personnel and community.

2.12 Utilize a system for monitoring inter-rater agreement and certification for all evaluators of teachers and principals.

2.13 Provide sufficient time for on-going, job-embedded professional learning opportunities for superintendent, central office staff, teachers, and principals.

2.14 Signs/extends appropriate data sharing and data steward agreements.

MUTUAL COMMITMENT:

Maricopa County Education Service Agency and the Wilson School District mutually commit, with due diligence, to support each other to ensure the successful implementation and accomplishment of *REIL-Extend's* vision, mission, goals, objectives, and activities.

Signatures on Next Page

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MARICOPA COUNTY EDUCATION SERVICE AGENCY ON BEHALF OF *REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP—EXTEND (REIL-Extend)* AND THE TEACHER INCENTIVE FUND (TIF) PROGRAM CFDA 84.374A

SIGNATURE PAGE

IN WITNESS WHEREOF, the parties hereto have executed the entire contents of this Memorandum of Understanding on the dates indicated below:

On Behalf of the Wilson School District # 7:

[redacted]

Date: 6/28/16

[redacted]

Date: 6/28/16

On Behalf of Maricopa County Service Agency (MCESA):

[redacted]

Dr. Don Covey, Superintendent

Date: 7/14/2016

[redacted]

Ms. Kristine Morris, Chief Deputy Supt.

Date:_____

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Memorandum of Understanding between

NADABURG UNIFIED SCHOOL DISTRICT #81 and

MARICOPA COUNTY EDUCATION SERVICE AGENCY

The Nadaburg Unified School District #81, an eligible LEA with high-need schools, Maricopa County Education Service Agency, the lead applicant, hereafter referred to as MCESA, and in conjunction with the United States Department of Education of the Teacher Incentive Fund (TIF) program CFDA: 84-374A, hereafter referred to as USDOE, affirm the commitments and responsibilities of Nadaburg Unified School District and MCESA through this Memorandum of Understanding (MOU), beginning upon award of TIF grant through December 30, 2021, to ensure the implementation and accomplishment of the vision, mission, goals, objectives, and critical work activities for *Extend Excellence*, also referred to as *REIL(Rewarding Excellence in Instruction and Leadership)-Extend.*

OVERVIEW

The TIF program is based on the premise, supported by 20 years of research, that effective teachers are the most critical in-school factor in improving student outcomes, and principals are also key in-school factors for improving student outcomes. However, a teacher shortage is hitting Arizona hard, with recent statistics indicating that up to 62 percent of public schools were reporting unfilled teaching positions, according to an Arizona Department of Education survey. To make matters worse, 23 percent of Arizona educators will be eligible to retire in the next four years, according to the Arizona State Retirement System's October 2014 Fact Sheet. Now, more than ever, we must be selective. If we are going to be short-staffed, it is better to be staffed with the best and the brightest. Only those educators are equipped to make up the difference (Public Impact, 2009).

Given the importance of ensuring that educators are as effective as possible, especially for high-need students, the TIF program uses performance-based compensation and related supports for educators to *catalyze* improvements in a district's human capital management and in student outcomes. The evaluation systems that LEAs use to award performance-based compensation to teachers and principals also provide key information that LEAs can use to develop recruitment strategies for high-need schools, identify educators for advancement, and tailor professional development for teachers and principals in a manner that can promote a more effective workforce.

Implementation of REIL-Extend will pull together a partner alliance focused on promoting equitable access to effective teachers for students from low-income families and minority students across and within schools and districts and assist alliance LEAs in aligning their own strategies for equitable access to excellent educators with Arizona's state equity plan (Ensuring Equitable Access to Excellent Educators in Arizona).

All rights reserved by MCESA.

The Nadaburg School District, in collaboration with other alliance school district members and MCESA, shall mutually agree to the commitments and responsibilities that will accomplish LEA-wide implementation of *REIL-Extend.*

COLLABORATIVE ALLIANCE MEMBER VISION OF *REIL-Extend*

We believe all students can learn far more when they experience excellent instruction consistently. We also believe excellent leadership is a critical working condition for effective teachers. Therefore, over the next five years, REIL-Extend, guided by the clearly articulated Theory of Change, will advance the vision of extending the reach of excellent educators in high-need schools as a core initiative under LEA-wide Human Capital Management System implementation with an Educator Evaluation and Support System at the center. Implementation of REIL-Extend will support the alliance vision to remove students from the shackles of poverty and close achievement gaps that will enable all alliance school district member's students to realize a positive, productive, and economically secure life throughout their adult years.

PRIORITY GOALS:

1. Implement an LEA-wide human capital management system with an embedded educator evaluation and support systems at the center.
2. Implement an LEA-wide teacher and principal performance-based evaluation and support system with significant focus on establishing the common vision of instructional improvement, provision of qualified and certified evaluator training, implementation of procedures to establish and monitor inter-rater agreement, and increasing student academic progress and achievement.
3. Implement an LEA-wide strategic and sustainable performance- based compensation system for attracting, retaining, and sustaining effective educators in high needs schools.
4. Redesign schools to accelerate access to effective educators by extending the reach of excellent educators

As alliance partners, Nadaburg Unified School District and MCESA will adopt the following commitments and responsibilities to ensure the accomplishment of the vision, mission, and goals for *REIL-Extend* in accordance with the United States Office of Education Teacher Incentive Fund CFDA 84.374A.

1.0 MCESA COMMITMENTS AND RESPONSIBILITIES

MCESA makes the following commitments and accepts the following responsibilities to the LEA to ensure the accomplishment of the vision, mission and goals of *REIL-Extend.*

1.1 Coordinate the implementation of the Opportunity Culture Initiative in identified high-need schools, resulting in implementation of reach extensions.

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1.2 Provide access to the REILize Decision Support System (RDSS), a resource for data management and reporting including observation and assessment data capture tools; rostering tools; professional development resources and tools, and human capital management decision making reports.

1.3 Facilitate the LEA's use of its' refined human capital management system to use data for: (1) implementing professional development programs aligned to the common vision of instructional improvement articulated through the REIL (or LEA) Learning and Leading Observation Instruments and the resulting educator goal plans; (2) equitable distribution of educators/equitable access to effective educators; informing recruitment, hiring, placement, retention, promotion and dismissal of educators.

1.4 Provide support for implementation of valid and reliable observation instruments for all educator groups.

1.5 Implement assessment system for use in overall effective rating for all educator groups.

1.6 Validate initial and continuous eligibility of high-need LEA schools.

1.7 Facilitate and implement new strategic and tactical plans of action for Human Capital Management Systems that will attract, retain, motivate, and financially sustain effective and highly effective educators in the LEA's highest needs schools through alignment of governing board policies, administrative regulations, and state statutes.

1.8 Facilitate the refinement/development of a sustainable performance-based compensation system that rewards educator effectiveness, increases retention rates, pays educators more for extending their reach, and follows the principles of human resource alignment.

1.9 Collaboratively develop and implement innovative strategies that build the capacity of teachers, principals, and school leaders to increase student academic progress, achievement, and success, enabling each student to successfully enter post-secondary education and/or demonstrate career-readiness.

1.10 Communicate the vision, mission, goals, objectives, performance measures, and critical work activities to appropriate stakeholders (e.g. teachers, school leaders, principals, district office administrators, support personnel, governing school board members, and the community) in alignment with the REIL stakeholder engagement & communication plan.

1.11 Facilitate the development of the LEA-level stakeholder engagement & communication plan in order to ensure ongoing strategic and tactical plans of action for comprehensive and effective communications.

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1.12 Provide human, technological, and fiscal resources aligned with the approved grant application to ensure that the LEA will accomplish the vision, mission, goals, objectives, critical work activities and evaluation of the program.

1.13 As lead applicant, retain sole responsibility for the management of grant funds and for ensuring the overall implementation of the REIL-TNG project.

2.0 SCHOOL DISTRICT COMMITMENTS AND RESPONSIBILITIES

Realizing that continuous improvement requires commitment, Nadaburg Unified School District commits, with due diligence, to the following, in support of the program goals, objectives, performance measures, activities and program evaluation for successful implementation of *REIL-Extend:*

2.1 Implement and support the implementation of MCESA's commitments to the LEA as numerated in items 1.0 through 1.13 above.

2.2 Implement an LEA-wide Human Capital Management System that utilizes data from the performance-based evaluation system to inform educator workforce decision-making in the areas of recruitment, hiring/selection, placement, retention, dismissal, professional development, tenure, and promotion.

2.3 Identify a set of high-need schools to participate in the Opportunity Culture Initiative, including a planning/design period and selection of reach extension models that increase access to highly effective educators.

2.4 Adhere to the guiding principles for each core components of REIL-Extend.

2.5 Utilize a data management system to support the LEA-wide human capital management system by managing the import and entry of data to the REILize Decision Support System (RDSS); managing the quality, fidelity, and timelines of data entered into RDSS.

2.6 Conduct necessary and appropriate observations using the appropriate Learning, Coaching, and/or Leading Observation Instruments.

2.7 Collaborate on the development of observation instrument(s) to support implementation of reach extension models.

2.8 Adopt and implement a sustainable performance-based compensation system that rewards educator effectiveness, increases retention rates, pays educators more for extending their reach, and follows the principles of human resource alignment.

2.9 Participate in the collaborative development and implementation of innovative strategies that build the capacity of teachers, principals, and school leaders to increase student academic progress, achievement, and success.

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2.10 Effectively communicate the components of the program to teachers, school leaders, principals, district office administrators, other school personnel, and the community.

2.11 Ensure involvement and support of the vision, mission, goals, objectives, activities and program evaluation, where appropriate, from teachers, school leaders, principals, other certified personnel and community.

2.12 Utilize a system for monitoring inter-rater agreement and certification for all evaluators of teachers and principals.

2.13 Provide sufficient time for on-going, job-embedded professional learning opportunities for superintendent, central office staff, teachers, and principals.

2.14 Signs/extends appropriate data sharing and data steward agreements.

MUTUAL COMMITMENT:

Maricopa County Education Service Agency and the Nadaburg Unified School District mutually commit, with due diligence, to support each other to ensure the successful implementation and accomplishment of *REIL-Extend's* vision, mission, goals, objectives, and activities.

Signatures on Next Page

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MEMORANDUM OF UNDERSTANING (MOU) BETWEEN NADABURG UNIFIED SCHOOL DISTRICT # 81 AND MARICOPA COUNTY EDUCATION SERVICE AGENCY ON BEHALF OF *REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP—EXTEND (REIL-Extend)* AND THE TEACHER INCENTIVE FUND (TIF) PROGRAM CFDA 84.374A

SIGNATURE PAGE

IN WITNESS WHEREOF, the parties hereto have executed the entire contents of this Memorandum of Understanding on the dates indicated below:

On Behalf of the Nadaburg Unified School District # 81:

[redacted]

Superintendent

Date: 7/13/16

[redacted]

President Governing Board

Date: 7/13/16

On Behalf of Maricopa County Service Agency (MCESA):

[redacted]

Dr. Don Covey, Superintendent

Date: 7/14/16

[redacted]

Ms. Kristine Morris, Chief Deputy Supt.

Date:_____

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Memorandum of Understanding between

INCITO SCHOOLS and

MARICOPA COUNTY EDUCATION SERVICE AGENCY

Incito Schools, an eligible LEA with high-need schools, Maricopa County Education Service Agency, the lead applicant, hereafter referred to as MCESA, and in conjunction with the United States Department of Education of the Teacher Incentive Fund (TIF) program CFDA: 84-374A, hereafter referred to as USDOE, affirm the commitments and responsibilities of Incito Schools and MCESA through this Memorandum of Understanding (MOU), beginning upon award of TIF grant through December 30, 2021, to ensure the implementation and accomplishment of the vision, mission, goals, objectives, and critical work activities for *Extend Excellence,* also referred to as *REIL(Rewarding Excellence in Instruction and Leadership)-Extend.*

OVERVIEW

The TIF program is based on the premise, supported by 20 years of research, that effective teachers are the most critical in-school factor in improving student outcomes, and principals are also key in-school factors for improving student outcomes. However, a teacher shortage is hitting Arizona hard, with recent statistics indicating that up to 62 percent of public schools were reporting unfilled teaching positions, according to an Arizona Department of Education survey. To make matters worse, 23 percent of Arizona educators will be eligible to retire in the next four years, according to the Arizona State Retirement System's October 2014 Fact Sheet. Now, more than ever, we must be selective. If we are going to be short-staffed, it is better to be staffed with the best and the brightest. Only those educators are equipped to make up the difference (Public Impact, 2009).

Given the importance of ensuring that educators are as effective as possible, especially for high-need students, the TIF program uses performance-based compensation and related supports for educators to *catalyze* improvements in a district's human capital management and in student outcomes. The evaluation systems that LEAs use to award performance-based compensation to teachers and principals also provide key information that LEAs can use to develop recruitment strategies for high-need schools, identify educators for advancement, and tailor professional development for teachers and principals in a manner that can promote a more effective workforce.

Implementation of REIL-Extend will pull together a partner alliance focused on promoting equitable access to effective teachers for students from low-income families and minority students across and within schools and districts and assist alliance LEAs in aligning their own strategies for equitable access to excellent educators with Arizona's state equity plan (Ensuring Equitable Access to Excellent Educators in Arizona).

All rights reserved by MCESA.

Incito Schools, in collaboration with other alliance school district members and MCESA, shall mutually agree to the commitments and responsibilities that will accomplish LEA-wide implementation of *REIL-Extend.*

COLLABORATIVE ALLIANCE MEMBER VISION OF *REIL-Extend*

We believe all students can learn far more when they experience excellent instruction consistently. We also believe excellent leadership is a critical working condition for effective teachers. Therefore, over the next five years, REIL-Extend, guided by the clearly articulated Theory of Change, will advance the vision of extending the reach of excellent educators in high-need schools as a core initiative under LEA-wide Human Capital Management System implementation with an Educator Evaluation and Support System at the center. Implementation of REIL-Extend will support the alliance vision to remove students from the shackles of poverty and close achievement gaps that will enable all alliance school district member's students to realize a positive, productive, and economically secure life throughout their adult years.

PRIORITY GOALS:

1. Implement an LEA-wide human capital management system with an embedded educator evaluation and support systems at the center.
2. Implement an LEA-wide teacher and principal performance-based evaluation and support system with significant focus on establishing the common vision of instructional improvement, provision of qualified and certified evaluator training, implementation of procedures to establish and monitor inter-rater agreement, and increasing student academic progress and achievement.
3. Implement an LEA-wide strategic and sustainable performance- based compensation system for attracting, retaining, and sustaining effective educators in high needs schools.
4. Redesign schools to accelerate access to effective educators by extending the reach of excellent educators

As alliance partners, Incito Schools and MCESA will adopt the following commitments and responsibilities to ensure the accomplishment of the vision, mission, and goals for *REIL-Extend* in accordance with the United States Office of Education Teacher Incentive Fund CFDA 84.374A.

1.0 MCESA COMMITMENTS AND RESPONSIBILITIES

MCESA makes the following commitments and accepts the following responsibilities to the LEA to ensure the accomplishment of the vision, mission and goals of *REIL-Extend.*

1.1 Coordinate the implementation of the Opportunity Culture Initiative in identified high-need schools, resulting in implementation of reach extensions.

All rights reserved by MCESA.

1.2 Provide access to the REILize Decision Support System (RDSS), a resource for data management and reporting including observation and assessment data capture tools; rostering tools; professional development resources and tools, and human capital management decision making reports.

1.3 Facilitate the LEA's use of its' refined human capital management system to use data for: (1) implementing professional development programs aligned to the common vision of instructional improvement articulated through the REIL (or LEA) Learning and Leading Observation Instruments and the resulting educator goal plans; (2) equitable distribution of educators/equitable access to effective educators; informing recruitment, hiring, placement, retention, promotion and dismissal of educators.

1.4 Provide support for implementation of valid and reliable observation instruments for all educator groups.

1.5 Implement assessment system for use in overall effective rating for all educator groups.

1.6 Validate initial and continuous eligibility of high-need LEA schools.

1.7 Facilitate and implement new strategic and tactical plans of action for Human Capital Management Systems that will attract, retain, motivate, and financially sustain effective and highly effective educators in the LEA's highest needs schools through alignment of governing board policies, administrative regulations, and state statutes.

1.8 Facilitate the refinement/development of a sustainable performance-based compensation system that rewards educator effectiveness, increases retention rates, pays educators more for extending their reach, and follows the principles of human resource alignment.

1.9 Collaboratively develop and implement innovative strategies that build the capacity of teachers, principals, and school leaders to increase student academic progress, achievement, and success, enabling each student to successfully enter post-secondary education and/or demonstrate career-readiness.

1.10 Communicate the vision, mission, goals, objectives, performance measures, and critical work activities to appropriate stakeholders (e.g. teachers, school leaders, principals, district office administrators, support personnel, governing school board members, and the community) in alignment with the REIL stakeholder engagement & communication plan.

1.11 Facilitate the development of the LEA-level stakeholder engagement & communication plan in order to ensure ongoing strategic and tactical plans of action for comprehensive and effective communications.

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1.12 Provide human, technological, and fiscal resources aligned with the approved grant application to ensure that the LEA will accomplish the vision, mission, goals, objectives, critical work activities and evaluation of the program.

1.13 As lead applicant, retain sole responsibility for the management of grant funds and for ensuring the overall implementation of the REIL-TNG project.

2.0 SCHOOL DISTRICT COMMITMENTS AND RESPONSIBILITIES

Realizing that continuous improvement requires commitment, Incito Schools commits, with due diligence, to the following, in support of the program goals, objectives, performance measures, activities and program evaluation for successful implementation of *REIL-Extend:*

2.1 Implement and support the implementation of MCESA's commitments to the LEA as numerated in items 1.0 through 1.13 above.

2.2 Implement an LEA-wide Human Capital Management System that utilizes data from the performance-based evaluation system to inform educator workforce decision-making in the areas of recruitment, hiring/selection, placement, retention, dismissal, professional development, tenure, and promotion.

2.3 Identify a set of high-need schools to participate in the Opportunity Culture Initiative, including a planning/design period and selection of reach extension models that increase access to highly effective educators.

2.4 Adhere to the guiding principles for each core components of REIL-Extend.

2.5 Utilize a data management system to support the LEA-wide human capital management system by managing the import and entry of data to the REILize Decision Support System (RDSS); managing the quality, fidelity, and timelines of data entered into RDSS.

2.6 Conduct necessary and appropriate observations using the appropriate Learning, Coaching, and/or Leading Observation Instruments.

2.7 Collaborate on the development of observation instrument(s) to support implementation of reach extension models.

2.8 Adopt and implement a sustainable performance-based compensation system that rewards educator effectiveness, increases retention rates, pays educators more for extending their reach, and follows the principles of human resource alignment.

2.9 Participate in the collaborative development and implementation of innovative strategies that build the capacity of teachers, principals, and school leaders to increase student academic progress, achievement, and success.

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2.10 Effectively communicate the components of the program to teachers, school leaders, principals, district office administrators, other school personnel, and the community.

2.11 Ensure involvement and support of the vision, mission, goals, objectives, activities and program evaluation, where appropriate, from teachers, school leaders, principals, other certified personnel and community.

2.12 Utilize a system for monitoring inter-rater agreement and certification for all evaluators of teachers and principals.

2.13 Provide sufficient time for on-going, job-embedded professional learning opportunities for superintendent, central office staff, teachers, and principals.

2.14 Signs/extends appropriate data sharing and data steward agreements.

MUTUAL COMMITMENT:

Maricopa County Education Service Agency and Incito Schools mutually commit, with due diligence, to support each other to ensure the successful implementation and accomplishment of *REIL-Extend's* vision, mission, goals, objectives, and activities.

Signatures on Next Page

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MEMORANDUM OF UNDERSTANING (MOU) BETWEEN
INCITO SCHOOLS AND
MARICOPA COUNTY EDUCATION SERVICE AGENCY
ON BEHALF OF *REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP—EXTEND (REIL-Extend)* AND THE TEACHER INCENTIVE FUND (TIF) PROGRAM CFDA 84.374A

SIGNATURE PAGE

IN WITNESS WHEREOF, the parties hereto have executed the entire contents of this Memorandum of Understanding on the dates indicated below:

On Behalf of the Incito Schools # 81:

[redacted]

Date: 7/13/16

[redacted]

President Governing Board

Date: 7/13/16

On Behalf of Maricopa County Service Agency (MCESA):

[redacted]

Dr. Don Covey, Superintendent

Date: 7/14/16

[redacted]

Ms. Kristine Morris, Chief Deputy Supt.

Date:_____

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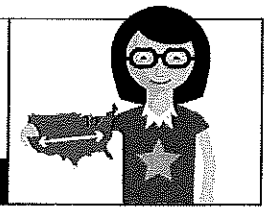
EXTENDING THE REACH OF EXCELLENT TEACHERS

HOW EVERY U.S. STUDENT CAN HAVE GREAT TEACHERS, EVERY YEAR.



MEMORANDUM OF UNDERSTANDING

Maricopa County Education Service Agency, the lead applicant, hereafter referred to as MCESA, Public Impact, an eligible partner that is operated primarily for educational interest, not organized primarily for profit, and which uses net proceeds to maintain, improve and expand operations of the organization, hereafter referred to as PI, affirm the commitments and responsibilities of MCESA and PI through this memorandum of understanding (MOU), beginning upon award of a Teacher Incentive Fund grant from the US Department of Education through December 30, 2021, to ensure the implementation and accomplishment of the vision, mission, goals, objectives, and critical Opportunity Culture work activities related to *Extend Excellence*, also referred to as *REIL (Rewarding Excellence in Instructional Leadership)-Extend.*

BACKGROUND: WHY EVERY CHILD NEEDS AN EXCELLENT TEACHER

Research continues to confirm that without consistent access to excellent teachers, most students who start behind stay behind, and too few middling and advanced students leap ahead. Even solid teachers who achieve one year of learning progress leave achievement gaps intact. Schools that consistently provide all students with excellent teachers—those in the top 25 percent who achieve well over one year of learning progress—can close those gaps. To ensure that every student has access to an excellent teacher every year, districts must enable excellent teachers to "extend their reach." To ensure that every school is led by an excellent principal every year, districts that struggle to attract and retain strong school leaders should also enable excellent principals to "extend their reach." Extending reach creates what PI calls "an Opportunity Culture."

Opportunity Culture (OC) uses job redesign and technology to free excellent teachers' time to reach more students and lead and develop their peer teachers toward excellence, and to allow excellent principals to reach more schools. OC also creates new roles for other teachers and school leaders to develop through collaboration with and leadership by the best, while contributing to excellent student learning. Reach job models allow much higher pay, sustainably and within budget, rather than by funding pay supplements with temporary grants. Most models create teaching teams and enable school-hour time for collaboration and professional development on the job.

Combined with better recruiting, retention, and dismissal when warranted, OC models could put excellent teachers in charge of every student's learning, excellent principals in charge of every school, while increasing the number of educators performing at this level.

Implementation of REIL-Extend will pull together a partner alliance focused on promoting equitable access to excellent teachers for students from low-income families and minority students across and within schools and districts and assist alliance LEAs in aligning their own strategies for equitable access to excellent educators with Arizona's state equity plan (Ensuring Equitable Access to Excellent Educators in Arizona).
Public Impact, in collaboration with alliance school district members and MCESA, shall mutually agree to the commitments and responsibilities that will accomplish implementation of *REIL-Extend.*

COLLABORATIVE ALLIANCE MEMBER VISION OF *REIL-Extend*

We believe all students can learn far more when they experience excellent instruction consistently. We also believe excellent leadership is a critical working condition for effective teachers. Therefore, over the next five years, REIL-Extend, guided by the clearly articulated Theory of Change, will advance the vision of extending the reach of excellent educators in high-need schools as a core initiative under LEA-wide Human Capital Management System implementation with an Educator Evaluation and Support System at the center. Implementation of REIL-Extend will support the alliance vision to remove students from the shackles of poverty and close achievement gaps that will enable all alliance school district member's students to realize a positive, productive, and economically secure life throughout their adult years.

PRIORITY GOALS:

1. Implement strategic and sustainable compensation system for attracting, retaining, and sustaining excellent educators in high needs schools.

2. Redesign schools to accelerate access to effective educators by extending the reach of excellent educators.

As alliance partners, PI and MCESA will adopt the following commitments and responsibilities to ensure the accomplishment of the vision, mission, and goals for *REIL-Extend* in accordance with the United States Office of Education Teacher Incentive Fund CFDA 84.374A.

PUBLIC IMPACT (PI) COMMITMENTS

PI makes the following commitments and accepts the following responsibilities to MCESA to ensure the accomplishment of the vision, mission and goals of *REIL-Extend.*

1.1 PI will work with MCESA to develop the overall plan for this work, including more detailed goals, roles, steps, and stakeholder analysis.

1.2 PI will provide design and technical expertise to help design teams carry out their work.

1.3 PI will build MCESA's capacity to lead the work independently before the end of the TIF grant.

1.4 PI will also maintain focus on the initiative's principles and the ultimate goal of reaching all students with excellent teaching.

1.5 PI engage in ongoing communication with MCESA throughout this project to monitor the project's progress and to share lessons being learned in other sites.

1.6 PI will include documentation of MCESA's work, lessons learned, and results for sharing nationally.

MARICOPA COUNTY EDUCATION SERVICE AGENCY (MCESA) COMMITMENTS

MCESA makes the following commitments and accepts the following responsibilities to PI to ensure the accomplishment of the vision, mission and goals of *REIL-Extend.*

1.1 Coordinate the implementation of the Opportunity Culture Initiative in identified high-need schools, resulting in implementation of reach extensions.

1.2 Communicate the vision, mission, goals, objectives, performance measures, and critical work activities to appropriate stakeholders (e.g. teachers, school leaders, principals, district office administrators, support personnel, governing school board members, and the community) in alignment with the REIL stakeholder engagement & communication plan.

1.3 Facilitate the development of the LEA-level stakeholder engagement & communication plan in order to ensure ongoing strategic and tactical plans of action for comprehensive and effective communications.

1.4 Provide human, technological, and fiscal resources aligned with the approved grant application to ensure that the LEA will accomplish the vision, mission, goals, objectives, critical work activities and evaluation of the program.

1.5 As lead applicant, retain sole responsibility for the management of grant funds and for ensuring the overall implementation of the REIL-TNG project.

1.6 MCESA may begin with targeted schools from LEA alliance members but intends to scale beyond the life of the TIF grant.

1.7 MCESA, will rigorously aim to fulfill the five Opportunity Culture Principles, in which *teams of teachers and school and district leaders must choose and tailor models to:*

* Reach more students with excellent principals, teachers and their teams
* Pay teachers and principals more for extending their reach
* Fund pay within regular budgets
* Provide protected in-school time and clarity about how to use it for planning, collaboration, and development – within and across schools as applicable
* Match authority and accountability to each person's responsibilities

1.8 MCESA, will assign a point person—a organization leader—fully accountable for implementing the reach extension initiative, with an expectation that the leader will have sufficient time and authority to oversee the work, ensuring fidelity with the Opportunity Culture principles.

1.9 MCESA will work with LEA alliance members to form a *district* design team ideally comprised of principals, district staff, and/or consultants to make district-level design decisions and oversee implementation of school-level models for reach. This design team will ensure that school-level design teams, which must include teachers, have clear parameters for school-level decisions and are given some autonomy to make implementation decisions. Design choices that schools are empowered to make may vary, and may include model selection, model details, and/or implementation process decisions (see Attachment B for autonomies that are helpful for establishing an Opportunity Culture in schools).

1.10 MCESA will ensure that LEA alliance members and their participating schools have committed to the five Opportunity Culture Principles in writing.

1.11 MCESA will collect and share with Public Impact data about: applicants for extended-reach roles; recruitment, selection and placement of teachers into extended-reach roles; the students for whom teachers in reach roles are accountable; student growth results for students reached by teachers in extended-reach roles by grade and subject, average salary and stipend amounts, subsequent reach

teacher turnover data; and data about district-wide teacher turnover rates and hiring selectivity. Additionally, as part of REIL-Extend program evaluation MCESA will assist in collecting teacher and staff perceptions about the OC implementation. Public Impact will provide tools to enable sharing of this data by the LEA alliance members and will abide by all confidentiality rules and laws affecting each member and work to align data reporting with RDSS dashboards.

MUTUAL COMMITMENT:

Maricopa County Education Service Agency and Public Impact mutually commit, with due diligence, to support each other to ensure the successful implementation and accomplishment of *REIL-Extend's* vision, mission, goals, objectives, and activities.

MEMORANDUM OF UNDERSTANING (MOU) BETWEEN
PUBLIC IMPACT AND
MARICOPA COUNTY EDUCATION SERVICE AGENCY
ON BEHALF OF *REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP—EXTEND (REIL-Extend)* AND THE TEACHER INCENTIVE FUND (TIF) PROGRAM CFDA 84.374A

IN WITNESS WHEREOF, the parties hereto have executed the entire contents of this Memorandum of Understanding on the dates indicated below:

On Behalf of Public Impact:

[redacted]

Bryan Hassel, Co-Director
Date: July 12, 2016

On [redacted] **cy (MCESA):**

[redacted]

Dr. Don Covey, Superintendent
Date: 7/13/2016

[redacted]

Ms. Kristine Morris, Chief Deputy Supt.
Date: 7/13/2016

ATTACHMENT B – SUGGESTED AUTONOMIES

The following autonomies can be helpful to LEA alliance members in building an Opportunity Culture and implementing their school models and designs. We hope that MCESA will look for opportunities to work with LEA alliance members to provide these flexibilities and autonomies, to the extent possible.

People:

* **Selection of Participating Schools, Principals and Assistant Principals**: Principals and assistant principals, and their schools, will be invited to participate based on their grasp of and commitment to the five Opportunity Culture Principles and to achieving outstanding learning for all students.

* **Reductions in Force and Local Displacement Processes:** Excellent teachers will be protected from layoffs and local displacement processes, regardless of seniority, to the extent possible. Additionally, efforts will be made to limit the number of teachers that are displaced from other schools into participating schools.

Program:

* **General**: MCESA will establish the expectation that LEA alliance members' redesigns will meet the five Opportunity Culture principles and take action as needed to ensure that redesigns meet these expectations.

* **Professional Development and Design sessions:** MCESA will require LEA alliance member to attend and participate in the mandatory design sessions and professional development for reach-extended roles.

Funds:

* MCESA will work with the LEA alliance members to support the use of Title I, S.I.G., TIF and other local, state, and federal funding sources to support school Opportunity Culture plan. MCESA will work with LEA alliance members and participating schools to gain flexibility from district requirements or pursue state budgetary waivers that will allow schools to:
    - shift funding across budget line items (including existing per-pupil funds as well as new and/or external funds);
    - change compensation structures, as described below; and
    - pay staff for additional time.

* **Compensation Plan**: MCESA will support LEA alliance members and participating schools in seeking necessary state and/or local waivers and in the design of a compensation plan that rewards teachers and staff for their contribution to reaching more student with excellent teachers, teaching teams, and learning outcomes, and that aligns with the school's goals and reach model. MCESA will set the expectation that participating schools design and implement reward strategies as financial incentives, increased opportunities for paid promotion and career advancement, and more flexible work hours that are designed to recruit, place, and retain staff with the skills necessary to meet the needs of students. MCESA will work with LEA alliance members to ensure that participating schools are able to:
    - pay excellent teachers more for being accountable for more students' learning and for success with additional students;
    - pay excellent school leaders more for being accountable for more student's learning and for success with additional students and staff;
    - create new roles outside of current salary structure and tenure rules; and

- assign existing staff to new roles, even if pay remains unchanged.

Accountability and Assessment of Success:

* **Evaluation Criteria:** MCESA, Public Impact and the LEA alliance members agree to mutually develop metrics and methods, which shall measure the success of the initiative. A combination of measures will be used to evaluate progress and success, including leading indicators (e.g., student attendance, discipline), lagging indicators (e.g., proficiency rates, graduation rate, student learning growth, promotion rates), and surveys of students, staff, and community.

* **Implementation Support and Remedies:** If progress toward meeting goals is not demonstrated, MCESA, Public Impact and the LEA alliance member shall meet in person to determine what additional changes and supports are needed to ensure that all programmatic elements are properly in place by the beginning of the following school year or sooner.

Memorandum of Understanding between

KINGMAN UNIFIED SCHOOL DISTRICT and

MARICOPA COUNTY EDUCATION SERVICE AGENCY

The Kingman Unified School District, an eligible LEA with high-need schools, Maricopa County Education Service Agency, the lead applicant, hereafter referred to as MCESA, and in conjunction with the United States Department of Education of the Teacher Incentive Fund (TIF) program CFDA: 84-374A, hereafter referred to as USDOE, affirm the commitments and responsibilities of Kingman Unified School District and MCESA through this Memorandum of Understanding (MOU), beginning upon award of TIF grant through December 30, 2021, to ensure the implementation and accomplishment of the vision, mission, goals, objectives, and critical work activities for *Extend Excellence*, also referred to as *REIL(Rewarding Excellence in Instruction and Leadership)-Extend.*

OVERVIEW

The TIF program is based on the premise, supported by 20 years of research, that effective teachers are the most critical in-school factor in improving student outcomes, and principals are also key in-school factors for improving student outcomes. However, a teacher shortage is hitting Arizona hard, with recent statistics indicating that up to 62 percent of public schools were reporting unfilled teaching positions, according to an Arizona Department of Education survey. To make matters worse, 23 percent of Arizona educators will be eligible to retire in the next four years, according to the Arizona State Retirement System‘s October 2014 Fact Sheet. Now, more than ever, we must be selective. If we are going to be short-staffed, it is better to be staffed with the best and the brightest. Only those educators are equipped to make up the difference (Public Impact, 2009).

Given the importance of ensuring that educators are as effective as possible, especially for high-need students, the TIF program uses performance-based compensation and related supports for educators to *catalyze* improvements in a district’s human capital management and in student outcomes. The evaluation systems that LEAs use to award performance-based compensation to teachers and principals also provide key information that LEAs can use to develop recruitment strategies for high-need schools, identify educators for advancement, and tailor professional development for teachers and principals in a manner that can promote a more effective workforce.

Implementation of REIL-Extend will pull together a partner alliance focused on promoting equitable access to effective teachers for students from low-income families and minority students across and within schools and districts and assist alliance LEAs in aligning their own strategies for equitable access to excellent educators with Arizona’s state equity plan (Ensuring Equitable Access to Excellent Educators in Arizona).

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The Kingman Unified School District, in collaboration with other alliance school district members and MCESA, shall mutually agree to the commitments and responsibilities that will accomplish LEA-wide implementation of *REIL-Extend*.

COLLABORATIVE ALLIANCE MEMBER VISION OF *REIL-Extend*

We believe all students can learn far more when they experience excellent instruction consistently. We also believe excellent leadership is a critical working condition for effective teachers. Therefore, over the next five years, REIL-Extend, guided by the clearly articulated Theory of Change, will advance the vision of extending the reach of excellent educators in high-need schools as a core initiative under LEA-wide Human Capital Management System implementation with an Educator Evaluation and Support System at the center. Implementation of REIL-Extend will support the alliance vision to remove students from the shackles of poverty and close achievement gaps that will enable all alliance school district member's students to realize a positive, productive, and economically secure life throughout their adult years.

PRIORITY GOALS:

1. Implement an LEA-wide human capital management system with an embedded educator evaluation and support systems at the center.
2. Implement an LEA-wide teacher and principal performance-based evaluation and support system with significant focus on establishing the common vision of instructional improvement, provision of qualified and certified evaluator training, implementation of procedures to establish and monitor inter-rater agreement, and increasing student academic progress and achievement.
3. Implement an LEA-wide strategic and sustainable performance- based compensation system for attracting, retaining, and sustaining effective educators in high needs schools.
4. Redesign schools to accelerate access to effective educators by extending the reach of excellent educators

As alliance partners, Kingman Unified School District and MCESA will adopt the following commitments and responsibilities to ensure the accomplishment of the vision, mission, and goals for *REIL-Extend* in accordance with the United States Office of Education Teacher Incentive Fund CFDA 84.374A.

1.0 MCESA COMMITMENTS AND RESPONSIBILITIES

MCESA makes the following commitments and accepts the following responsibilities to the LEA to ensure the accomplishment of the vision, mission and goals of *REIL-Extend.*

1.1 Coordinate the implementation of the Opportunity Culture Initiative in identified high-need schools, resulting in implementation of reach extensions.

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1.2 Provide access to the REILize Decision Support System (RDSS), a resource for data management and reporting including observation and assessment data capture tools; rostering tools; professional development resources and tools, and human capital management decision making reports.

1.3 Facilitate the LEA's use of its' refined human capital management system to use data for: (1) implementing professional development programs aligned to the common vision of instructional improvement articulated through the REIL (or LEA) Learning and Leading Observation Instruments and the resulting educator goal plans; (2) equitable distribution of educators/equitable access to effective educators; informing recruitment, hiring, placement, retention, promotion and dismissal of educators.

1.4 Provide support for implementation of valid and reliable observation instruments for all educator groups.

1.5 Implement assessment system for use in overall effective rating for all educator groups.

1.6 Validate initial and continuous eligibility of high-need LEA schools.

1.7 Facilitate and implement new strategic and tactical plans of action for Human Capital Management Systems that will attract, retain, motivate, and financially sustain effective and highly effective educators in the LEA's highest needs schools through alignment of governing board policies, administrative regulations, and state statutes.

1.8 Facilitate the refinement/development of a sustainable performance-based compensation system that rewards educator effectiveness, increases retention rates, pays educators more for extending their reach, and follows the principles of human resource alignment.

1.9 Collaboratively develop and implement innovative strategies that build the capacity of teachers, principals, and school leaders to increase student academic progress, achievement, and success, enabling each student to successfully enter post-secondary education and/or demonstrate career-readiness.

1.10 Communicate the vision, mission, goals, objectives, performance measures, and critical work activities to appropriate stakeholders (e.g. teachers, school leaders, principals, district office administrators, support personnel, governing school board members, and the community) in alignment with the REIL stakeholder engagement & communication plan.

1.11 Facilitate the development of the LEA-level stakeholder engagement & communication plan in order to ensure ongoing strategic and tactical plans of action for comprehensive and effective communications.

1.12 Provide human, technological, and fiscal resources aligned with the approved grant application to ensure that the LEA will accomplish the vision, mission, goals, objectives, critical work activities and evaluation of the program.

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1.13 As lead applicant, retain sole responsibility for the management of grant funds and for ensuring the overall implementation of the REIL-TNG project.

2.0 KINGMAN UNFIED SCHOOL DISTRICT COMMITMENTS AND RESPONSIBILITIES

Realizing that continuous improvement requires commitment, Kingman Unified School District commits, with due diligence, to the following, in support of the program goals, objectives, performance measures, activities and program evaluation for successful implementation of *REIL-Extend:*

2.1 Implement and support the implementation of MCESA's commitments to the LEA as numerated in items 1.0 through 1.13 above.

2.2 Implement an LEA-wide Human Capital Management System that utilizes data from the performance-based evaluation system to inform educator workforce decision-making in the areas of recruitment, hiring/selection, placement, retention, dismissal, professional development, tenure, and promotion.

2.3 Identify a set of high-need schools to participate in the Opportunity Culture Initiative, including a planning/design period and selection of reach extension models that increase access to highly effective educators.

2.4 Adhere to the guiding principles for each core components of REIL-Extend.

2.5 Utilize a data management system to support the LEA-wide human capital management system by managing the import and entry of data to the REILize Decision Support System (RDSS); managing the quality, fidelity, and timelines of data entered into RDSS.

2.6 Conduct necessary and appropriate observations using the appropriate Learning, Coaching, and/or Leading Observation Instruments.

2.7 Collaborate on the development of observation instrument(s) to support implementation of reach extension models.

2.8 Adopt and implement a sustainable performance-based compensation system that rewards educator effectiveness, increases retention rates, pays educators more for extending their reach, and follows the principles of human resource alignment.

2.9 Participate in the collaborative development and implementation of innovative strategies that build the capacity of teachers, principals, and school leaders to increase student academic progress, achievement, and success.

2.10 Effectively communicate the components of the program to teachers, school leaders, principals, district office administrators, other school personnel, and the community.

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2.11 Ensure involvement and support of the vision, mission, goals, objectives, activities and program evaluation, where appropriate, from teachers, school leaders, principals, other certified personnel and community.

2.12 Utilize a system for monitoring inter-rater agreement and certification for all evaluators of teachers and principals.

2.13 Provide sufficient time for on-going, job-embedded professional learning opportunities for superintendent, central office staff, teachers, and principals.

2.14 Signs/extends appropriate data sharing and data steward agreements.

MUTUAL COMMITMENT:

Maricopa County Education Service Agency and the Kingman Unified School District mutually commit, with due diligence, to support each other to ensure the successful implementation and accomplishment of *REIL-Extend's* vision, mission, goals, objectives, and activities.

Signatures on Next Page

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MEMORANDUM OF UNDERSTANDING (MOU) BETWEEN KINGMAN UNIFIED SCHOOL DISTRICT # 31 AND MARICOPA COUNTY EDUCATION SERVICE AGENCY ON BEHALF OF *REWARDING EXCELLENCE IN INSTRUCTION AND LEADERSHIP—EXTEND (REIL-Extend)* AND THE TEACHER INCENTIVE FUND (TIF) PROGRAM CFDA 84.374A

SIGNATURE PAGE

IN WITNESS WHEREOF, the parties hereto have executed the entire contents of this Memorandum of Understanding on the dates indicated below:

On Behalf of the Kingman Unified School District:

_____	**_____**
Superintendent	**President Governing Board**
Date: _____	**Date: _____**

On Behalf of Maricopa County Service Agency (MCESA):

_____	**_____**
Dr. Don Covey, Superintendent	**Ms. Kristine Morris, Chief Deputy Supt.**
Date: _____	**Date:_____**

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Appendix F – Other Documents

Evaluator Certification

Certified Evaluator Training I: Learning **Page 1**
Certified Evaluator Training I: Coaching **Page 2**
Certified Evaluator Training I: Leading **Page 3**

Certified Evaluator Training | Learning Observation Instrument
SY 2016-17

Certified Evaluator Training (CET) is the second phase of a two-phase model that begins with Qualified Evaluator Training (QET) whose purpose is to ensure that all evaluators understand the rubrics and elements they are assessing. Phase 2, CET, ensures all evaluators maintain accurate ratings in the field, implement effective observations and conferencing processes, and embed correct conferencing procedures into practice. Evaluators may earn up to ten micro-credentials* throughout the CET process.

Activity	Time Frame	Description
Calibration Cadres	Two sessions (estimated time per session: 2-hours)	• Instructional observations in live classrooms with scripting, scoring, and calibration discussion • Feedback provided on accuracy of scoring, scripting techniques, potential dialogue points for conferencing, questioning strategies, and effectiveness of reinforcement and refinement
Instructional Conferencing 1.0 & 2.0	6-hour workshops	• Participants will learn how to utilize highly effective post-conferencing skills to reinforce and refine LOI elements identified by a teacher as (s)he reflects, analyzes, demonstrates, and articulates levels of proficiency • Instructional Conferencing 1.0 is a prerequisite for 2.0
Full Co-Observation	(1) Learning Observation Cycle (approximately 3-4 hours)	• Participants receive feedback on accuracy of scoring scripting techniques, selection of conference objectives, questioning strategies, and effectiveness of reinforcement and refinement
Partial Co-Observation	Observation of specific settings based on need (approximately 3-4 hours)	• Evaluators complete specific settings of the Learning Observation Cycle with a field specialist, based on need • Participants receive feedback on accuracy of scoring, scripting techniques, selection of conference objectives, questioning strategies, and effectiveness of reinforcement and refinement
Video Scoring	3-hours	• Facilitated viewing and scoring of full and partial videos to build inter-rater agreement • Feedback to participants on the absolute score and rationale relative to participant scores • Includes discussion of quality of scripts, interpretation of scripts for scoring, interpretation of rubric language for scoring, common rater errors, etc. • Participant reflection on suggested refinement in their scoring practices
Additional Training	9+ hours	• Any custom combination of the previous components may be used to provide practice or intervention with administrators. • Additional specialized support for individuals or small groups may be offered to address scoring misconceptions or inaccuracies. • Training based on needs of evaluators

*Possible micro-credentials: 1) accuracy of scoring; 2) scripting techniques; 3) conference objectives; 4) questioning strategies; 5) reinforcement; 6) refinement; 7) quality of feedback; 8) rational of scores; 9) quality of script; 10) interpretation of rubric language

Certified Evaluator Training | Leading Observation Instrument
SY 2016-17

Certified Evaluator Training (CET) is the second phase of a two-phase model that begins with Qualified Evaluator Training (QET) whose purpose is to ensure that all evaluators understand the rubrics and elements they are assessing. Phase 2, CET, ensures all evaluators maintain accurate ratings in the field, implement effective observations and conferencing processes, and embed correct conferencing procedures into practice. Evaluators may earn up to ten micro-credentials* throughout the CET process.

Activity	Time Frame	Description
Co-Observations of Assigned Setting(s)	Observe appropriate settings (4-6 hours)	• Feedback provided on accuracy of scoring, scripting techniques, potential dialogue points for conferencing, questioning strategies, and effectiveness of reinforcement and refinement
Video Scoring	3 -4 hours	• Facilitated viewing and scoring of videos to build inter-rater agreement • Feedback to participants on the absolute score and rationale relative to participant scores • Includes discussion of quality of scripts, interpretation of scripts for scoring, interpretation of rubric language for scoring, common rater errors, etc. • Participant reflection on suggested refinement in their scoring practices
LdOI Conferencing	3 hours	• Further develops conferencing skills • Focuses on dialogue and deep questioning
Artifact Analysis	2 hours	• Analysis of documents in settings • Review of district capacity and usage of documents • Creation of documents collaboratively amongst leaders • Breakout format for LdOI and COI
Additional Training	7 hours	• Any custom combination of the previous components may be used to provide practice or intervention with administrators. • Additional specialized support for individuals or small groups may be offered to address scoring misconceptions or inaccuracies. • Training based on needs of evaluators

*Possible micro-credentials: 1) accuracy of scoring; 2) scripting techniques; 3) conference objectives; 4) questioning strategies; 5) reinforcement; 6) refinement; 7) quality of feedback; 8) rational of scores; 9) quality of script; 10) interpretation of rubric language

Certified Evaluator Training | Coaching Observation Instrument
SY 2016-17

Certified Evaluator Training (CET) is the second phase of a two-phase model that begins with Qualified Evaluator Training (QET) whose purpose is to ensure that all evaluators understand the rubrics and elements they are assessing. Phase 2, CET, ensures all evaluators maintain accurate ratings in the field, implement effective observations and conferencing processes, and embed correct conferencing procedures into practice. Evaluators may earn up to ten micro-credentials* throughout the CET process.

Activity	Time Frame	Description
Co-Observations of Assigned Setting(s)	Observe appropriate settings based on assignment 3-4hours)	• Feedback provided on accuracy of scoring, scripting techniques, potential dialogue points for conferencing, questioning strategies, and effectiveness of reinforcement and refinement
Video Scoring	3 hours	• Facilitated viewing and scoring of videos to build inter-rater agreement • Feedback to participants on the absolute score and rationale relative to participant scores • Includes discussion of quality of scripts, interpretation of scripts for scoring, interpretation of rubric language for scoring, common rater errors, etc. • Participant reflection on suggested refinement in their scoring practices
COI Conferencing	3 hours	• Further develops conferencing skills • Focuses on dialogue and deep questioning
Artifact Analysis	3 hours	• Analysis of documents in settings • Review of district capacity and usage of documents • Creation of documents • Breakout format for COI artifacts
Additional Training	7 hours	• Training based on needs of evaluators • Any custom combination of the previous components may be used to provide practice or intervention with evaluators • Additional specialized support for evaluators or small groups offered to address scoring misconceptions or inaccuracies

*Possible micro-credentials: 1) accuracy of scoring; 2) scripting techniques; 3) conference objectives; 4) questioning strategies; 5) reinforcement; 6) refinement; 7) quality of feedback; 8) rational of scores; 9) quality of script; 10) interpretation of rubric language

REIL - Extend Alliance Schools and Districts
Free and Reduced Lunch Rate

The Rewarding Excellence in Instruction and Leadership-Extend (REIL-Extend) schools qualify independently as required by the eligibility definitions in the U.S. Department of Education Teacher Incentive Fund request for proposals. As "high-need schools", all schools report to the Arizona Department of Education greater than 50% of their student population enrolled in the free or reduced-price lunch subsidy program as seen in the table below. For the purposes of equity, coherence, and cohesion, the Maricopa County Education Service Agency is partnering with school districts in which 100% of schools meet the "high-need" definition.

District	School	Percent Free and Reduced Lunch
Incito Charter School		
	Incito Schools	52%
Kingman Unified School District		
	Black Mountain Elementary School	86%
	Cerbat Elementary	84%
	Desert Willow Elementary School	84%
	Hualapai Elementary	57%
	Kingman High School	62%
	Kingman Middle School	73%
	La Senita Elementary	70%
	Lee Williams High School	47%
	Manzanita Elementary	66%
	Mt Tipton Elementary School	90%
	Palo Christi Elementary	72%
	White Cliffs Middle School	53%
Maricopa County Regional School District		
	Durango Traditional Learning Center	100%
	Hope College and Career Readiness Academy	100%
	Mesa Traditional Learning Center	100%
	New Leaf	100%
	Southwest Key Mesa	100%
	Southwest Key Tomas	100%
	Southwest Key Youngtown	100%
Mobile Elementary School District		
	Mobile Elementary School	80%
Nadaburg Unified School District		
	Desert Oasis Elementary School	57%
	Nadaburg Elementary School	75%
Roosevelt Elementary School District		
	Amy L. Houston Academy	85%

REIL - Extend Alliance Schools and Districts
Free and Reduced Lunch Rate

	Bernard Black Elementary School	80%
	C J Jorgensen School	80%
	C O Greenfield School	96%
	Cesar E Chavez Community School	96%
	Cloves C Campbell Sr Elementary School	86%
	Ed & Verma Pastor Elementary School	91%
	Ignacio Conchos School	86%
	Irene Lopez School	95%
	John F Kennedy Elementary School	81%
	John R Davis School	82%
	Martin Luther King Early Childhood Center	90%
	Maxine O Bush Elementary School	81%
	Percy L Julian School	94%
	Southwest Elementary School	85%
	Sunland Elementary School	82%
	T G Barr School	92%
	V H Lassen Elementary School	85%
	Valley View School	89%
Wilson School District		
	Wilson Primary School	99%
	Wilson Elementary School	72%

Entity Information

Incito Schools (078210000) Charter District

Entity Information	
Organization Name	Incito Schools
CTDS	078210000
Entity ID	91326
Organization Type	Charter District
Organization Status	OPEN
Indirect Cost Rate	0.00%
Authorized Representative(s)	Jelleson, Amanda
Legal Name	Incito Schools
Address	849 N 3RD AVE
City	PHOENIX
State	AZ
Zip Code	850031408
Congressional District	04 - Fourth Congressional District
DUNS Number	078292932
CCR Expiration Date	11/15/2016
High Risk Designation	No
General Statement of Assurance Upload Date	
Funding Applications	Funding Applications
Reimbursement Requests	Reimbursement Requests

State of Arizona
Department of Education
Office of Diane Douglas
Superintendent of Public Instruction

May 5, 2016

To: Maricopa County Education Service Agency

FY 2017 INDIRECT COST RATE NOTICE
FOR ADDITIONAL RATE ISSUED TO COUNTY EDUCATION SERVICE AGENCY

School District: **CTDS # 07-99-99-001**	**Maricopa County Education Service Agency**
Restricted Rate:	**9.60%**
Unrestricted Rate:	**9.60%**
Period Covered:	July 1, 2016 – June 30, 2017

The FY 2017 approved indirect cost rate is shown above. The rate is based upon the actual expenditures as presented to Arizona Department of Education (ADE) in the Superintendent of Schools Indirect Cost Plan for FY14-15. The rate is to be used by the Maricopa County Education Services Agency for any direct federal awards received.

The Restricted Rate is to be used for those programs that have supplement, non-supplant requirements such as Title I, Title VI, Vocational Education, Title VI-B of the IDEA, etc. The Unrestricted Rate is to be used for the Food Services Program that does not have the supplement, non-supplant requirements.

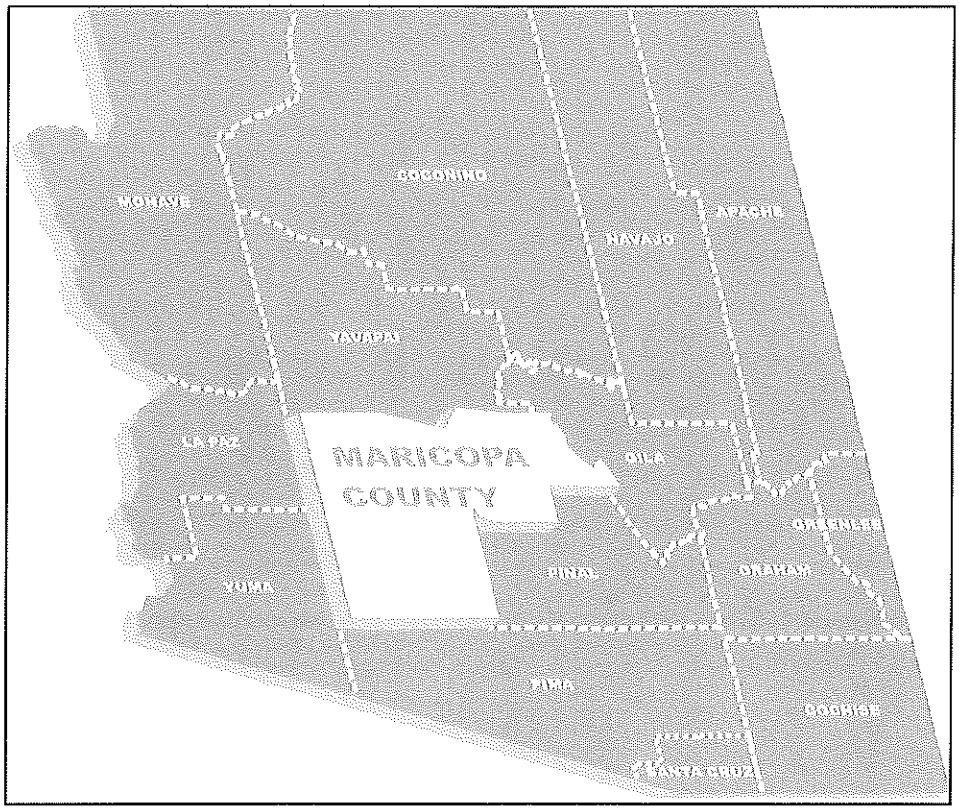
All costs of an indirect nature may not be directly charged to federal projects. Such costs may only be charged to a project by using the above-identified rates. Some federal programs may limit or prohibit the use of indirect and other administrative costs; the ADE program offices will provide notification of grants that contain these restrictions. Indirect cost limitations may not be exceeded.

The above rates are approved without audit and are subject to change in the event of an audit. If you have any questions regarding these rates, please call Gary Holland at [redacted]

MCESA Grants

Indirect Cost Plan FY16-17

Based on Actual Expenditures for the
Year Ended June 30, 2015



Maricopa County, Arizona

www.maricopa.gov

Maricopa County

Department of Finance

Shelby L. Scharbach
CPA, CGFM
Assistant County
Manager and
Chief Financial Officer
301 West Jefferson Street
Suite 960
Phoenix, AZ 85003-2143
Phone: 602.506-3561
Fax: 602.506-4451
www.maricopa.gov/finance

CERTIFICATE OF INDIRECT COSTS

This is to certify that I have reviewed the indirect cost rate proposal submitted herewith and to the best of my knowledge and belief:

1. All costs included in this proposal dated July 1, 2014 to June 30, 2015 (FY15) to establish billing or final indirect costs rates for July 1, 2016 to June 30, 2017 (FY17) are allowable in accordance with the requirements of the Federal award(s) to which they apply and the provision of 2 CFR Part 200, Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards. Unallowable costs have been adjusted for in allocating costs as indicated in the indirect cost proposal.

2. All costs included in this proposal are properly allocable to Federal awards on the basis of a beneficial or causal relationship between the expenses incurred and the agreements to which they are allocated in accordance with applicable requirements. Further, the same costs that have been treated as indirect costs have not been claimed as direct costs. Similar types of costs have been accounted for consistently and the Federal Government will be notified of any accounting changes that would affect the predetermined rate.

I declare that the foregoing is true and correct.

GOVERNMENT UNIT: Maricopa County

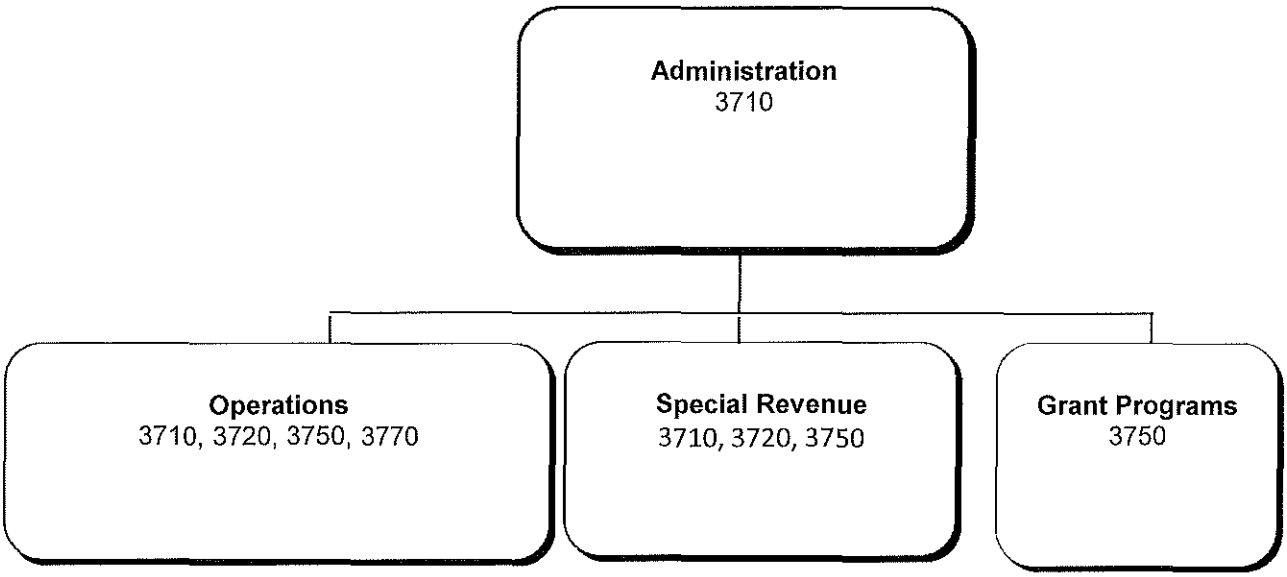
SIGNATURE: [redacted]

NAME OF OFFICIAL: Shelby L. Scharbach

TITLE: Assistant County Manager - Chief Financial Officer

DATE OF EXECUTION: July 1, 2016

Maricopa County
Education Service Agency
Organizational Structure



MARICOPA COUNTY
EDUCATION SERVICE AGENCY
DESCRIPTION OF ALLOCATED COSTS

COUNTYWIDE COST ALLOCATION

This category consists of countywide costs allocated to the Education Service Agency from the OMB Circular A-87 Cost Allocation Plan. Administration was allocated 100% of the costs.

ADMINISTRATION

These expenditures include the Budget, Communications and the Personnel department. These costs benefit Grant and non-Grant areas and were allocated based on salaries and benefits.

OPERATIONS

This area is responsible for all the statutory functions associated with the Education Service Agency. This includes the following divisions within the Education Service Agency: Administration, Economic Management and Technology, and Education Innovations. Departmental indirect costs were allocated to this category based on salaries and benefits.

SPECIAL REVENUE

This category was established to accumulate the indirect costs that benefit School District functions. Departmental indirect costs were allocated to this category based on salaries and benefits as applicable.

GRANT PROGRAMS

Indirect costs were allocated to this category based on salaries and benefits. The distribution base used to compute the indirect rate is the total direct program costs (excluding capital expenditures and other distorting items, such as pass through funds, major subcontractors, etc.). Total grant direct costs less capital and sub-recipient expenditures were $14,844,532.98.

MCESA
FY17 Indirect Cost Rate
(based on FY15 expenses)

Allocation	
A-87 County Wide	**679,500**
Total County Wide	679,500

Allocation of County Wide	Basis: Labor	% of Labor	Indirect Cost
Gen Fund (370)	1,374,764	12.23%	83,103
Grants Fund (371)	8,428,116	74.98%	509,471
Special Rev Fund (372,373,374,375,376)	1,438,003	12.79%	86,926
Total Operations	11,240,883	100.00%	679,500
Admin 370-3710(99AS, 99GV)	**448,932**		
	448,932		
Agrees To Pivot Table	11,689,815		

Allocation Costs

County Wide Indirect	679,500
Administration Services Labor	448,932
Administration Services Non Labor (Less Capital & other adjustments)	**775,074**
Total Administration	1,903,506

Allocation of Administration	Basis: Labor	% of Labor	Indirect Cost
Gen Fund (370)	1,374,764	12.23%	232,799
Special Rev Fund (372,373,374,375,376)	1,438,003	12.79%	243,508
Grants Fund (371)	8,428,116	74.98%	1,427,198
	11,240,883	100.00%	1,903,506
Admin 370-3710(99AS, 99GV)	448,932		
	448,932		
Agrees to Pivot Table	11,689,815	100.00%	1,903,506

GRANTS

Rate - County Wide (A87)	509,471	14,844,533	3.4%	
Rate - Department	917,727	14,844,533	6.2%	
Composite Rate	1,427,198	14,844,533	9.6%	

1,427,198	Total Allocated
509,471	County Wide
917,727	Departmental

Rate Base
The rate base was calculated as defined to the right.

19,203,404	Total for Schools Grants
(4,358,871)	Less: Distorting costs-Subrecipient
0	Less: Capital total for grants 900's
14,844,533	

Budget Narrative File(s)

*** Mandatory Budget Narrative Filename:** TIF 5 Budget Narrative MCESA.pdf

Add Mandatory Budget Narrative | Delete Mandatory Budget Narrative | View Mandatory Budget Narrative

To add more Budget Narrative attachments, please use the attachment buttons below.

Add Optional Budget Narrative | Delete Optional Budget Narrative | View Optional Budget Narrative

Tracking Number:GRANT12215655 Funding Opportunity Number:ED-GRANTS-053116-002 Received Date:Jul 15, 2016 02:30:38 AM EDT

Teacher Incentive Fund (TIF) Budget
REIL-Extend Budget Summary

Budget Category	Project Year 1	Project Year 2	Project Year 3	Project Year 4	Project Year 5	Total
1. Personnel	$ 2,111,600	$ 6,729,700	$ 8,766,661	$ 9,076,197	$ 8,679,700	$ 35,363,858
2. Fringe Benefits	$ 737,484	$ 1,779,065	$ 2,186,457	$ 2,248,364	$ 2,095,966	$ 9,047,336
3. Travel	$ 94,400	$ 68,600	$ 94,400	$ 68,600	$ 68,600	$ 394,600
4. Equipment	$ -	$ -	$ -	$ -	$ -	$ -
5. Supplies	$ 128,715	$ 55,715	$ 109,715	$ 109,715	$ 23,000	$ 426,860
6. Contractual	$ 991,500	$ 2,906,000	$ 2,730,000	$ 2,626,000	$ 2,130,000	$ 11,383,500
7. Construction	$ -	$ -	$ -	$ -	$ -	$ -
8. Other	$ 42,000	$ 32,000	$ 56,000	$ 16,000	$ 40,000	$ 186,000
9. Total Direct Costs	*$ 4,105,699*	*$ 11,571,080*	*$ 13,943,233*	*$ 14,144,876*	*$ 13,037,266*	*$ 56,802,154*
10. Indirect Costs	$ 382,627	$ 748,923	$ 741,992	$ 725,691	$ 597,242	$ 3,196,475
11. Training Stipends	$ -	$ -	$ -	$ -	$ -	$ -
12. TOTAL COSTS	**$ 4,488,326**	**$ 12,320,003**	**$ 14,685,225**	**$ 14,870,567**	**$ 13,634,508**	**$ 59,998,629**

Teacher Incentive Fund (TIF) Budget
REIL-Extend Detailed Budget Summary

Budget Category / Cost Description	Project Year 1	Project Year 2	Project Year 3	Project Year 4	Project Year 5	Total
1. Personnel						
1.1 - Project Director	$ 43,600	$ 87,200	$ 87,200	$ 87,200	$ 87,200	$ 392,400
1.2 - TIF5 Project Leader	$ 53,000	$ 106,000	$ 106,000	$ 106,000	$ 106,000	$ 477,000
1.3 - Opportunity Culture Project Leader	$ 96,000	$ 96,000	$ 96,000	$ 96,000	$ 72,000	$ 456,000
1.4 - Field Specialists	$ 432,000	$ 576,000	$ 576,000	$ 576,000	$ 576,000	$ 2,736,000
1.5 - Management Analyst	$ 76,000	$ 76,000	$ 76,000	$ 76,000	$ 57,000	$ 361,000
1.6 - Financial Business Systems Specialist	$ 38,000	$ 76,000	$ 76,000	$ 76,000	$ 76,000	$ 342,000
1.7 - Assessment Administrator	$ 49,000	$ 98,000	$ 98,000	$ 98,000	$ 73,500	$ 416,500
1.8 - Assessment Coordinator	$ 40,000	$ 80,000	$ 80,000	$ 80,000	$ 60,000	$ 340,000
1.9 - Measurement Coordinator	$ 40,000	$ 80,000	$ 80,000	$ 80,000	$ 60,000	$ 340,000
1.10 - Marketing / Communications Coordinator	$ 74,000	$ 74,000	$ 74,000	$ 74,000	$ 55,500	$ 351,500
1.11 - Leadership Administrator	$ 48,000	$ 96,000	$ 96,000	$ 96,000	$ 72,000	$ 408,000
1.12 - Learning, Leading, Coaching Cross-District Field Specialists	$ 261,000	$ 261,000	$ 261,000	$ 261,000	$ 261,000	$ 1,305,000
1.13 - Learning, Leading, Coaching Professional Development Coordinator	$ 41,500	$ 83,000	$ 83,000	$ 83,000	$ 62,250	$ 352,750
1.14 - Data Management System Project Leader	$ 81,000	$ 81,000	$ 81,000	$ 81,000	$ 60,750	$ 384,750
1.15 - Data System Specialist	$ 26,000	$ 52,000	$ 52,000	$ 52,000	$ 39,000	$ 221,000
1.16 - Videographers	$ 79,500	$ 106,000	$ 106,000	$ 106,000	$ 79,500	$ 477,000
1.17 - Graphic Designer	$ 29,000	$ 29,000	$ 29,000	$ 29,000	$ 21,750	$ 137,750
1.18 - Professional Development Resource Coordinator	$ 81,000	$ 81,000	$ 81,000	$ 81,000	$ 60,750	$ 384,750
1.19 - LMS Resource Coordinator	$ 81,000	$ 81,000	$ 81,000	$ 81,000	$ 60,750	$ 384,750
1.20 - Peer Evaluators	$ 158,000	$ 1,185,000	$ 1,185,000	$ 1,185,000	$ 888,750	$ 4,601,750
1.21 - Administrative Assistants	$ 72,000	$ 72,000	$ 72,000	$ 72,000	$ 72,000	$ 360,000
1.22 - Data Coordinators	$ 112,000	$ 112,000	$ 112,000	$ 112,000	$ 98,000	$ 546,000
Personnel - Staff Total	*$ 2,011,600*	*$ 3,588,200*	*$ 3,588,200*	*$ 3,588,200*	*$ 2,999,700*	*$ 15,775,900*
1. Personnel - Performance Based Compensation						
1.50 - Base Salary Increases	$ -	$ 749,000	$ 1,930,000	$ 3,111,000	$ 4,292,000	$ 10,082,000
1.51 - Retention Stipends	$ -	$ 2,012,000	$ 2,984,000	$ 2,256,000	$ 1,288,000	$ 8,540,000
1.52 - Performance Based Compensation Stipends	$ 50,000	$ -	$ -	$ -	$ -	$ 50,000
1.53 - Salary Enhancements for Reach Extension Positions	$ -	$ 328,000	$ 209,461	$ 43,497	$ -	$ 580,958
1.54 - Performance Based Compensation Stipends for Reach Associates	$ -	$ 22,500	$ 45,000	$ 67,500	$ 90,000	$ 225,000
1.55 - Human Resource Certification Recognition Stipends	$ 30,000	$ 30,000	$ 10,000	$ 10,000	$ 10,000	$ 90,000
1.56 - Certified Evaluator Micro-credential Stipends	$ 20,000	$ -	$ -	$ -	$ -	$ 20,000
Personnel - PBC Total	*$ 100,000*	*$ 3,141,500*	*$ 5,178,461*	*$ 5,487,997*	*$ 5,680,000*	*$ 19,587,958*
Personnel Total	*$ 2,111,600*	*$ 6,729,700*	*$ 8,766,661*	*$ 9,076,197*	*$ 8,679,700*	*$ 35,363,858*
2. Fringe Benefits						
2.1 - Fringe Benefits	$ 717,484	$ 1,150,765	$ 1,150,765	$ 1,150,765	$ 959,966	$ 5,129,745
2.2 - Performance Pay Fringe Benefits	$ 20,000	$ 628,300	$ 1,035,692	$ 1,097,599	$ 1,136,000	$ 3,917,591
Fringe Benefits Total	*$ 737,484*	*$ 1,779,065*	*$ 2,186,457*	*$ 2,248,364*	*$ 2,095,966*	*$ 9,047,336*
3. Travel						
3.1 - Travel to Annual TIF Grantee Meetings in Washington, DC for 3 Staff Members	$ 5,160	$ 5,160	$ 5,160	$ 5,160	$ 5,160	$ 25,800
3.2 - Travel to Annual Topic Meetings for 2 Staff Members	$ 3,440	$ 3,440	$ 3,440	$ 3,440	$ 3,440	$ 17,200
3.3 - Opportunity Culture Site Visit	$ 25,800	$ -	$ 25,800	$ -	$ -	$ 51,600
3.4 - Mileage Reimbursements	$ 60,000	$ 60,000	$ 60,000	$ 60,000	$ 60,000	$ 300,000
Travel Total	*$ 94,400*	*$ 68,600*	*$ 94,400*	*$ 68,600*	*$ 68,600*	*$ 394,600*
4. Equipment						
Equipment Total	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*
5. Supplies						
5.1 - Office Setups (Workstation and Technology for REIL Extend Staff)	$ 15,000	$ 15,000	$ 69,000	$ 69,000	$ -	$ 168,000
5.2 - General Supplies	$ 18,000	$ 18,000	$ 18,000	$ 18,000	$ 18,000	$ 90,000
5.3 - Video Production Supplies	$ 54,000	$ 5,000	$ 5,000	$ 5,000	$ 5,000	$ 74,000
5.4 - Video Conferencing Supplies	$ 24,000	$ -	$ -	$ -	$ -	$ 24,000
5.5 - Human Centered Design Training Supplies	$ 17,715	$ 17,715	$ 17,715	$ 17,715	$ -	$ 70,860
Supplies Total	*$ 128,715*	*$ 55,715*	*$ 109,715*	*$ 109,715*	*$ 23,000*	*$ 426,860*

Teacher Incentive Fund (TIF) Budget
REIL-Extend Detailed Budget Summary - Continued

Budget Category / Cost Description	Project Year 1	Project Year 2	Project Year 3	Project Year 4	Project Year 5	Total
6. Contractual						
6.1 - Human Capital Services/HR Certification Training/ Principal	$ -	$ 60,000	$ 60,000	$ 60,000	$ 60,000	$ 240,000
6.2 - Micro Credentialing (Digital Promise)	$ -	$ 10,000	$ -	$ -	$ -	$ 10,000
6.3 - Conference Registration and Membership Fees	$ 7,500	$ 7,500	$ 7,500	$ 7,500	$ 7,500	$ 37,500
6.4 - Registration Fees for Trainings	$ 7,500	$ 7,500	$ 7,500	$ 7,500	$ 7,500	$ 37,500
6.5 - Opportunity Culture (Public Impact)	$ 365,000	$ 320,000	$ 100,000	$ 50,000	$ 50,000	$ 885,000
6.6 - Assessment Development	$ 14,000	$ 15,000	$ 69,000	$ 15,000	$ 69,000	$ 182,000
6.7 - Data Management System Development	$ 500,000	$ 2,000,000	$ 2,000,000	$ 2,000,000	$ 1,500,000	$ 8,000,000
6.8 - Measurement Services	$ 50,000	$ 300,000	$ 300,000	$ 300,000	$ 250,000	$ 1,200,000
6.9 - Additional Measures for the Performance-Based Evaluation & Support System	$ -	$ 100,000	$ 100,000	$ 100,000	$ 100,000	$ 400,000
6.10 - Program Evaluation and Data Review Services	$ 30,000	$ 70,000	$ 70,000	$ 70,000	$ 70,000	$ 310,000
6.11 - Online Platform to Support Certified Evaluator Training and	$ 17,500	$ 16,000	$ 16,000	$ 16,000	$ 16,000	$ 81,500
Contractual Total	*$ 991,500*	*$ 2,906,000*	*$ 2,730,000*	*$ 2,626,000*	*$ 2,130,000*	*$ 11,383,500*
7. Construction						
Construction Total	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*
8. Other						
8.1 - Training Stipends/Substitute Pay for Reach Associates	$ 12,000	$ 32,000	$ 26,000	$ 16,000	$ 10,000	$ 96,000
8.2 - Stipends or Substitue Pay for Assessment Development	$ 30,000	$ -	$ 30,000	$ -	$ 30,000	$ 90,000
Other Total	*$ 42,000*	*$ 32,000*	*$ 56,000*	*$ 16,000*	*$ 40,000*	*$ 186,000*
9. Total Direct Costs	**$ 4,105,699**	**$ 11,571,080**	**$ 13,943,233**	**$ 14,144,876**	**$ 13,037,266**	**$ 56,802,154**
10. Indirect Costs	$ 382,627	$ 748,923	$ 741,992	$ 725,691	$ 597,242	$ 3,196,475
11. Training Stipends						
Training Stipends Total	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*
12. TOTAL COSTS	**$ 4,488,326**	**$ 12,320,003**	**$ 14,685,225**	**$ 14,870,567**	**$ 13,634,508**	**$ 59,998,629**

Teacher Incentive Fund (TIF) Budget

REIL-Extend Budget Narrative

Year 1

Personnel - $2,111,600

Personnel: The following requested personnel will be hired as employees of the project.	**No. of Positions**	**Total FTE**	**Base Salary**	**Total**
Project Director	1	0.40	$ 109,000	$ 43,600
TIF5 Project Leader	1	0.50	$ 106,000	$ 53,000
Opportunity Culture Project Leader	1	1.00	$ 96,000	$ 96,000
Field Specialists	6	4.50	$ 96,000	$ 432,000
Management Analyst	1	1.00	$ 76,000	$ 76,000
Financial Business Systems Specialist	1	0.50	$ 76,000	$ 38,000
Assessment Administrator	1	0.50	$ 98,000	$ 49,000
Assessment Coordinator	1	0.50	$ 80,000	$ 40,000
Measurement Coordinator	1	0.50	$ 80,000	$ 40,000
Marketing / Communications Coordinator	1	1.00	$ 74,000	$ 74,000
Leadership Administrator	1	0.50	$ 96,000	$ 48,000
Learning, Leading, Coaching Cross-District Field Specialists	3	3.00	$ 87,000	$ 261,000
Learning, Leading, Coaching Professional Development Coordinator	1	0.50	$ 83,000	$ 41,500
Data Management System Project Leader	1	1.00	$ 81,000	$ 81,000
Data System Specialist	1	0.50	$ 52,000	$ 26,000
Videographers	2	1.50	$ 53,000	$ 79,500
Graphic Designer	1	0.50	$ 58,000	$ 29,000
Professional Development Resource Coordinator	1	1.00	$ 81,000	$ 81,000
LMS Resource Coordinator	1	1.00	$ 81,000	$ 81,000
Peer Evaluators	2	2.00	$ 79,000	$ 158,000
Administrative Assistants	2	2.00	$ 36,000	$ 72,000
Data Coordinators	2	2.00	$ 56,000	$ 112,000
Total - Staff	*33*	*25.90*		*$ 2,011,600*
Performance Based Compensation Stipends				$ 50,000
Human Resource Certification Recognition Stipends				$ 30,000
Certified Evaluator Micro-credential Stipends				$ 20,000
Total Performance Based Compensation				*$ 100,000*
TOTAL PERSONNEL				**$ 2,111,600**

Project Director and TIF5 Project Leader

Duties: Responsible for leading program staff and partners to successfully complete all goals, objective and activities associated with *REIL-Extend*. Ensures efficient coordination and communication across all program partners. Will ensure successful completion of annual grant requirements, and work collaboratively with REIL Advisory Council, LEAs and grant Partners. (Objective 1.1, 1.2, 1.3, 1.4, 2.1)

Opportunity Culture Project Leader

Duties: Responsible for leading MCESA Opportunity Culture (OC) design team. Ensures effective implementation of OC initiative and adherence to guiding principles. Serves as point of contact for Public Impact and collaborates to monitor project progress. Manages the overall plan for the work. Ensures MCESA team builds capacity to ensure successful gradual release. (Objective 1.1, 1.2, 1.3, 2.1)

Field Specialist

Duties: Responsible for collaboratively building structures to sustain Human Capital Management and Performance Based Evaluation systems within their assigned LEA. Field Specialists will serve as the in-district program coordinators ensuring successful attainment of program goals. (Objective 1.2, 1.3, 1.4, 1.5)

Management Analyst

Duties: Responsible for maintaining detailed project management timelines for all *REIL-Extend* goals and objectives. A member of *REIL-Extend* Program Management Team who designs processes to support project directors and project leads with successful implementing, monitoring and reporting on grant goals, objectives, activities, milestones and performance measures. Performs comprehensive research and analysis on complex program issues and special projects. Prepares comprehensive reports and updates on project implementation and provides recommendations to grant project directors and project leads. (Objective 1.1, 1.2, 1.3, 1.4, 1.5, 2.1)

Financial/Business Systems Specialist

Duties: Responsible for managing the fiscal sustainability of *REIL-Extend* through leading and monitoring of all fiscal planning, transacting and documentation. Will assist in the financial modeling and support for development of financial systems that align with LEAs comprehensive HCMS. (Objective 1.2, 1.4, 1.5)

Assessment Administrator

Duties: Oversees work associated with researching, developing and validating multiple measures of educator effectiveness, including, but not limited to special area subjects. Will coordinate the assessment development activities to ensure all educators have multiple measures for determining effectiveness. Includes development and refreshing of student level assessments. (Objective 1.2, 2.1)

Assessment Coordinator

Duties: Responsible for development of multiple measures of educator effectiveness. Develops assessments for secure and non-secure interim assessments through the facilitation of assessment development committees. (Objective 1.2, 2.1)

Measurement Coordinator

Duties: Responsible for research and validation of multiple measures of educator effectiveness. Determines validity and reliability for secure and non-secure interim assessments through the facilitation of field testing, statistical analysis, and bias review assessment development. (Objective 1.2)

Marketing / Communications Coordinator

Duties: Will oversee implementation of cross-LEA communication plan and provide support for implementation of LEA-specific communication plans. Assist districts with development of targeted marketing campaigns to attracting quality educators that support districts common vision for instructional improvement. (Objective 1.1, 1.2, 1.3, 1.4)

Leadership Administrator

Duties: Responsible for ensuring effective and timely development, delivery and implementation of professional development aligned to Learning, Leading, and Coaching series. (Objective 1.2, 2.1)

Learning, Leading, Coaching Cross-District Field Specialists

Duties: Responsible for increasing and retaining the number of highly effective educators through professional development observation and evaluation aligned to Learning, Leading, and Coaching instruments. Ensuring job-embedded professional development in partner school districts. (Objective 1.2, 1.3, 2.1)

Learning, Leading, Coaching Professional Development Coordinator

Duties: Responsible for developing talent in teaching and leading by delivering professional development in content and pedagogy aligned to the Learning, Leading, and Coaching Observation Instruments. (Objective 1.2, 2.1)

Data Management System Project Leader

Duties: Responsible for developing and implementing a data management system to support all goals, objectives and activities associated with *REIL-Extend*. Collaborates with program partners and Arizona Department of Education. (Objective 1.1, 1.2, 2.1)

Data Systems Specialist

Duties: Responsible for collecting and analyzing student demographics, achievement, and educator evaluation data used to calculate the REIL score through communication and technical cooperation with partner school LEAs and the Arizona Department of Education. (Objective 2.1)

Videographer

Duties: Responsible for supporting the performance-based evaluation system through the technical production and electronic distribution of video aligned to Learning, Leading, and Coaching Observation Instruments. (Objective 1.2, 2.1)

Graphic Designer

Duties: Responsible for creating designs and concepts that will assist district with attracting educators to each LEA. Designs, builds, develops, tests, and maintains content for print, internet and/or intranet using various graphic software applications, programming languages, and other related technology tools. (Objective 1.2, 1.3)

Professional Development Resource Coordinator

Duties: Responsible for creating an online video bank of teaching and leading episodes that represent all elements and levels of the Learning, Leading, and Coaching Observation instruments. Aligning media resources to professional development modules to train teachers, coaches, and administrators on all elements of the Observation Instruments. (Objective 1.2, 2.1)

LMS Resource Coordinator

Duties: Responsible for coordination of course development for the on-line learning management system. Courses delivered via LMS will align directly to observation tools and will assist educators in receiving 'on-demand' professional learning aligned to their personalized Educator Goal Plan. (Objective 1.2)

Peer Evaluator

Duties: Responsible for increasing and retaining the number of effective and highly effective teachers and leaders; provide content-specific feedback to educators based on observations; support school leaders in applying the rubrics to increase accurate evaluation ratings; support Educator Goal Plans; provide as-needed support as part of district and school professional development. In the first year of the project only two peer evaluators are needed to support Nadaburg Unified School District. (Objective 1.2, 1.3, 1.4, 1.5)

Administrative Assistant (Program Director)

Duties: Responsible for assisting in the coordination of duties for *REIL-Extend* Program Director in support of the programs' goals, objectives and activities. Supports the day-to-day operations and maintains effective communication for the Program Director. (Objective 1.2)

Administrative Assistant (Assessment/Leadership)

Duties: Responsible for assisting the Rewarding Excellence in Instruction and Leadership – Extend assessment team in the coordination of developing valid and reliable assessments for secure and non-secure interim assessments through supporting the day-to-day operations and maintaining effective communication. Assist leadership team with development, delivery and implementation of professional development aligned to Learning, Leading, and Coaching series. (Objective 1.2)

Data Coordinator

Duties: The Data Coordinators works collaboratively with Project Directors and staff to ensure successful implementation of the program. Assists with data collection, analysis, and dissemination of communication. Works to design, implement, and support a program strategy that will result in increased student achievement. Gathers and reports on data and provides administrative support functions related to data collection, data integrity, data analysis, and program communication. (Objective 1.2, 1.3, 1.4, 2.1)

Note: all positions are based on a parity analysis and competitive with market ranges in the Phoenix Metropolitan area.

Performance Based Compensation Costs

Performance based compensation costs are captured in the Personnel section and the Benefits of 20% reside in the Benefit category below per the program instructions.

> **Performance Based Compensation Stipends** - In Year 1, the program will fund 20% of the ongoing Performance Based Compensation stipends for approximately 50 educators at Nadaburg Unified School District at a total estimated cost of $50,000.
>
> **Human Resource Certification Recognition Stipends** (30 recipients x $1,000 stipend = $30,000) for eligible Principals and Principal Supervisors, who demonstrate evidence of professional achievement and mastery of content knowledge and leadership skills. See section C.1 in project proposal for additional information.
>
> **Certified Evaluator Micro-credential Stipends** (20 recipients x $1,000 stipends = $20,000) for eligible Principals and Principal Supervisors who demonstrate evidence of professional achievement and mastery of content knowledge and leadership skills. See Competitive Preference Priority 1, Requirement 1, and sections A, B and C.1 in project proposal for additional information.

Fringe Benefits -$737,484

$717,484 Fringe benefits are calculated at $10,032 per FTE for fixed health/dental benefits plus 19.21% of salaries for variable costs which is the current benefit cost for Maricopa County.

$20,000 Fringe Benefits for Performance-Based Compensation variable benefit rate is calculated at 20% of salary expense, based on ASRS, Social Security and Medicare percentages.

Travel - $94,400

Travel	Unit/Quantity	Amount	Total
Annual Travel to TIF Grantee Meetings - Travel and accommodation costs for three staff members to attend an annual two-day conference in Washington, DC @ $1,720/staff member. The $1,720 in travel costs per staff member includes airfare ($750), lodging ($678), and per diem for four days ($242), and ground transportation ($50). (Program Requirement as noted in the grant specifications.)	3	$ 1,720	$ 5,160
Annual Travel to Topic Meetings - Travel and accommodation costs for two staff members to attend an annual two-day conference in Washington, DC @ $1,720/staff member. The $1,720 in travel costs per staff member includes airfare ($750), lodging ($678), and per diem for four days ($242), and ground transportation ($50). (Program Requirement as noted in the grant specifications.)	2	$ 1,720	$ 3,440
Opportunity Culture Site Visit - Travel and accommodation costs for fifteen staff members to attend a two-day site-visit to other schools implementing the Opportunity Culture Initiative in either Charlotte-Mecklenburg School District or Cabarrus County Schools in North Carolina @ $1,720/staff member. The $1,720 in travel costs per staff member includes airfare ($750), lodging ($678), and per diem for four days ($242), and ground transportation ($50). (Objective 1.3)	15	$ 1,720	$ 25,800
Mileage Reimbursements - Mileage Reimbursement for Field Specialists, Peer Evaluators, and other REIL Extend Staff to visit partner school districts across Maricopa County. All mileage costs are reimbursed at the approved Maricopa County rate. (Objective 1.2, 1.3, 1.4)			$ 60,000
Total Travel			**$ 94,400**

Travel expenses are included for required TIF grant responsibilities in the TIF community as well as professional development for informing and engaging key staff and district stakeholders in topics detailed within the project management plan.

Equipment - $0

Supplies - $128,715

Supplies	Unit/Quantity	Amount	Total
Office Setups (Workstation and Technology for REIL Extend Staff) - We anticipate REIL Extend staff will only require 5 office setups during the first year of the project as most staff will utilize those that have been previously purchased.	5	$ 3,000	$ 15,000
General Office Supplies (office supplies, research materials, education materials)	50	$ 360	$ 18,000
Video Production Supplies - These supplies are essential for supporting the performance based evaluation system through the technical production and electronic distribution of video aligned to the observation instruments. These supplies include cameras, tripods, mics, SD cards, camera batteries, LED lights, color gels, studio mics, photography light kit, audio mixer, and software licenses.	1	$ 54,000	$ 54,000
Video Conferencing Supplies (video cameras and microphones) for classroom observations, planning meetings and instructional conferencing for rural school districts (i.e. Kingman Unified School District)	12	$ 2,000	$ 24,000
Human Centered Design Training Supplies - Workshop supplies including chart paper, post-it notes, journals and manipulatives. Costs are estimated at a cost of $15 per participant for 1,181 participants.	1,181	$ 15	$ 17,715
Total Supplies			**$ 128,715**

Supplies will assist in achieving program and grant goals by providing the necessary materials and supplies to achieve desired results. The cost estimates for the supplies are based on our current annual budget amount per employee for general supplies. (Objective 1.1, 1.2, 1.3, 1.4, 1.5, 2.1)

Year one includes the investment in the video production and video conferencing supplies that will be utilized throughout the project. (Objective 1.1, 1.2, 1.3, 1.4, 1.5, 2.1)

Contractual - $991,500

Contractual	Total
Conference Registration and Membership Fees	$ 7,500
Registration Fees for Trainings	$ 7,500
Opportunity Culture (Public Impact)	$ 365,000
Assessment Development	$ 14,000
Data Management System Development	$ 500,000
Measurement Services	$ 50,000
Program Evaluation and Data Review Services	$ 30,000
Online Platform to Support Certified Evaluator Training and Assessment	$ 17,500
Total Contractual	**$ 991,500**

Cost estimates for the contractual services listed are based on the current market rates for obtaining the services described above. All costs listed above will be charged to the grant. The listed contractual services will facilitate the grant program's success in the implementation and development of creating sustainable performance-based compensation systems, increasing student achievement and additional goals as stated in the program narrative. Named contractors

have been procured using appropriate procurement procedures in accordance with 2 C.F.R. 200.317 - 200.326, 34 C.F.R. 75.135 and the Maricopa County Procurement Code.

Conference Registration and Memberships Fees

Registration and membership fees for *REIL-Extend* Program staff to: attend conferences that align with program goals (e.g., annual ADE-sponsored Leading Change Conference); receive memberships in organizations that align to program goals (e.g., Arizona School Personnel Administrators Association) in order to build, maintain, and enhance knowledge and skills in focus area.

Registration Fees for Training

Registration fees for *REIL-Extend* Program staff to attend content specific training related to: HCMS strategies; implementation of performance-based evaluation and support systems; facilitation/communication related to stakeholder engagement; and strategic compensation. Trainings will support LEA implementation of *REIL-Extend*.

Opportunity Culture (Public Impact)

Lead the OC design and implementation process with district and school design teams. Establish a scope and sequence of support; provide resources and feedback. Ensure that MCESA staff have a thorough understanding of the OC principles, the design and implementation processes, as well as potential challenges that could occur during design and implementation. Navigate state policy in order to establish the parameters and goals that will drive the work at the district and school level. Develop site-specific materials as needed. Support district recruitment and selection. Plan and deliver design sessions. Lead one-on-one coaching calls with district leads. Review and provide feedback on deliverables. Support recruitment and selection. Work with the district HR staff to create recruitment and selection processes for these demanding new roles. Build local district leadership capacity.

Assessment Development

Assessments for non-state-tested content areas will be developed for identified tasks in the assessment development process. Tests will be purchased for subject areas that are available in the market to ensure that each teacher's evaluation reflects classroom-level data.

Data Management System Development

Contractual services costs to support the development, integration, operations, and maintenance of various components, including identifying the requirements and building out the HCMS portion of the system. This would include reporting tools (e.g., monitoring assignment of teachers to schools, equitable distribution of teachers, and so on).Costs to support Student-Teacher Link; the Content & Learning Management System; Data Management System

Integration and Dashboard Set-up Services to produce a REIL Score; Assessment Delivery Platform for non-tested subject areas; and an Educator Goal Plan System to ensure each educator has a plan for on-going instructional improvement. Each of these systems will be part of the REILize Decision Support System (RDSS).

Measurement Services

Measurement Services include support and ongoing technical assistance related to implementation of the *REIL-Extend* multi-measure system including: refinements to and calculation of the REIL score (overall effectiveness rating); implementation of professional practice and student growth measures in alignment with the State's Measuring Educator Effectiveness Framework; collaboration with the Arizona Department of Education to inform data dashboard and report development and data file transfers/cleansing; support for working teams as delineated in the communication structure; and advisement and support for development and dissemination of educator guidebooks and quick guides. MCESA will contract with Basis Policy Research to conduct the measurement development and calculation of overall effectiveness ratings for educators and coordinate with Arizona Department of Education on data file exchanges and data displays. Please see section A and B of the project proposal for more information on the measurement design and implementation.

Program Evaluation and Data Review Services

Program Evaluation and Data Review Services will support successful completion of the management plan including monitoring and reporting on program goals, objectives and performance measures. These services will include quarterly data review workshops with the *REIL-Extend* management team to facilitate interim feedback processes in order to provide timely feedback to inform necessary program adjustments in order to meet program goals. These services will support the monitoring of LEA progress toward HR alignment and use of HCMS practices as well as the monitoring and reporting on core program components including: inter-rater agreement/reliability; power indicators and early warning indicators resulting from observation data review; educator retention outcomes; and monitoring of performance classification distributions. Additional services include gathering of stakeholder feedback through site visits, focus group interviews, and structured interviews and the resulting reporting including formative as well as summative reports. These services will also include supporting the work of the *REIL-Extend* Advisory Council by sharing ongoing data and results and collecting feedback to inform communication dissemination efforts. MCESA plans to contract with Basis Policy Research to conduct the local evaluation, using both qualitative and quantitative data analysis. MCESA expects to receive ongoing evaluation reports per the *Timeline of Key Evaluation Events* in Section D of the project proposal. Section D also contains more information on the evaluation design and data review services.

Online Platform to Support Certified Evaluator Training and Assessment

Observation Engine, which is a paid service that provides access to video clips and an online testing tool, will be used as a component of Certified Evaluator Training.

Construction - $0

Other Costs - $42,000

Stipend and Substitute Pay for Reach Associates: Off-Contract Pay or Substitute Pay ($12,000) will allow 24 Opportunity Culture Reach Associates at Opportunity Culture Schools to attend four days of professional development at an estimated cost of $125 per day. (Objective 1.3)

Stipend and Substitute Pay for Assessment Development: Off-Contract Pay or Substitute Pay ($30,000) will allow teachers to develop assessments at an estimated cost of $125 per day. (Objective 1.2, 2.1)

Year 1 Direct Costs - $4,105,699

Year 1 Indirect Costs - $382,627

Provide Administrative, Fiscal, Technological management and support for the programs including financial reporting, procurement efforts, and Human Resources. Indirect Costs are calculated at the approved Restricted Indirect Cost Rate of 9.6% of eligible direct costs.

Year 1 Total Costs - $4,488,326

Teacher Incentive Fund (TIF) Budget

REIL-Extend Budget Narrative

Year 2

Personnel - $6,729,700

Personnel: The following requested personnel will be hired as employees of the project.	No. of Positions	FTE	Base Salary	Total
Project Director	1	0.80	$ 109,000	$ 87,200
TIF5 Project Leader	1	1.00	$ 106,000	$ 106,000
Opportunity Culture Project Leader	1	1.00	$ 96,000	$ 96,000
Field Specialists	6	6.00	$ 96,000	$ 576,000
Management Analyst	1	1.00	$ 76,000	$ 76,000
Financial Business Systems Specialist	1	1.00	$ 76,000	$ 76,000
Assessment Administrator	1	1.00	$ 98,000	$ 98,000
Assessment Coordinator	1	1.00	$ 80,000	$ 80,000
Measurement Coordinator	1	1.00	$ 80,000	$ 80,000
Marketing / Communications Coordinator	1	1.00	$ 74,000	$ 74,000
Leadership Administrator	1	1.00	$ 96,000	$ 96,000
Learning, Leading, Coaching Cross-District Field Specialists	3	3.00	$ 87,000	$ 261,000
Learning, Leading, Coaching Professional Development Coordinator	1	1.00	$ 83,000	$ 83,000
Data Management System Project Leader	1	1.00	$ 81,000	$ 81,000
Data System Specialist	1	1.00	$ 52,000	$ 52,000
Videographers	2	2.00	$ 53,000	$ 106,000
Graphic Designer	1	0.50	$ 58,000	$ 29,000
Professional Development Resource Coordinator	1	1.00	$ 81,000	$ 81,000
LMS Resource Coordinator	1	1.00	$ 81,000	$ 81,000
Peer Evaluators	15	15.00	$ 79,000	$ 1,185,000
Administrative Assistants	2	2.00	$ 36,000	$ 72,000
Data Coordinators	2	2.00	$ 56,000	$ 112,000
Total - Staff	*46*	*45.30*		*$ 3,588,200*
Base Salary Increases				$ 749,000
Retention Stipends				$ 2,012,000
Salary Enhancements for Reach Extension Positions				$ 328,000
Performance Based Compensation Stipends for Reach Associates				$ 22,500
Human Resource Certification Recognition Stipends				$ 30,000
Total Performance Based Compensation				*$ 3,141,500*
TOTAL PERSONNEL				**$ 6,729,700**

Project Director and TIF5 Project Leader

Duties: Responsible for leading program staff and partners to successfully complete all goals, objective and activities associated with *REIL-Extend*. Ensures efficient coordination and communication across all program partners. Will ensure successful completion of annual grant requirements, and work collaboratively with REIL Advisory Council, LEAs and grant Partners. (Objective 1.1, 1.2, 1.3, 1.4, 2.1)

Opportunity Culture Project Leader

Duties: Responsible for leading MCESA Opportunity Culture (OC) design team. Ensures effective implementation of OC initiative and adherence to guiding principles. Serves as point of contact for Public Impact and collaborates to monitor project progress. Manages the overall plan for the work. Ensures MCESA team builds capacity to ensure successful gradual release. (Objective 1.1, 1.2, 1.3, 2.1)

Field Specialist

Duties: Responsible for collaboratively building structures to sustain Human Capital Management and Performance Based Evaluation systems within their assigned LEA. Field Specialists will serve as the in-district program coordinators ensuring successful attainment of program goals. (Objective 1.2, 1.3, 1.4, 1.5)

Management Analyst

Duties: Responsible for maintaining detailed project management timelines for all *REIL-Extend* goals and objectives. A member of *REIL-Extend* Program Management Team who designs processes to support project directors and project leads with successful implementing, monitoring and reporting on grant goals, objectives, activities, milestones and performance measures. Performs comprehensive research and analysis on complex program issues and special projects. Prepares comprehensive reports and updates on project implementation and provides recommendations to grant project directors and project leads. (Objective 1.1, 1.2, 1.3, 1.4, 1.5, 2.1)

Financial/Business Systems Specialist

Duties: Responsible for managing the fiscal sustainability of *REIL-Extend* through leading and monitoring of all fiscal planning, transacting and documentation. Will assist in the financial modeling and support for development of financial systems that align with LEAs comprehensive HCMS. (Objective 1.2, 1.4, 1.5)

Assessment Administrator

Duties: Oversees work associated with researching, developing and validating multiple measures of educator effectiveness, including, but not limited to special area subjects. Will coordinate the assessment development activities to ensure all educators have multiple measures for determining effectiveness. Includes development and refreshing of student level assessments. (Objective 1.2, 2.1)

Assessment Coordinator

Duties: Responsible for development of multiple measures of educator effectiveness. Develops assessments for secure and non-secure interim assessments through the facilitation of assessment development committees. (Objective 1.2, 2.1)

Measurement Coordinator

Duties: Responsible for research and validation of multiple measures of educator effectiveness. Determines validity and reliability for secure and non-secure interim assessments through the facilitation of field testing, statistical analysis, and bias review assessment development. (Objective 1.2)

Marketing / Communications Coordinator

Duties: Will oversee implementation of cross-LEA communication plan and provide support for implementation of LEA-specific communication plans. Assist districts with development of targeted marketing campaigns to attracting quality educators that support districts common vision for instructional improvement. (Objective 1.1, 1.2, 1.3, 1.4)

Leadership Administrator

Duties: Responsible for ensuring effective and timely development, delivery and implementation of professional development aligned to Learning, Leading, and Coaching series. (Objective 1.2, 2.1)

Learning, Leading, Coaching Cross-District Field Specialists

Duties: Responsible for increasing and retaining the number of highly effective educators through professional development observation and evaluation aligned to Learning, Leading, and Coaching instruments. Ensuring job-embedded professional development in partner school districts. (Objective 1.2, 1.3, 2.1)

Learning, Leading, Coaching Professional Development Coordinator

Duties: Responsible for developing talent in teaching and leading by delivering professional development in content and pedagogy aligned to the Learning, Leading, and Coaching Observation Instruments. (Objective 1.2, 2.1)

Data Management System Project Leader

Duties: Responsible for developing and implementing a data management system to support all goals, objectives and activities associated with *REIL-Extend*. Collaborates with program partners and Arizona Department of Education. (Objective 1.1, 1.2, 2.1)

Data Systems Specialist

Duties: Responsible for collecting and analyzing student demographics, achievement, and educator evaluation data used to calculate the REIL score through communication and technical cooperation with partner school LEAs and the Arizona Department of Education. (Objective 2.1)

Videographer

Duties: Responsible for supporting the performance-based evaluation system through the technical production and electronic distribution of video aligned to Learning, Leading, and Coaching Observation Instruments. (Objective 1.2, 2.1)

Graphic Designer

Duties: Responsible for creating designs and concepts that will assist district with attracting educators to each LEA. Designs, builds, develops, tests, and maintains content for print, internet and/or intranet using various graphic software applications, programming languages, and other related technology tools. (Objective 1.2, 1.3)

Professional Development Resource Coordinator

Duties: Responsible for creating an online video bank of teaching and leading episodes that represent all elements and levels of the Learning, Leading, and Coaching Observation instruments. Aligning media resources to professional development modules to train teachers, coaches, and administrators on all elements of the Observation Instruments. (Objective 1.2, 2.1)

LMS Resource Coordinator

Duties: Responsible for coordination of course development for the on-line learning management system. Courses delivered via LMS will align directly to observation tools and will assist educators in receiving 'on-demand' professional learning aligned to their personalized Educator Goal Plan. (Objective 1.2)

Peer Evaluator

Duties: Responsible for increasing and retaining the number of effective and highly effective teachers and leaders; provide content-specific feedback to educators based on observations; support school leaders in applying the rubrics to increase accurate evaluation ratings; support Educator Goal Plans; provide as-needed support as part of district and school professional development. Fifteen peer evaluators will be required to support the entire alliance. (Objective 1.2, 1.3, 1.4, 1.5)

Administrative Assistant (Program Director)

Duties: Responsible for assisting in the coordination of duties for *REIL-Extend* Program Director in support of the programs' goals, objectives and activities. Supports the day-to-day operations and maintains effective communication for the Program Director. (Objective 1.2)

Administrative Assistant (Assessment/Leadership)

Duties: Responsible for assisting the Rewarding Excellence in Instruction and Leadership – Extend assessment team in the coordination of developing valid and reliable assessments for secure and non-secure interim assessments through supporting the day-to-day operations and maintaining effective communication. Assist leadership team with development, delivery and implementation of professional development aligned to Learning, Leading, and Coaching series. (Objective 1.2)

Data Coordinator

Duties: The Data Coordinators works collaboratively with Project Directors and staff to ensure successful implementation of the program. Assists with data collection, analysis, and dissemination of communication. Works to design, implement, and support a program strategy that will result in increased student achievement. Gathers and reports on data and provides administrative support functions related to data collection, data integrity, data analysis, and program communication. (Objective 1.2, 1.3, 1.4, 2.1)

Note: all positions are based on a parity analysis and competitive with market ranges in the Phoenix Metropolitan area.

Performance Based Compensation Cost:

Performance based compensation costs are captured in the Personnel section and the Benefits of 20% reside in the Benefit category below per the program instructions.

Base Salary Increases: In FY 2018 (program Year 2), $749,000 will be awarded to effective and highly effective teachers, principals, and assistant principals according to LEA-specific salary structure based on effectiveness.

Average Performance-Based Compensation			
	FTE	Total Award	Average
Teacher	708	$708,000	$1,000
Principal/Assistant Principal	41	$41,000	$1,000

Retention Stipends: In FY 2018 (program Year 2): In FY 2018 (program Year 2), $2,012,000 will be awarded to effective/highly effective teachers, principals, and assistant principals who remain in their LEA. Retention stipend will be differentiated based on school assignment (Spotlight/non-Spotlight).

Retention Stipend Distribution			
School Type	Stipend Amount	FTE	Total $
Non-Spotlight	$3,000	404	$1,212,00
Spotlight	$5,000	160	$800,000
		Total Retention Stipend	$2,012,000

Salary Enhancements for Reach Extension Positions ($328,000) will be provided to support pay supplements awarded to highly effective teachers/school leaders serving in a reach extension position at a Spotlight School (e.g., Multi-Classroom Leader) for assuming additional roles and responsibilities.

Performance Based Compensation Stipends for Reach Associates ($22,500) will be provided to support pay supplements awarded to effective staff serving in a reach associate position at a Spotlight School model at a cost of $1,500 per position.

Human Resource Certification Recognition Stipends (30 recipients x $1,000 stipend = $30,000) for eligible Principals and Principal Supervisors who demonstrate evidence of professional achievement and mastery of content knowledge and leadership skills. See section C.1 in project proposal for additional information.

Fringe Benefits -$1,779,065

$1,150,765 Fringe benefits are calculated at $10,032 per FTE for fixed health/dental benefits plus 19.21% of salaries for variable costs which is the current benefit cost for Maricopa County.

$628,300 Fringe Benefits for Performance-Based Compensation variable benefit rate is calculated at 20% of salary expense, based on ASRS, Social Security and Medicare percentages.

Travel - $68,600

Travel	Unit/Quantity	Amount	Total
Annual Travel to TIF Grantee Meetings - Travel and accommodation costs for three staff members to attend an annual two-day conference in Washington, DC @ $1,720/staff member. The $1,720 in travel costs per staff member includes airfare ($750), lodging ($678), and per diem for four days ($242), and ground transportation ($50). (Program Requirement as noted in the grant specifications.)	3	$ 1,720	$ 5,160
Annual Travel to Topic Meetings - Travel and accommodation costs for two staff members to attend an annual two-day conference in Washington, DC @ $1,720/staff member. The $1,720 in travel costs per staff member includes airfare ($750), lodging ($678), and per diem for four days ($242), and ground transportation ($50). (Program Requirement as noted in the grant specifications.)	2	$ 1,720	$ 3,440
Mileage Reimbursements - Mileage Reimbursement for Field Specialists, Peer Evaluators, and other REIL Extend Staff to visit partner school districts across Maricopa County. All mileage costs are reimbursed at the approved Maricopa County rate. (Objective 1.2, 1.3, 1.4)			$ 60,000
Total Travel			**$ 68,600**

Travel expenses are included for required TIF grant responsibilities in the TIF community as well as professional development for informing and engaging key staff and district stakeholders in topics detailed within the project management plan.

Equipment - $0

Supplies - $55,715

Supplies	Unit/Quantity	Amount	Total
Office Setups (Workstation and Technology for REIL Extend Staff) - We anticipate REIL Extend staff will only require 5 office setups during the second year of the project as most staff will utilize those that have been previously purchased.	5	$ 3,000	$ 15,000
General Office Supplies (office supplies, research materials, education materials)	50	$ 360	$ 18,000
Video Production Supplies Replacement Costs - These supplies are essential for supporting the performance based evaluation system through the technical production and electronic distribution of video aligned to the observation instruments. These supplies include cameras, tripods, mics, SD cards, camera batteries, LED lights, color gels, studio mics, photography light kit, audio mixer, and software licenses.	1	$ 5,000	$ 5,000
Human Centered Design Training Supplies - Workshop supplies including chart paper, post-it notes, journals and manipulatives. Costs are estimated at a cost of $15 per participant for 1,181 participants.	1,181	$ 15	$ 17,715
Total Supplies			**$ 55,715**

Supplies will assist in achieving program and grant goals by providing the necessary materials and supplies to achieve desired results. The cost estimates for the supplies are based on our current annual budget amount per employee for general supplies. (Objective 1.1, 1.2, 1.3, 1.4, 1.5, 2.1)

Contractual - $2,906,000

Contractual	Total
Human Capital Services/HR Certification Training/ Principal Supervisor Training	$ 60,000
Micro Credentialing (Digital Promise)	$ 10,000
Conference Registration and Membership Fees	$ 7,500
Registration Fees for Trainings	$ 7,500
Opportunity Culture (Public Impact)	$ 320,000
Assessment Development	$ 15,000
Data Management System Development	$ 2,000,000
Measurement Services	$ 300,000
Additional Measures for the Performance-Based Evaluation & Support	$ 100,000
Program Evaluation and Data Review Services	$ 70,000
Online Platform to Support Certified Evaluator Training and Assessment	$ 16,000
Total Contractual	**$ 2,906,000**

Cost estimates for the contractual services listed are based on the current market rates for obtaining the services described above. All costs listed above will be charged to the grant. The listed contractual services will facilitate the grant program's success in the implementation and development of creating sustainable performance-based compensation systems, increasing student achievement and additional goals as stated in the program narrative. Named contractors have been procured using appropriate procurement procedures in accordance with 2 C.F.R. 200.317 - 200.326, 34 C.F.R. 75.135 and the Maricopa County Procurement Code.

Human Capital Services/HR Certification Training/ Principal Supervisor Training

Provide MCESA and LEA Staff with the knowledge, skills, and abilities to sustain effective HCMS systems; provide recognition to district and school leaders who acquire HCMS-specific competencies during the grant period (see requirement 1 section I grant proposal) to demonstrate evidence of professional achievement and mastery of content knowledge and leadership skills; Batelle for Kids (a non-profit organization that has extensive experience supporting HCMS work in the field and has developed national HR standards), will provide the Human Resource Education Certification Program. New York City Leadership Academy (a non-profit organization that has extensive experience in training and coaching school leaders) will provide support for principal supervisor training, in alignment with HCMS practices.

Micro-Credentialing (Digital Promise)

Digital Promise will partner with *REIL-Extend* program staff to create ten micro-credentials. The micro-credentials will provide evaluators with a way to gain validated recognition for the skills and competencies they bring to evaluation as well as those they learn throughout the Qualified and Certified Evaluator processes.

Conference Registration and Memberships Fees

Registration and membership fees for *REIL-Extend* Program staff to: attend conferences that align with program goals (e.g., annual ADE-sponsored Leading Change Conference); receive memberships in organizations that align to program goals (e.g., Arizona School Personnel Administrators Association) in order to build, maintain, and enhance knowledge and skills in focus area.

Registration Fees for Training

Registration fees for *REIL-Extend* Program staff to attend content specific training related to: HCMS strategies; implementation of performance-based evaluation and support systems; facilitation/communication related to stakeholder engagement; and strategic compensation. Trainings will support LEA implementation of *REIL-Extend*.

Opportunity Culture (Public Impact)

REIL-Extend will contract with Public Impact who will provide technical assistance serve in a limited technical assistance. Troubleshoot design or implementation issues, collect and analyze data that can serve as proof points, and document and publish results and case studies, as applicable.

Assessment Development

Assessments for non-state-tested content areas will be developed for identified tasks in the assessment development process. Tests will be purchased for subject areas that are available in the market to ensure that each teacher's evaluation reflects classroom-level data.

Data Management System Development

Contractual services costs to support the development, integration, operations, and maintenance of various components, including identifying the requirements and building out the HCMS portion of the system. This would include reporting tools (e.g., monitoring assignment of teachers to schools, equitable distribution of teachers, and so on).Costs to support Student-Teacher Link; the Content & Learning Management System; Data Management System Integration and Dashboard Set-up Services to produce a REIL Score; Assessment Delivery Platform for non-tested subject areas; and an Educator Goal Plan System to ensure each educator has a plan for on-going instructional improvement. Each of these systems will be part of the REILize Decision Support System (RDSS).

Measurement Services

Measurement Services include support and ongoing technical assistance related to implementation of the *REIL-Extend* multi-measure system including: refinements to and calculation of the REIL score (overall effectiveness rating); implementation of professional practice and student growth measures in alignment with the State's Measuring Educator Effectiveness Framework; collaboration with the Arizona Department of Education to inform data dashboard and report development and data file transfers/cleansing; support for working teams as delineated in the communication structure; and advisement and support for development and dissemination of educator guidebooks and quick guides. MCESA will contract with Basis Policy Research to conduct the measurement development and calculation of overall effectiveness ratings for educators and coordinate with Arizona Department of Education on data file exchanges and data displays. Please see section A and B of the project proposal for more information on the measurement design and implementation.

Additional Measures for the Performance-Based Evaluation & Support System

Measurement services include support and ongoing technical assistance related to implementation of the *REIL-Extend* Framework for Measuring Educator Effectiveness (e.g., Student surveys, professional responsibilities rubric).Support for working teams as delineated in the communication structure; and advisement and support for development and dissemination of educator guidebooks and quick guides. Additional measure services include support for identification, development, and/or procurement of additional measures to be included in *REIL-Extend's* Performance-Based Evaluation & Support System (e.g., student/staff surveys; professional responsibilities rubric) in order to align with the State's framework requiring: (1) teacher performance and professional practice; and (2) student academic progress.

Program Evaluation and Data Review Services

Program Evaluation and Data Review Services will support successful completion of the management plan including monitoring and reporting on program goals, objectives and performance measures. These services will include quarterly data review workshops with the *REIL-Extend* management team to facilitate interim feedback processes in order to provide timely feedback to inform necessary program adjustments in order to meet program goals. These services will support the monitoring of LEA progress toward HR alignment and use of HCMS practices as well as the monitoring and reporting on core program components including: inter-rater agreement/reliability; power indicators and early warning indicators resulting from observation data review; educator retention outcomes; and monitoring of performance classification distributions. Additional services include gathering of stakeholder feedback through site visits, focus group interviews, and structured interviews and the resulting reporting including formative as well as summative reports. These services will also include supporting the work of the *REIL-Extend* Advisory Council by sharing ongoing data and results and collecting feedback to inform communication dissemination efforts. MCESA plans to contract with Basis Policy Research to conduct the local evaluation, using both qualitative and quantitative data analysis. MCESA expects to receive ongoing evaluation reports per the *Timeline of Key Evaluation Events* in Section D of the project proposal. Section D also contains more information on the evaluation design and data review services.

Online Platform to Support Certified Evaluator Training and Assessment

Observation Engine, which is a paid service that provides access to video clips and an online testing tool, will be used as a component of Certified Evaluator Training.

Construction - $0

Other Costs - $32,000

Stipend and Substitute Pay for Reach Associates: Off-Contract Pay or Substitute Pay ($32,000) will allow 56 Opportunity Culture Reach Associates at Opportunity Culture Schools to attend four to five days of professional development at an estimated cost of $125 per day. (Objective 1.3)

Year 2 Direct Costs - $11,571,080

Year 2 Indirect Costs - $748,923

Provide Administrative, Fiscal, Technological management and support for the programs including financial reporting, procurement efforts, and Human Resources. Indirect Costs are calculated at the approved Restricted Indirect Cost Rate of 9.6% of eligible direct costs.

Year 2 Total Costs - $12,320,003

Teacher Incentive Fund (TIF) Budget

REIL-Extend Budget Narrative

Year 3

Personnel - $8,766,661

Personnel: The following requested personnel will be hired as employees of the project.	No. of Positions	FTE	Base Salary	Total
Project Director	1	0.80	$ 109,000	$ 87,200
TIF5 Project Leader	1	1.00	$ 106,000	$ 106,000
Opportunity Culture Project Leader	1	1.00	$ 96,000	$ 96,000
Field Specialists	6	6.00	$ 96,000	$ 576,000
Management Analyst	1	1.00	$ 76,000	$ 76,000
Financial Business Systems Specialist	1	1.00	$ 76,000	$ 76,000
Assessment Administrator	1	1.00	$ 98,000	$ 98,000
Assessment Coordinator	1	1.00	$ 80,000	$ 80,000
Measurement Coordinator	1	1.00	$ 80,000	$ 80,000
Marketing / Communications Coordinator	1	1.00	$ 74,000	$ 74,000
Leadership Administrator	1	1.00	$ 96,000	$ 96,000
Learning, Leading, Coaching Cross-District Field Specialists	3	3.00	$ 87,000	$ 261,000
Learning, Leading, Coaching Professional Development Coordinator	1	1.00	$ 83,000	$ 83,000
Data Management System Project Leader	1	1.00	$ 81,000	$ 81,000
Data System Specialist	1	1.00	$ 52,000	$ 52,000
Videographers	2	2.00	$ 53,000	$ 106,000
Graphic Designer	1	0.50	$ 58,000	$ 29,000
Professional Development Resource Coordinator	1	1.00	$ 81,000	$ 81,000
LMS Resource Coordinator	1	1.00	$ 81,000	$ 81,000
Peer Evaluators	15	15.00	$ 79,000	$ 1,185,000
Administrative Assistants	2	2.00	$ 36,000	$ 72,000
Data Coordinators	2	2.00	$ 56,000	$ 112,000
Total - Staff	*46*	*45.30*		*$ 3,588,200*
Base Salary Increases				$ 1,930,000
Retention Stipends				$ 2,984,000
Salary Enhancements for Reach Extension Positions				$ 209,461
Performance Based Compensation Stipends for Reach Associates				$ 45,000
Human Resource Certification Recognition Stipends				$ 10,000
Total Performance Based Compensation				*$ 5,178,461*
TOTAL PERSONNEL				**$ 8,766,661**

Project Director and TIF5 Project Leader

Duties: Responsible for leading program staff and partners to successfully complete all goals, objective and activities associated with *REIL-Extend*. Ensures efficient coordination and communication across all program partners. Will ensure successful completion of annual grant requirements, and work collaboratively with REIL Advisory Council, LEAs and grant Partners. (Objective 1.1, 1.2, 1.3, 1.4, 2.1)

Opportunity Culture Project Leader

Duties: Responsible for leading MCESA Opportunity Culture (OC) design team. Ensures effective implementation of OC initiative and adherence to guiding principles. Serves as point of contact for Public Impact and collaborates to monitor project progress. Manages the overall plan for the work. Ensures MCESA team builds capacity to ensure successful gradual release. (Objective 1.1, 1.2, 1.3, 2.1)

Field Specialist

Duties: Responsible for collaboratively building structures to sustain Human Capital Management and Performance Based Evaluation systems within their assigned LEA. Field Specialists will serve as the in-district program coordinators ensuring successful attainment of program goals. (Objective 1.2, 1.3, 1.4, 1.5)

Management Analyst

Duties: Responsible for maintaining detailed project management timelines for all *REIL-Extend* goals and objectives. A member of *REIL-Extend* Program Management Team who designs processes to support project directors and project leads with successful implementing, monitoring and reporting on grant goals, objectives, activities, milestones and performance measures. Performs comprehensive research and analysis on complex program issues and special projects. Prepares comprehensive reports and updates on project implementation and provides recommendations to grant project directors and project leads. (Objective 1.1, 1.2, 1.3, 1.4, 1.5, 2.1)

Financial/Business Systems Specialist

Duties: Responsible for managing the fiscal sustainability of *REIL-Extend* through leading and monitoring of all fiscal planning, transacting and documentation. Will assist in the financial modeling and support for development of financial systems that align with LEAs comprehensive HCMS. (Objective 1.2, 1.4, 1.5)

Assessment Administrator

Duties: Oversees work associated with researching, developing and validating multiple measures of educator effectiveness, including, but not limited to special area subjects. Will coordinate the assessment development activities to ensure all educators have multiple measures for determining effectiveness. Includes development and refreshing of student level assessments. (Objective 1.2, 2.1)

Assessment Coordinator

Duties: Responsible for development of multiple measures of educator effectiveness. Develops assessments for secure and non-secure interim assessments through the facilitation of assessment development committees. (Objective 1.2, 2.1)

Measurement Coordinator

Duties: Responsible for research and validation of multiple measures of educator effectiveness. Determines validity and reliability for secure and non-secure interim assessments through the facilitation of field testing, statistical analysis, and bias review assessment development. (Objective 1.2)

Marketing / Communications Coordinator

Duties: Will oversee implementation of cross-LEA communication plan and provide support for implementation of LEA-specific communication plans. Assist districts with development of targeted marketing campaigns to attracting quality educators that support districts common vision for instructional improvement. (Objective 1.1, 1.2, 1.3, 1.4)

Leadership Administrator

Duties: Responsible for ensuring effective and timely development, delivery and implementation of professional development aligned to Learning, Leading, and Coaching series. (Objective 1.2, 2.1)

Learning, Leading, Coaching Cross-District Field Specialists

Duties: Responsible for increasing and retaining the number of highly effective educators through professional development observation and evaluation aligned to Learning, Leading, and Coaching instruments. Ensuring job-embedded professional development in partner school districts. (Objective 1.2, 1.3, 2.1)

Learning, Leading, Coaching Professional Development Coordinator

Duties: Responsible for developing talent in teaching and leading by delivering professional development in content and pedagogy aligned to the Learning, Leading, and Coaching Observation Instruments. (Objective 1.2, 2.1)

Data Management System Project Leader

Duties: Responsible for developing and implementing a data management system to support all goals, objectives and activities associated with *REIL-Extend*. Collaborates with program partners and Arizona Department of Education. (Objective 1.1, 1.2, 2.1)

Data Systems Specialist

Duties: Responsible for collecting and analyzing student demographics, achievement, and educator evaluation data used to calculate the REIL score through communication and technical cooperation with partner school LEAs and the Arizona Department of Education. (Objective 2.1)

Videographer

Duties: Responsible for supporting the performance-based evaluation system through the technical production and electronic distribution of video aligned to Learning, Leading, and Coaching Observation Instruments. (Objective 1.2, 2.1)

Graphic Designer

Duties: Responsible for creating designs and concepts that will assist district with attracting educators to each LEA. Designs, builds, develops, tests, and maintains content for print, internet and/or intranet using various graphic software applications, programming languages, and other related technology tools. (Objective 1.2, 1.3)

Professional Development Resource Coordinator

Duties: Responsible for creating an online video bank of teaching and leading episodes that represent all elements and levels of the Learning, Leading, and Coaching Observation instruments. Aligning media resources to professional development modules to train teachers, coaches, and administrators on all elements of the Observation Instruments. (Objective 1.2, 2.1)

LMS Resource Coordinator

Duties: Responsible for coordination of course development for the on-line learning management system. Courses delivered via LMS will align directly to observation tools and will assist educators in receiving 'on-demand' professional learning aligned to their personalized Educator Goal Plan. (Objective 1.2)

Peer Evaluator

Duties: Responsible for increasing and retaining the number of effective and highly effective teachers and leaders; provide content-specific feedback to educators based on observations; support school leaders in applying the rubrics to increase accurate evaluation ratings; support Educator Goal Plans; provide as-needed support as part of district and school professional development. Fifteen peer evaluators will be required to support the entire alliance. (Objective 1.2, 1.3, 1.4, 1.5)

Administrative Assistant (Program Director)

Duties: Responsible for assisting in the coordination of duties for *REIL-Extend* Program Director in support of the programs' goals, objectives and activities. Supports the day-to-day operations and maintains effective communication for the Program Director. (Objective 1.2)

Administrative Assistant (Assessment/Leadership)

Duties: Responsible for assisting the Rewarding Excellence in Instruction and Leadership – Extend assessment team in the coordination of developing valid and reliable assessments for secure and non-secure interim assessments through supporting the day-to-day operations and maintaining effective communication. Assist leadership team with development, delivery and implementation of professional development aligned to Learning, Leading, and Coaching series. (Objective 1.2)

Data Coordinator

Duties: The Data Coordinators works collaboratively with Project Directors and staff to ensure successful implementation of the program. Assists with data collection, analysis, and dissemination of communication. Works to design, implement, and support a program strategy that will result in increased student achievement. Gathers and reports on data and provides administrative support functions related to data collection, data integrity, data analysis, and program communication. (Objective 1.2, 1.3, 1.4, 2.1)

Note: all positions are based on a parity analysis and competitive with market ranges in the Phoenix Metropolitan area.

Performance Based Compensation Cost:

Performance based compensation costs are captured in the Personnel section and the Benefits of 20% reside in the Benefit category below per the program instructions.

Base Salary Increases: In FY 2019 (program Year 3), $1,930,000 will be awarded to effective and highly effective teachers, principals, and assistant principals according to LEA-specific salary structure based on effectiveness.

Average Performance-Based Compensation			
	FTE	Total Award	Average
Teacher	1120	$1,830,313	$1,634
Principal/Assistant Principal	61	$99,687	$1,634

Retention Stipends: In FY 2019 (program Year 3), $2,984,000 will be awarded to effective/highly effective teachers, principals, and assistant principals who remain in their LEA. Retention stipend will be differentiated based on school assignment (Spotlight/non-Spotlight).

Retention Stipend Distribution			
School Type	Stipend Amount	FTE	Total $
Non-Spotlight	$3,000	728	$2,184,000
Spotlight	$5,000	160	$800,000
		Total Retention Stipend	$2,984,000

Salary Enhancements for Reach Extension Positions ($209,461) will be provided to support pay supplements awarded to highly effective teachers/school leaders serving in a reach extension position at a Spotlight School (e.g., Multi-Classroom Leader) for assuming additional roles and responsibilities.

Performance Based Compensation Stipends for Reach Associates ($45,000) will be provided to support pay supplements awarded to effective staff serving in a *reach associate* position at a Spotlight School model at a cost of $1,500 per position.

Human Resource Certification Recognition Stipends (10 recipients x $1,000 stipend = $10,000) for eligible Principals and Principal Supervisors, who demonstrate evidence of professional achievement and mastery of content knowledge and leadership skills. See section C.1 in project proposal for additional information.

Fringe Benefits -$2,186,457

$1,150,765 Fringe benefits are calculated at $10,032 per FTE for fixed health/dental benefits plus 19.21% of salaries for variable costs which is the current benefit cost for Maricopa County.

$1,035,692 Fringe Benefits for Performance-Based Compensation variable benefit rate is calculated at 20% of salary expense, based on ASRS, Social Security and Medicare percentages.

Travel - $94,400

Travel	Unit/Quantity	Amount	Total
Annual Travel to TIF Grantee Meetings - Travel and accommodation costs for three staff members to attend an annual two-day conference in Washington, DC @ $1,720/staff member. The $1,720 in travel costs per staff member includes airfare ($750), lodging ($678), and per diem for four days ($242), and ground transportation ($50). (Program Requirement as noted in the grant specifications.)	3	$ 1,720	$ 5,160
Annual Travel to Topic Meetings - Travel and accommodation costs for two staff members to attend an annual two-day conference in Washington, DC @ $1,720/staff member. The $1,720 in travel costs per staff member includes airfare ($750), lodging ($678), and per diem for four days ($242), and ground transportation ($50). (Program Requirement as noted in the grant specifications.)	2	$ 1,720	$ 3,440
Opportunity Culture Site Visit - Travel and accommodation costs for fifteen staff members to attend a two-day site-visit to other schools implementing the Opportunity Culture Initiative in either Charlotte-Mecklenburg School District or Cabarrus County Schools in North Carolina @ $1,720/staff member. The $1,720 in travel costs per staff member includes airfare ($750), lodging ($678), and per diem for four days ($242), and ground transportation ($50). (Objective 1.3)	15	$ 1,720	$ 25,800
Mileage Reimbursements - Mileage Reimbursement for Field Specialists, Peer Evaluators, and other REIL Extend Staff to visit partner school districts across Maricopa County. All mileage costs are reimbursed at the approved Maricopa County rate. (Objective 1.2, 1.3, 1.4)			$ 60,000
Total Travel			**$ 94,400**

Travel expenses are included for required TIF grant responsibilities in the TIF community as well as professional development for informing and engaging key staff and district stakeholders in topics detailed within the project management plan.

Equipment - $0

Supplies - $109,715

Supplies	Unit/Quantity	Amount	Total
Office Setups (Workstation and Technology for REIL Extend Staff) - We anticipate that approximately 23 previously purchased office setups will have reached the end of their useful lives during the third year of the project and will need to be replaced.	23	$ 3,000	$ 69,000
General Office Supplies (office supplies, research materials, education materials)	50	$ 360	$ 18,000
Video Production Supplies Replacement Costs - These supplies are essential for supporting the performance based evaluation system through the technical production and electronic distribution of video aligned to the observation instruments. These supplies include cameras, tripods, mics, SD cards, camera batteries, LED lights, color gels, studio mics, photography light kit, audio mixer, and software licenses.	1	$ 5,000	$ 5,000
Human Centered Design Training Supplies - Workshop supplies including chart paper, post-it notes, journals and manipulatives. Costs are estimated at a cost of $15 per participant for 1,181 participants.	1,181	$ 15	$ 17,715
Total Supplies			**$ 109,715**

Supplies will assist in achieving program and grant goals by providing the necessary materials and supplies to achieve desired results. The cost estimates for the supplies are based on our current annual budget amount per employee for general supplies. (Objective 1.1, 1.2, 1.3, 1.4, 1.5, 2.1)

Contractual - $2,730,000

Contractual	Total
Human Capital Services/HR Certification Training/ Principal Supervisor Training	$ 60,000
Conference Registration and Membership Fees	$ 7,500
Registration Fees for Trainings	$ 7,500
Opportunity Culture (Public Impact)	$ 100,000
Assessment Development	$ 69,000
Data Management System Development	$ 2,000,000
Measurement Services	$ 300,000
Additional Measures for the Performance-Based Evaluation & Support	$ 100,000
Program Evaluation and Data Review Services	$ 70,000
Online Platform to Support Certified Evaluator Training and Assessment	$ 16,000
Total Contractual	**$ 2,730,000**

Cost estimates for the contractual services listed are based on the current market rates for obtaining the services described above. All costs listed above will be charged to the grant. The listed contractual services will facilitate the grant program's success in the implementation and development of creating sustainable performance-based compensation systems, increasing student achievement and additional goals as stated in the program narrative. Named contractors have been procured using appropriate procurement procedures in accordance with 2 C.F.R. 200.317 - 200.326, 34 C.F.R. 75.135 and the Maricopa County Procurement Code.

Human Capital Services/HR Certification Training/ Principal Supervisor Training

Provide MCESA and LEA Staff with the knowledge, skills, and abilities to sustain effective HCMS systems; provide recognition to district and school leaders who acquire HCMS-specific competencies during the grant period (see requirement 1 section I grant proposal) to demonstrate evidence of professional achievement and mastery of content knowledge and leadership skills; Batelle for Kids (a non-profit organization that has extensive experience supporting HCMS work in the field and has developed national HR standards), will provide the Human Resource Education Certification Program. New York City Leadership Academy (a non-profit organization that has extensive experience in training and coaching school leaders) will provide support for principal supervisor training, in alignment with HCMS practices.

Conference Registration and Memberships Fees

Registration and membership fees for *REIL-Extend* Program staff to: attend conferences that align with program goals (e.g., annual ADE-sponsored Leading Change Conference); receive memberships in organizations that align to program goals (e.g., Arizona School Personnel Administrators Association) in order to build, maintain, and enhance knowledge and skills in focus area.

Registration Fees for Training

Registration fees for *REIL-Extend* Program staff to attend content specific training related to: HCMS strategies; implementation of performance-based evaluation and support systems; facilitation/communication related to stakeholder engagement; and strategic compensation. Trainings will support LEA implementation of *REIL-Extend*.

Opportunity Culture (Public Impact)

Lead the OC design and implementation process with district and school design teams. Establish a scope and sequence of support; provide resources and feedback. Assist district leadership in determining the metrics for teacher accountability in the new OC model. Work with the district to determine how best to collect teacher and student data over the course of each year to provide feedback to individual schools on how their OC implementation and outcomes compare with other sites nationally and to assess the overall progress of the initiative toward established goals. Advise district leadership team on refining key systems to support and sustain new school models over time and at scale, beyond the pilot phase, as well as support the teams with HR, budgeting, communications, implementation, etc. as needed.

Assessment Development

Assessments for non-state-tested content areas will be developed for identified tasks in the assessment development process. Tests will be purchased for subject areas that are available in the market to ensure that each teacher's evaluation reflects classroom-level data.

Data Management System Development

Contractual services costs to support the development, integration, operations, and maintenance of various components, including identifying the requirements and building out the HCMS portion of the system. This would include reporting tools (e.g., monitoring assignment of teachers to schools, equitable distribution of teachers, and so on).Costs to support Student-Teacher Link; the Content & Learning Management System; Data Management System Integration and Dashboard Set-up Services to produce a REIL Score; Assessment Delivery Platform for non-tested subject areas; and an Educator Goal Plan System to ensure each educator has a plan for on-going instructional improvement. Each of these systems will be part of the REILize Decision Support System (RDSS).

Measurement Services

Measurement Services include support and ongoing technical assistance related to implementation of the *REIL-Extend* multi-measure system including: refinements to and calculation of the REIL score (overall effectiveness rating); implementation of professional practice and student growth measures in alignment with the State's Measuring Educator Effectiveness Framework; collaboration with the Arizona Department of Education to inform data dashboard and report development and data file transfers/cleansing; support for working teams as delineated in the communication structure; and advisement and support for development and dissemination of educator guidebooks and quick guides. MCESA will contract with Basis Policy Research to conduct the measurement development and calculation of overall effectiveness ratings for educators and coordinate with Arizona Department of Education on data file exchanges and data displays. Please see section A and B of the project proposal for more information on the measurement design and implementation.

Additional Measures for the Performance-Based Evaluation & Support System

Measurement services include support and ongoing technical assistance related to implementation of the *REIL-Extend* Framework for Measuring Educator Effectiveness (e.g., Student surveys, professional responsibilities rubric).Support for working teams as delineated in the communication structure; and advisement and support for development and dissemination of educator guidebooks and quick guides. Additional measure services include support for identification, development, and/or procurement of additional measures to be included in *REIL-Extend's* Performance-Based Evaluation & Support System (e.g., student/staff surveys; professional responsibilities rubric) in order to align with the State's framework requiring: (1) teacher performance and professional practice; and (2) student academic progress.

Program Evaluation and Data Review Services

Program Evaluation and Data Review Services will support successful completion of the management plan including monitoring and reporting on program goals, objectives and

performance measures. These services will include quarterly data review workshops with the *REIL-Extend* management team to facilitate interim feedback processes in order to provide timely feedback to inform necessary program adjustments in order to meet program goals. These services will support the monitoring of LEA progress toward HR alignment and use of HCMS practices as well as the monitoring and reporting on core program components including: inter-rater agreement/reliability; power indicators and early warning indicators resulting from observation data review; educator retention outcomes; and monitoring of performance classification distributions. Additional services include gathering of stakeholder feedback through site visits, focus group interviews, and structured interviews and the resulting reporting including formative as well as summative reports. These services will also include supporting the work of the *REIL-Extend* Advisory Council by sharing ongoing data and results and collecting feedback to inform communication dissemination efforts. MCESA plans to contract with Basis Policy Research to conduct the local evaluation, using both qualitative and quantitative data analysis. MCESA expects to receive ongoing evaluation reports per the *Timeline of Key Evaluation Events* in Section D of the project proposal. Section D also contains more information on the evaluation design and data review services.

Online Platform to Support Certified Evaluator Training and Assessment

Observation Engine, which is a paid service that provides access to video clips and an online testing tool, will be used as a component of Certified Evaluator Training.

Construction - $0

Other Costs - $56,000

Stipend and Substitute Pay for Reach Associates: Off-Contract Pay or Substitute Pay ($26,000) will allow 44 Opportunity Culture Reach Associates at Opportunity Culture Schools to attend four to five days of professional development at an estimated cost of $125 per day. (Objective 1.3)

Stipend and Substitute Pay for Assessment Development: Off-Contract Pay or Substitute Pay ($30,000) will allow teachers to develop assessments at an estimated cost of $125 per day. (Objective 1.2, 2.1)

Year 3 Direct Costs - $13,943,233

Year 3 Indirect Costs - $741,992

Provide Administrative, Fiscal, Technological management and support for the programs including financial reporting, procurement efforts, and Human Resources. Indirect Costs are calculated at the approved Restricted Indirect Cost Rate of 9.6% of eligible direct costs.

Year 3 Total Costs - $14,685,225

Teacher Incentive Fund (TIF) Budget

REIL-Extend Budget Narrative

Year 4

Personnel - $9,076,197

Personnel: The following requested personnel will be hired as employees of the project.	No. of Positions	FTE	Base Salary	Total
Project Director	1	0.80	$ 109,000	$ 87,200
TIF5 Project Leader	1	1.00	$ 106,000	$ 106,000
Opportunity Culture Project Leader	1	1.00	$ 96,000	$ 96,000
Field Specialists	6	6.00	$ 96,000	$ 576,000
Management Analyst	1	1.00	$ 76,000	$ 76,000
Financial Business Systems Specialist	1	1.00	$ 76,000	$ 76,000
Assessment Administrator	1	1.00	$ 98,000	$ 98,000
Assessment Coordinator	1	1.00	$ 80,000	$ 80,000
Measurement Coordinator	1	1.00	$ 80,000	$ 80,000
Marketing / Communications Coordinator	1	1.00	$ 74,000	$ 74,000
Leadership Administrator	1	1.00	$ 96,000	$ 96,000
Learning, Leading, Coaching Cross-District Field Specialists	3	3.00	$ 87,000	$ 261,000
Learning, Leading, Coaching Professional Development Coordinator	1	1.00	$ 83,000	$ 83,000
Data Management System Project Leader	1	1.00	$ 81,000	$ 81,000
Data System Specialist	1	1.00	$ 52,000	$ 52,000
Videographers	2	2.00	$ 53,000	$ 106,000
Graphic Designer	1	0.50	$ 58,000	$ 29,000
Professional Development Resource Coordinator	1	1.00	$ 81,000	$ 81,000
LMS Resource Coordinator	1	1.00	$ 81,000	$ 81,000
Peer Evaluators	15	15.00	$ 79,000	$ 1,185,000
Administrative Assistants	2	2.00	$ 36,000	$ 72,000
Data Coordinators	2	2.00	$ 56,000	$ 112,000
Total - Staff	*46*	*45.30*		*$ 3,588,200*
Base Salary Increases				$ 3,111,000
Retention Stipends				$ 2,256,000
Salary Enhancements for Reach Extension Positions				$ 43,497
Performance Based Compensation Stipends for Reach Associates				$ 67,500
Human Resource Certification Recognition Stipends				$ 10,000
Total Performance Based Compensation				*$ 5,487,997*
TOTAL PERSONNEL				**$ 9,076,197**

Project Director and TIF5 Project Leader

Duties: Responsible for leading program staff and partners to successfully complete all goals, objective and activities associated with *REIL-Extend*. Ensures efficient coordination and communication across all program partners. Will ensure successful completion of annual grant requirements, and work collaboratively with REIL Advisory Council, LEAs and grant Partners. (Objective 1.1, 1.2, 1.3, 1.4, 2.1)

Opportunity Culture Project Leader

Duties: Responsible for leading MCESA Opportunity Culture (OC) design team. Ensures effective implementation of OC initiative and adherence to guiding principles. Serves as point of contact for Public Impact and collaborates to monitor project progress. Manages the overall plan for the work. Ensures MCESA team builds capacity to ensure successful gradual release. (Objective 1.1, 1.2, 1.3, 2.1)

Field Specialist

Duties: Responsible for collaboratively building structures to sustain Human Capital Management and Performance Based Evaluation systems within their assigned LEA. Field Specialists will serve as the in-district program coordinators ensuring successful attainment of program goals. (Objective 1.2, 1.3, 1.4, 1.5)

Management Analyst

Duties: Responsible for maintaining detailed project management timelines for all *REIL-Extend* goals and objectives. A member of *REIL-Extend* Program Management Team who designs processes to support project directors and project leads with successful implementing, monitoring and reporting on grant goals, objectives, activities, milestones and performance measures. Performs comprehensive research and analysis on complex program issues and special projects. Prepares comprehensive reports and updates on project implementation and provides recommendations to grant project directors and project leads. (Objective 1.1, 1.2, 1.3, 1.4, 1.5, 2.1)

Financial/Business Systems Specialist

Duties: Responsible for managing the fiscal sustainability of *REIL-Extend* through leading and monitoring of all fiscal planning, transacting and documentation. Will assist in the financial modeling and support for development of financial systems that align with LEAs comprehensive HCMS. (Objective 1.2, 1.4, 1.5)

Assessment Administrator

Duties: Oversees work associated with researching, developing and validating multiple measures of educator effectiveness, including, but not limited to special area subjects. Will coordinate the assessment development activities to ensure all educators have multiple measures for determining effectiveness. Includes development and refreshing of student level assessments. (Objective 1.2, 2.1)

Assessment Coordinator

Duties: Responsible for development of multiple measures of educator effectiveness. Develops assessments for secure and non-secure interim assessments through the facilitation of assessment development committees. (Objective 1.2, 2.1)

Measurement Coordinator

Duties: Responsible for research and validation of multiple measures of educator effectiveness. Determines validity and reliability for secure and non-secure interim assessments through the facilitation of field testing, statistical analysis, and bias review assessment development. (Objective 1.2)

Marketing / Communications Coordinator

Duties: Will oversee implementation of cross-LEA communication plan and provide support for implementation of LEA-specific communication plans. Assist districts with development of targeted marketing campaigns to attracting quality educators that support districts common vision for instructional improvement. (Objective 1.1, 1.2, 1.3, 1.4)

Leadership Administrator

Duties: Responsible for ensuring effective and timely development, delivery and implementation of professional development aligned to Learning, Leading, and Coaching series. (Objective 1.2, 2.1)

Learning, Leading, Coaching Cross-District Field Specialists

Duties: Responsible for increasing and retaining the number of highly effective educators through professional development observation and evaluation aligned to Learning, Leading, and Coaching instruments. Ensuring job-embedded professional development in partner school districts. (Objective 1.2, 1.3, 2.1)

Learning, Leading, Coaching Professional Development Coordinator

Duties: Responsible for developing talent in teaching and leading by delivering professional development in content and pedagogy aligned to the Learning, Leading, and Coaching Observation Instruments. (Objective 1.2, 2.1)

Data Management System Project Leader

Duties: Responsible for developing and implementing a data management system to support all goals, objectives and activities associated with *REIL-Extend*. Collaborates with program partners and Arizona Department of Education. (Objective 1.1, 1.2, 2.1)

Data Systems Specialist

Duties: Responsible for collecting and analyzing student demographics, achievement, and educator evaluation data used to calculate the REIL score through communication and technical cooperation with partner school LEAs and the Arizona Department of Education. (Objective 2.1)

Videographer

Duties: Responsible for supporting the performance-based evaluation system through the technical production and electronic distribution of video aligned to Learning, Leading, and Coaching Observation Instruments. (Objective 1.2, 2.1)

Graphic Designer

Duties: Responsible for creating designs and concepts that will assist district with attracting educators to each LEA. Designs, builds, develops, tests, and maintains content for print, internet and/or intranet using various graphic software applications, programming languages, and other related technology tools. (Objective 1.2, 1.3)

Professional Development Resource Coordinator

Duties: Responsible for creating an online video bank of teaching and leading episodes that represent all elements and levels of the Learning, Leading, and Coaching Observation instruments. Aligning media resources to professional development modules to train teachers, coaches, and administrators on all elements of the Observation Instruments. (Objective 1.2, 2.1)

LMS Resource Coordinator

Duties: Responsible for coordination of course development for the on-line learning management system. Courses delivered via LMS will align directly to observation tools and will assist educators in receiving 'on-demand' professional learning aligned to their personalized Educator Goal Plan. (Objective 1.2)

Peer Evaluator

Duties: Responsible for increasing and retaining the number of effective and highly effective teachers and leaders; provide content-specific feedback to educators based on observations; support school leaders in applying the rubrics to increase accurate evaluation ratings; support Educator Goal Plans; provide as-needed support as part of district and school professional development. Fifteen peer evaluators will be required to support the entire alliance. (Objective 1.2, 1.3, 1.4, 1.5)

Administrative Assistant (Program Director)

Duties: Responsible for assisting in the coordination of duties for *REIL-Extend* Program Director in support of the programs' goals, objectives and activities. Supports the day-to-day operations and maintains effective communication for the Program Director. (Objective 1.2)

Administrative Assistant (Assessment/Leadership)

Duties: Responsible for assisting the Rewarding Excellence in Instruction and Leadership – Extend assessment team in the coordination of developing valid and reliable assessments for secure and non-secure interim assessments through supporting the day-to-day operations and maintaining effective communication. Assist leadership team with development, delivery and implementation of professional development aligned to Learning, Leading, and Coaching series. (Objective 1.2)

Data Coordinator

Duties: The Data Coordinators works collaboratively with Project Directors and staff to ensure successful implementation of the program. Assists with data collection, analysis, and dissemination of communication. Works to design, implement, and support a program strategy that will result in increased student achievement. Gathers and reports on data and provides administrative support functions related to data collection, data integrity, data analysis, and program communication. (Objective 1.2, 1.3, 1.4, 2.1)

Note: all positions are based on a parity analysis and competitive with market ranges in the Phoenix Metropolitan area.

Performance Based Compensation Cost:

Performance based compensation costs are captured in the Personnel section and the Benefits of 20% reside in the Benefit category below per the program instructions.

Base Salary Increases: In FY 2020 (program Year 4), $3,111,000 will be awarded to effective and highly effective teachers, principals, and assistant principals according to LEA-specific salary structure based on effectiveness.

Average Performance-Based Compensation			
	FTE	Total Award	Average
Teacher	1120	$2,950,313	$2,634
Principal/Assistant Principal	61	$160,687	$2,634

Retention Stipends: In FY 2020 (program Year 4), $2,256,000 will be awarded to effective/highly effective teachers, principals, and assistant principals who remain in their LEA. Retention stipend will be differentiated based on school assignment (Spotlight/non-Spotlight).

Retention Stipend Distribution			
School Type	Stipend Amount	FTE	Total $
Non-Spotlight	$2,000	568	$1,136,000
Spotlight	$3,500	320	$1,120,000
		Total Retention Stipend	$2,256,000

Salary Enhancements for Reach Extension Positions ($43,497) will be provided to support pay supplements awarded to highly effective teachers/school leaders serving in a reach extension position at a Spotlight School (e.g., Multi-Classroom Leader) for assuming additional roles and responsibilities.

Performance Based Compensation Stipends for Reach Associates ($67,500) will be provided to support pay supplements awarded to effective staff serving in a reach associate position at a Spotlight School model at a cost of $1,500 per position.

Human Resource Certification Recognition Stipends (10 recipients x $1,000 stipend = $10,000) for eligible Principals and Principal Supervisors, who demonstrate evidence of professional achievement and mastery of content knowledge and leadership skills. See section C.1 in project proposal for additional information.

Fringe Benefits -$2,248,364

$1,150,765 Fringe benefits are calculated at $10,032 per FTE for fixed health/dental benefits plus 19.21% of salaries for variable costs which is the current benefit cost for Maricopa County.

$1,097,599 Fringe Benefits for Performance-Based Compensation variable benefit rate is calculated at 20% of salary expense, based on ASRS, Social Security and Medicare percentages.

Travel - $68,600

Travel	Unit/Quantity	Amount	Total
Annual Travel to TIF Grantee Meetings - Travel and accommodation costs for three staff members to attend an annual two-day conference in Washington, DC @ $1,720/staff member. The $1,720 in travel costs per staff member includes airfare ($750), lodging ($678), and per diem for four days ($242), and ground transportation ($50). (Program Requirement as noted in the grant specifications.)	3	$ 1,720	$ 5,160
Annual Travel to Topic Meetings - Travel and accommodation costs for two staff members to attend an annual two-day conference in Washington, DC @ $1,720/staff member. The $1,720 in travel costs per staff member includes airfare ($750), lodging ($678), and per diem for four days ($242), and ground transportation ($50). (Program Requirement as noted in the grant specifications.)	2	$ 1,720	$ 3,440
Mileage Reimbursements - Mileage Reimbursement for Field Specialists, Peer Evaluators, and other REIL Extend Staff to visit partner school districts across Maricopa County. All mileage costs are reimbursed at the approved Maricopa County rate. (Objective 1.2, 1.3, 1.4)			$ 60,000
Total Travel			**$ 68,600**

Travel expenses are included for required TIF grant responsibilities in the TIF community as well as professional development for informing and engaging key staff and district stakeholders in topics detailed within the project management plan.

Equipment - $0

Supplies - $109,715

Supplies	Unit/Quantity	Amount	Total
Office Setups (Workstation and Technology for REIL Extend Staff) - We anticipate that aproximately 23 previosuly purchased office setups will have reached the end of their useful lives during the fourth year of the project and will need to be replaced.	23	$ 3,000	$ 69,000
General Office Supplies (office supplies, research materials, education materials)	50	$ 360	$ 18,000
Video Production Supplies Replacement Costs - These supplies are essential for supporting the performance based evaluation system through the technical production and electronic distribution of video aligned to the observation instruments. These supplies include cameras, tripods, mics, SD cards, camera batteries, LED lights, color gels, studio mics, photography light kit, audio mixer, and software licenses.	1	$ 5,000	$ 5,000
Human Centered Design Training Supplies - Workshop supplies including chart paper, post-it notes, journals and manipulatives. Costs are estimated at a cost of $15 per participant for 1,181 participants.	1,181	$ 15	$ 17,715
Total Supplies			**$ 109,715**

Supplies will assist in achieving program and grant goals by providing the necessary materials and supplies to achieve desired results. The cost estimates for the supplies are based on our current annual budget amount per employee for general supplies. (Objective 1.1, 1.2, 1.3, 1.4, 1.5, 2.1)

Contractual - $2,626,000

Contractual	Total
Human Capital Services/HR Certification Training/ Principal Supervisor Training	$ 60,000
Conference Registration and Membership Fees	$ 7,500
Registration Fees for Trainings	$ 7,500
Opportunity Culture (Public Impact)	$ 50,000
Assessment Development	$ 15,000
Data Management System Development	$ 2,000,000
Measurement Services	$ 300,000
Additional Measures for the Performance-Based Evaluation & Support	$ 100,000
Program Evaluation and Data Review Services	$ 70,000
Online Platform to Support Certified Evaluator Training and Assessment	$ 16,000
Total Contractual	**$ 2,626,000**

Cost estimates for the contractual services listed are based on the current market rates for obtaining the services described above. All costs listed above will be charged to the grant. The listed contractual services will facilitate the grant program's success in the implementation and development of creating sustainable performance-based compensation systems, increasing student achievement and additional goals as stated in the program narrative. Named contractors have been procured using appropriate procurement procedures in accordance with 2 C.F.R. 200.317 - 200.326, 34 C.F.R. 75.135 and the Maricopa County Procurement Code.

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Provide MCESA and LEA Staff with the knowledge, skills, and abilities to sustain effective HCMS systems; provide recognition to district and school leaders who acquire HCMS-specific competencies during the grant period (see requirement 1 section I grant proposal) to demonstrate evidence of professional achievement and mastery of content knowledge and leadership skills; Batelle for Kids (a non-profit organization that has extensive experience supporting HCMS work in the field and has developed national HR standards), will provide the Human Resource Education Certification Program. New York City Leadership Academy (a non-profit organization that has extensive experience in training and coaching school leaders) will provide support for principal supervisor training, in alignment with HCMS practices.

Conference Registration and Memberships Fees

Registration and membership fees for *REIL-Extend* Program staff to: attend conferences that align with program goals (e.g., annual ADE-sponsored Leading Change Conference); receive memberships in organizations that align to program goals (e.g., Arizona School Personnel Administrators Association) in order to build, maintain, and enhance knowledge and skills in focus area.

Registration Fees for Training

Registration fees for *REIL-Extend* Program staff to attend content specific training related to: HCMS strategies; implementation of performance-based evaluation and support systems; facilitation/communication related to stakeholder engagement; and strategic compensation. Trainings will support LEA implementation of *REIL-Extend*.

Opportunity Culture (Public Impact)

REIL-Extend will contract with Public Impact who will provide technical assistance serve in a limited technical assistance. Troubleshoot design or implementation issues, collect and analyze data that can serve as proof points, and document and publish results and case studies, as applicable.

Assessment Development

Assessments for non-state-tested content areas will be developed for identified tasks in the assessment development process. Tests will be purchased for subject areas that are available in the market to ensure that each teacher's evaluation reflects classroom-level data. Stipends will be used to pay teachers for after-hour work to participate in Career Pathways Academy professional development.

Data Management System Development

Contractual services costs to support the development, integration, operations, and maintenance of various components, including identifying the requirements and building out the HCMS portion of the system. This would include reporting tools (e.g., monitoring assignment of teachers to schools, equitable distribution of teachers, and so on).Costs to support Student-Teacher Link; the Content & Learning Management System; Data Management System Integration and Dashboard Set-up Services to produce a REIL Score; Assessment Delivery Platform for non-tested subject areas; and an Educator Goal Plan System to ensure each educator has a plan for on-going instructional improvement. Each of these systems will be part of the REILize Decision Support System (RDSS).

Measurement Services

Measurement Services include support and ongoing technical assistance related to implementation of the *REIL-Extend* multi-measure system including: refinements to and calculation of the REIL score (overall effectiveness rating); implementation of professional practice and student growth measures in alignment with the State's Measuring Educator Effectiveness Framework; collaboration with the Arizona Department of Education to inform data dashboard and report development and data file transfers/cleansing; support for working teams as delineated in the communication structure; and advisement and support for development and dissemination of educator guidebooks and quick guides. MCESA will contract with Basis Policy Research to conduct the measurement development and calculation of overall effectiveness ratings for educators and coordinate with Arizona Department of Education on data file exchanges and data displays. Please see section A and B of the project proposal for more information on the measurement design and implementation.

Additional Measures for the Performance-Based Evaluation & Support System

Measurement services include support and ongoing technical assistance related to implementation of the *REIL-Extend* Framework for Measuring Educator Effectiveness (e.g., Student surveys, professional responsibilities rubric).Support for working teams as delineated in the communication structure; and advisement and support for development and dissemination of educator guidebooks and quick guides. Additional measure services include support for identification, development, and/or procurement of additional measures to be included in *REIL-Extend's* Performance-Based Evaluation & Support System (e.g., student/staff surveys; professional responsibilities rubric) in order to align with the State's framework requiring: (1) teacher performance and professional practice; and (2) student academic progress.

Program Evaluation and Data Review Services

Program Evaluation and Data Review Services will support successful completion of the management plan including monitoring and reporting on program goals, objectives and performance measures. These services will include quarterly data review workshops with the *REIL-Extend* management team to facilitate interim feedback processes in order to provide timely feedback to inform necessary program adjustments in order to meet program goals. These services will support the monitoring of LEA progress toward HR alignment and use of HCMS practices as well as the monitoring and reporting on core program components including: inter-rater agreement/reliability; power indicators and early warning indicators resulting from observation data review; educator retention outcomes; and monitoring of performance classification distributions. Additional services include gathering of stakeholder feedback through site visits, focus group interviews, and structured interviews and the resulting reporting including formative as well as summative reports. These services will also include supporting the work of the *REIL-Extend* Advisory Council by sharing ongoing data and results and collecting feedback to inform communication dissemination efforts. MCESA plans to contract with Basis Policy Research to conduct the local evaluation, using both qualitative and quantitative data analysis. MCESA expects to receive ongoing evaluation reports per the *Timeline of Key Evaluation Events* in Section D of the project proposal. Section D also contains more information on the evaluation design and data review services.

Online Platform to Support Certified Evaluator Training and Assessment

Observation Engine, which is a paid service that provides access to video clips and an online testing tool, will be used as a component of Certified Evaluator Training.

Construction - $0

Other Costs - $16,000

Stipend and Substitute Pay for Reach Associates: Off-Contract Pay or Substitute Pay ($16,000) will allow 28 Opportunity Culture Reach Associates at Opportunity Culture Schools to attend four to five days of professional development at an estimated cost of $125 per day. (Objective 1.3)

Year 4 Direct Costs - $14,144,876

Year 4 Indirect Costs - $725,691

Provide Administrative, Fiscal, Technological management and support for the programs including financial reporting, procurement efforts, and Human Resources. Indirect Costs are calculated at the approved Restricted Indirect Cost Rate of 9.6% of eligible direct costs.

Year 4 Total Costs - $14,870,567

Teacher Incentive Fund (TIF) Budget

REIL-Extend Budget Narrative

Year 5

Personnel - $8,679,700

Personnel: The following requested personnel will be hired as employees of the project.	No. of Positions	FTE	Base Salary	Total
Project Director	1	0.80	$ 109,000	$ 87,200
TIF5 Project Leader	1	1.00	$ 106,000	$ 106,000
Opportunity Culture Project Leader	1	0.75	$ 96,000	$ 72,000
Field Specialists	6	6.00	$ 96,000	$ 576,000
Management Analyst	1	0.75	$ 76,000	$ 57,000
Financial Business Systems Specialist	1	1.00	$ 76,000	$ 76,000
Assessment Administrator	1	0.75	$ 98,000	$ 73,500
Assessment Coordinator	1	0.75	$ 80,000	$ 60,000
Measurement Coordinator	1	0.75	$ 80,000	$ 60,000
Marketing / Communications Coordinator	1	0.75	$ 74,000	$ 55,500
Leadership Administrator	1	0.75	$ 96,000	$ 72,000
Learning, Leading, Coaching Cross-District Field Specialists	3	3.00	$ 87,000	$ 261,000
Learning, Leading, Coaching Professional Development Coordinator	1	0.75	$ 83,000	$ 62,250
Data Management System Project Leader	1	0.75	$ 81,000	$ 60,750
Data System Specialist	1	0.75	$ 52,000	$ 39,000
Videographers	2	1.50	$ 53,000	$ 79,500
Graphic Designer	1	0.38	$ 58,000	$ 21,750
Professional Development Resource Coordinator	1	0.75	$ 81,000	$ 60,750
LMS Resource Coordinator	1	0.75	$ 81,000	$ 60,750
Peer Evaluators	15	11.25	$ 79,000	$ 888,750
Administrative Assistants	2	2.00	$ 36,000	$ 72,000
Data Coordinators	2	1.75	$ 56,000	$ 98,000
Total - Staff	*46*	*37.68*		*$ 2,999,700*
Base Salary Increases				$ 4,292,000
Retention Stipends				$ 1,288,000
Salary Enhancements for Reach Extension Positions				$ -
Human Resource Certification Recognition Stipends				$ 10,000
Total Performance Based Compensation				*$ 5,680,000*
TOTAL PERSONNEL				**$ 8,679,700**

During year 5 of the REIL-Extend program many of the staff positions that are included in this narrative are only budgeted through June of 2021.

Project Director and TIF5 Project Leader

Duties: Responsible for leading program staff and partners to successfully complete all goals, objective and activities associated with *REIL-Extend*. Ensures efficient coordination and communication across all program partners. Will ensure successful completion of annual grant requirements, and work collaboratively with REIL Advisory Council, LEAs and grant Partners. (Objective 1.1, 1.2, 1.3, 1.4, 2.1)

Opportunity Culture Project Leader

Duties: Responsible for leading MCESA Opportunity Culture (OC) design team. Ensures effective implementation of OC initiative and adherence to guiding principles. Serves as point of contact for Public Impact and collaborates to monitor project progress. Manages the overall plan for the work. Ensures MCESA team builds capacity to ensure successful gradual release. (Objective 1.1, 1.2, 1.3, 2.1)

Field Specialist

Duties: Responsible for collaboratively building structures to sustain Human Capital Management and Performance Based Evaluation systems within their assigned LEA. Field Specialists will serve as the in-district program coordinators ensuring successful attainment of program goals. (Objective 1.2, 1.3, 1.4, 1.5)

Management Analyst

Duties: Responsible for maintaining detailed project management timelines for all *REIL-Extend* goals and objectives. A member of *REIL-Extend* Program Management Team who designs processes to support project directors and project leads with successful implementing, monitoring and reporting on grant goals, objectives, activities, milestones and performance measures. Performs comprehensive research and analysis on complex program issues and special projects. Prepares comprehensive reports and updates on project implementation and provides recommendations to grant project directors and project leads. (Objective 1.1, 1.2, 1.3, 1.4, 1.5, 2.1)

Financial/Business Systems Specialist

Duties: Responsible for managing the fiscal sustainability of *REIL-Extend* through leading and monitoring of all fiscal planning, transacting and documentation. Will assist in the financial modeling and support for development of financial systems that align with LEAs comprehensive HCMS. (Objective 1.2, 1.4, 1.5)

Assessment Administrator

Duties: Oversees work associated with researching, developing and validating multiple measures of educator effectiveness, including, but not limited to special area subjects. Will coordinate the assessment development activities to ensure all educators have multiple measures for

determining effectiveness. Includes development and refreshing of student level assessments. (Objective 1.2, 2.1)

Assessment Coordinator

Duties: Responsible for development of multiple measures of educator effectiveness. Develops assessments for secure and non-secure interim assessments through the facilitation of assessment development committees. (Objective 1.2, 2.1)

Measurement Coordinator

Duties: Responsible for research and validation of multiple measures of educator effectiveness. Determines validity and reliability for secure and non-secure interim assessments through the facilitation of field testing, statistical analysis, and bias review assessment development. (Objective 1.2)

Marketing / Communications Coordinator

Duties: Will oversee implementation of cross-LEA communication plan and provide support for implementation of LEA-specific communication plans. Assist districts with development of targeted marketing campaigns to attracting quality educators that support districts common vision for instructional improvement. (Objective 1.1, 1.2, 1.3, 1.4)

Leadership Administrator

Duties: Responsible for ensuring effective and timely development, delivery and implementation of professional development aligned to Learning, Leading, and Coaching series. (Objective 1.2, 2.1)

Learning, Leading, Coaching Cross-District Field Specialists

Duties: Responsible for increasing and retaining the number of highly effective educators through professional development observation and evaluation aligned to Learning, Leading, and Coaching instruments. Ensuring job-embedded professional development in partner school districts. (Objective 1.2, 1.3, 2.1)

Learning, Leading, Coaching Professional Development Coordinator

Duties: Responsible for developing talent in teaching and leading by delivering professional development in content and pedagogy aligned to the Learning, Leading, and Coaching Observation Instruments. (Objective 1.2, 2.1)

Data Management System Project Leader

Duties: Responsible for developing and implementing a data management system to support all goals, objectives and activities associated with *REIL-Extend*. Collaborates with program partners and Arizona Department of Education. (Objective 1.1, 1.2, 2.1)

Data Systems Specialist

Duties: Responsible for collecting and analyzing student demographics, achievement, and educator evaluation data used to calculate the REIL score through communication and technical cooperation with partner school LEAs and the Arizona Department of Education. (Objective 2.1)

Videographer

Duties: Responsible for supporting the performance-based evaluation system through the technical production and electronic distribution of video aligned to Learning, Leading, and Coaching Observation Instruments. (Objective 1.2, 2.1)

Graphic Designer

Duties: Responsible for creating designs and concepts that will assist district with attracting educators to each LEA. Designs, builds, develops, tests, and maintains content for print, internet and/or intranet using various graphic software applications, programming languages, and other related technology tools. (Objective 1.2, 1.3)

Professional Development Resource Coordinator

Duties: Responsible for creating an online video bank of teaching and leading episodes that represent all elements and levels of the Learning, Leading, and Coaching Observation instruments. Aligning media resources to professional development modules to train teachers, coaches, and administrators on all elements of the Observation Instruments. (Objective 1.2, 2.1)

LMS Resource Coordinator

Duties: Responsible for coordination of course development for the on-line learning management system. Courses delivered via LMS will align directly to observation tools and will assist educators in receiving 'on-demand' professional learning aligned to their personalized Educator Goal Plan. (Objective 1.2)

Peer Evaluator

Duties: Responsible for increasing and retaining the number of effective and highly effective teachers and leaders; provide content-specific feedback to educators based on observations; support school leaders in applying the rubrics to increase accurate evaluation ratings; support Educator Goal Plans; provide as-needed support as part of district and school professional development. Fifteen peer evaluators will be required to support the entire alliance. (Objective 1.2, 1.3, 1.4, 1.5)

Administrative Assistant (Program Director)

Duties: Responsible for assisting in the coordination of duties for *REIL-Extend* Program Director in support of the programs' goals, objectives and activities. Supports the day-to-day operations and maintains effective communication for the Program Director. (Objective 1.2)

Administrative Assistant (Assessment/Leadership)

Duties: Responsible for assisting the Rewarding Excellence in Instruction and Leadership – Extend assessment team in the coordination of developing valid and reliable assessments for secure and non-secure interim assessments through supporting the day-to-day operations and maintaining effective communication. Assist leadership team with development, delivery and implementation of professional development aligned to Learning, Leading, and Coaching series. (Objective 1.2)

Data Coordinator

Duties: The Data Coordinators works collaboratively with Project Directors and staff to ensure successful implementation of the program. Assists with data collection, analysis, and dissemination of communication. Works to design, implement, and support a program strategy that will result in increased student achievement. Gathers and reports on data and provides administrative support functions related to data collection, data integrity, data analysis, and program communication. (Objective 1.2, 1.3, 1.4, 2.1)

Note: all positions are based on a parity analysis and competitive with market ranges in the Phoenix Metropolitan area.

Performance Based Compensation Cost:

Performance based compensation costs are captured in the Personnel section and the Benefits of 20% reside in the Benefit category below per the program instructions.

> **Base Salary Increases**: In FY 2021 (program Year 5), $4,292,000 will be awarded to effective and highly effective teachers, principals, and assistant principals according to LEA-specific salary structure based on effectiveness.

Average Performance-Based Compensation			
	FTE	Total Award	Average
Teacher	1120	$4,070,313	$3,634
Principal/Assistant Principal	61	$221,687	$3,634

Retention Stipends: In FY 2021 (program Year 5), $1,288,000 In FY 2019 (program Year 3), $2,984,000 will be awarded to effective/highly effective teachers, principals, and assistant principals who remain in their LEA. Retention stipend will be differentiated based on school assignment (Spotlight/non-Spotlight).

Retention Stipend Distribution			
School Type	Stipend Amount	FTE	Total $
Non-Spotlight	$1,000	488	$488,000
Spotlight	$2,000	400	$,800,000
		Total Retention Stipend	$1,288,000

Performance Based Compensation Stipends for Reach Associates ($90,000) will be provided to support pay supplements awarded to effective staff serving in a *reach associate* position at a Spotlight School model at a cost of $1,500 per position.

Human Resource Certification Recognition Stipends (10 recipients x $1,000 stipend = $10,000) for eligible Principals and Principal Supervisors, who demonstrate evidence of professional achievement and mastery of content knowledge and leadership skills. See section C.1 in project proposal for additional information.

Fringe Benefits -$2,095,966

$959,966 Fringe benefits are calculated at $10,032 per FTE for fixed health/dental benefits plus 19.21% of salaries for variable costs which is the current benefit cost for Maricopa County.

$1,136,000 Fringe Benefits for Performance-Based Compensation variable benefit rate is calculated at 20% of salary expense, based on ASRS, Social Security and Medicare percentages.

Travel - $68,600

Travel	Unit/Quantity	Amount	Total
Annual Travel to TIF Grantee Meetings - Travel and accommodation costs for three staff members to attend an annual two-day conference in Washington, DC @ $1,720/staff member. The $1,720 in travel costs per staff member includes airfare ($750), lodging ($678), and per diem for four days ($242), and ground transportation ($50). (Program Requirement as noted in the grant specifications.)	3	$ 1,720	$ 5,160
Annual Travel to Topic Meetings - Travel and accommodation costs for two staff members to attend an annual two-day conference in Washington, DC @ $1,720/staff member. The $1,720 in travel costs per staff member includes airfare ($750), lodging ($678), and per diem for four days ($242), and ground transportation ($50). (Program Requirement as noted in the grant specifications.)	2	$ 1,720	$ 3,440
Mileage Reimbursements - Mileage Reimbursement for Field Specialists, Peer Evaluators, and other REIL Extend Staff to visit partner school districts across Maricopa County. All mileage costs are reimbursed at the approved Maricopa County rate. (Objective 1.2, 1.3, 1.4)			$ 60,000
Total Travel			**$ 68,600**

Travel expenses are included for required TIF grant responsibilities in the TIF community as well as professional development for informing and engaging key staff and district stakeholders in topics detailed within the project management plan.

Equipment - $0

Supplies - $23,000

Supplies	Unit/Quantity	Amount	Total
General Office Supplies (office supplies, research materials, education materials)	50	$ 360	$ 18,000
Video Production Supplies Replacement Costs - These supplies are essential for supporting the performance based evaluation system through the technical production and electronic distribution of video aligned to the observation instruments. These supplies include cameras, tripods, mics, SD cards, camera batteries, LED lights, color gels, studio mics, photography light kit, audio mixer, and software licenses.	1	$ 5,000	$ 5,000
Total Supplies			**$ 23,000**

Supplies will assist in achieving program and grant goals by providing the necessary materials and supplies to achieve desired results. The cost estimates for the supplies are based on our current annual budget amount per employee for general supplies. (Objective 1.1, 1.2, 1.3, 1.4, 1.5, 2.1)

Contractual - $2,130,000

Contractual	Total
Human Capital Services/HR Certification Training/ Principal Supervisor Training	$ 60,000
Conference Registration and Membership Fees	$ 7,500
Registration Fees for Trainings	$ 7,500
Opportunity Culture (Public Impact)	$ 50,000
Assessment Development	$ 69,000
Data Management System Development	$ 1,500,000
Measurement Services	$ 250,000
Additional Measures for the Performance-Based Evaluation & Support	$ 100,000
Program Evaluation and Data Review Services	$ 70,000
Online Platform to Support Certified Evaluator Training and Assessment	$ 16,000
Total Contractual	**$ 2,130,000**

Cost estimates for the contractual services listed are based on the current market rates for obtaining the services described above. All costs listed above will be charged to the grant. The listed contractual services will facilitate the grant program's success in the implementation and development of creating sustainable performance-based compensation systems, increasing student achievement and additional goals as stated in the program narrative. Named contractors have been procured using appropriate procurement procedures in accordance with 2 C.F.R. 200.317 - 200.326, 34 C.F.R. 75.135 and the Maricopa County Procurement Code.

Human Capital Services/HR Certification Training/ Principal Supervisor Training

Provide MCESA and LEA Staff with the knowledge, skills, and abilities to sustain effective HCMS systems; provide recognition to district and school leaders who acquire HCMS-specific competencies during the grant period (see requirement 1 section I grant proposal) to demonstrate evidence of professional achievement and mastery of content knowledge and leadership skills; Batelle for Kids (a non-profit organization that has extensive experience supporting HCMS work in the field and has developed national HR standards), will provide the Human Resource Education Certification Program. New York City Leadership Academy (a non-profit organization that has extensive experience in training and coaching school leaders) will provide support for principal supervisor training, in alignment with HCMS practices.

Conference Registration and Memberships Fees

Registration and membership fees for *REIL-Extend* Program staff to: attend conferences that align with program goals (e.g., annual ADE-sponsored Leading Change Conference); receive memberships in organizations that align to program goals (e.g., Arizona School Personnel Administrators Association) in order to build, maintain, and enhance knowledge and skills in focus area.

Registration Fees for Training

Registration fees for *REIL-Extend* Program staff to attend content specific training related to: HCMS strategies; implementation of performance-based evaluation and support systems; facilitation/communication related to stakeholder engagement; and strategic compensation. Trainings will support LEA implementation of *REIL-Extend*.

Opportunity Culture (Public Impact)

REIL-Extend will contract with Public Impact who will provide technical assistance serve in a limited technical assistance. Troubleshoot design or implementation issues, collect and analyze data that can serve as proof points, and document and publish results and case studies, as applicable.

Assessment Development

Assessments for non-state-tested content areas will be developed for identified tasks in the assessment development process. Tests will be purchased for subject areas that are available in the market to ensure that each teacher's evaluation reflects classroom-level data. Stipends will be used to pay teachers for after-hour work to participate in Career Pathways Academy professional development.

Data Management System Development

Contractual services costs to support the development, integration, operations, and maintenance of various components, including identifying the requirements and building out the HCMS portion of the system. This would include reporting tools (e.g., monitoring assignment of teachers to schools, equitable distribution of teachers, and so on).Costs to support Student-Teacher Link; the Content & Learning Management System; Data Management System Integration and Dashboard Set-up Services to produce a REIL Score; Assessment Delivery Platform for non-tested subject areas; and an Educator Goal Plan System to ensure each educator has a plan for on-going instructional improvement. Each of these systems will be part of the REILize Decision Support System (RDSS).

Measurement Services

Measurement Services include support and ongoing technical assistance related to implementation of the *REIL-Extend* multi-measure system including: refinements to and calculation of the REIL score (overall effectiveness rating); implementation of professional practice and student growth measures in alignment with the State's Measuring Educator Effectiveness Framework; collaboration with the Arizona Department of Education to inform data dashboard and report development and data file transfers/cleansing; support for working teams as delineated in the communication structure; and advisement and support for development and dissemination of educator guidebooks and quick guides. MCESA will contract with Basis Policy Research to conduct the measurement development and calculation of overall effectiveness ratings for educators and coordinate with Arizona Department of Education on data file exchanges and data displays. Please see section A and B of the project proposal for more information on the measurement design and implementation.

Additional Measures for the Performance-Based Evaluation & Support System

Measurement services include support and ongoing technical assistance related to implementation of the *REIL-Extend* Framework for Measuring Educator Effectiveness (e.g., Student surveys, professional responsibilities rubric).Support for working teams as delineated in the communication structure; and advisement and support for development and dissemination of educator guidebooks and quick guides. Additional measure services include support for identification, development, and/or procurement of additional measures to be included in *REIL-Extend's* Performance-Based Evaluation & Support System (e.g., student/staff surveys; professional responsibilities rubric) in order to align with the State's framework requiring: (1) teacher performance and professional practice; and (2) student academic progress.

Program Evaluation and Data Review Services

Program Evaluation and Data Review Services will support successful completion of the management plan including monitoring and reporting on program goals, objectives and

performance measures. These services will include quarterly data review workshops with the *REIL-Extend* management team to facilitate interim feedback processes in order to provide timely feedback to inform necessary program adjustments in order to meet program goals. These services will support the monitoring of LEA progress toward HR alignment and use of HCMS practices as well as the monitoring and reporting on core program components including: inter-rater agreement/reliability; power indicators and early warning indicators resulting from observation data review; educator retention outcomes; and monitoring of performance classification distributions. Additional services include gathering of stakeholder feedback through site visits, focus group interviews, and structured interviews and the resulting reporting including formative as well as summative reports. These services will also include supporting the work of the *REIL-Extend* Advisory Council by sharing ongoing data and results and collecting feedback to inform communication dissemination efforts. MCESA plans to contract with Basis Policy Research to conduct the local evaluation, using both qualitative and quantitative data analysis. MCESA expects to receive ongoing evaluation reports per the *Timeline of Key Evaluation Events* in Section D of the project proposal. Section D also contains more information on the evaluation design and data review services.

Online Platform to Support Certified Evaluator Training and Assessment

Observation Engine, which is a paid service that provides access to video clips and an online testing tool, will be used as a component of Certified Evaluator Training.

Construction - $0

Other Costs - $40,000

Stipend and Substitute Pay for Reach Associates: Off-Contract Pay or Substitute Pay ($10,000) will allow 16 Opportunity Culture Reach Associates at Opportunity Culture Schools to attend five days of professional development at an estimated cost of $125 per day. (Objective 1.3)

Stipend and Substitute Pay for Assessment Development: Off-Contract Pay or Substitute Pay ($30,000) will allow teachers to develop assessments at an estimated cost of $125 per day. (Objective 1.2, 2.1)

<u>Year 5 Direct Costs</u> - $13,037,266

<u>Year 5 Indirect Costs</u> - $597,242

Provide Administrative, Fiscal, Technological management and support for the programs including financial reporting, procurement efforts, and Human Resources. Indirect Costs are calculated at the approved Restricted Indirect Cost Rate of 9.6% of eligible direct costs.

<u>Year 5 Total Costs</u> - $13,634,508

TOTAL PROJECT COST - $59,998,629

OMB Number: 1894-0007
Expiration Date: 08/31/2017

U.S. DEPARTMENT OF EDUCATION
SUPPLEMENTAL INFORMATION
FOR THE SF-424

1. Project Director:

Prefix:	First Name:	Middle Name:	Last Name:	Suffix:
Dr.	Lori		Renfro	

Address:

Street1: 4041 N Central Ave
Street2: Suite 1200
City: Phoenix
County:
State: AZ: Arizona
Zip Code: 85012
Country: USA: UNITED STATES

Phone Number (give area code)

Fax Number (give area code)

Email Address:

2. Novice Applicant:

Are you a novice applicant as defined in the regulations in 34 CFR 75.225 (and included in the definitions page in the attached instructions)?

☐ Yes ☐ No ☒ Not applicable to this program

3. Human Subjects Research:

a. Are any research activities involving human subjects planned at any time during the proposed Project Period?

☐ Yes ☒ No

b. Are ALL the research activities proposed designated to be exempt from the regulations?

☐ Yes Provide Exemption(s) #: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6

☐ No Provide Assurance #, if available:

c. If applicable, please attach your "Exempt Research" or "Nonexempt Research" narrative to this form as indicated in the definitions page in the attached instructions.

Add Attachment Delete Attachment View Attachment

Tracking Number:GRANT12215655 Funding Opportunity Number:ED-GRANTS-053116-002 Received Date:Jul 15, 2016 02:30:38 AM EDT

U.S. DEPARTMENT OF EDUCATION
BUDGET INFORMATION
NON-CONSTRUCTION PROGRAMS

OMB Number: 1894-0008
Expiration Date: 06/30/2017

Name of Institution/Organization

Maricopa County Education Service Agency

Applicants requesting funding for only one year should complete the column under "Project Year 1." Applicants requesting funding for multi-year grants should complete all applicable columns. Please read all instructions before completing form.

SECTION A - BUDGET SUMMARY
U.S. DEPARTMENT OF EDUCATION FUNDS

Budget Categories	Project Year 1 (a)	Project Year 2 (b)	Project Year 3 (c)	Project Year 4 (d)	Project Year 5 (e)	Total (f)
1. Personnel	2,111,600.00	6,729,700.00	8,766,661.00	9,076,197.00	8,679,700.00	35,363,858.00
2. Fringe Benefits	737,484.00	1,779,065.00	2,186,457.00	2,248,364.00	2,095,966.00	9,047,336.00
3. Travel	94,400.00	68,600.00	94,400.00	68,600.00	68,600.00	394,600.00
4. Equipment	0.00	0.00	0.00	0.00	0.00	0.00
5. Supplies	128,715.00	55,715.00	109,715.00	109,715.00	23,000.00	426,860.00
6. Contractual	991,500.00	2,906,000.00	2,730,000.00	2,626,000.00	2,130,000.00	11,383,500.00
7. Construction	0.00	0.00	0.00	0.00	0.00	0.00
8. Other	42,000.00	32,000.00	56,000.00	16,000.00	40,000.00	186,000.00
9. Total Direct Costs (lines 1-8)	4,105,699.00	11,571,080.00	13,943,233.00	14,144,876.00	13,037,266.00	56,802,154.00
10. Indirect Costs*	382,627.00	748,923.00	741,992.00	725,691.00	597,242.00	3,196,475.00
11. Training Stipends	0.00	0.00	0.00	0.00	0.00	0.00
12. Total Costs (lines 9-11)	4,488,326.00	12,320,003.00	14,685,225.00	14,870,567.00	13,634,508.00	59,998,629.00

Indirect Cost Information *(To Be Completed by Your Business Office):

If you are requesting reimbursement for indirect costs on line 10, please answer the following questions:

(1) Do you have an Indirect Cost Rate Agreement approved by the Federal government? ☒ Yes ☐ No

(2) If yes, please provide the following information:

Period Covered by the Indirect Cost Rate Agreement: From: 07/01/2016 To: 06/30/2017 (mm/dd/yyyy)

Approving Federal agency: ☒ ED ☐ Other (please specify):

The Indirect Cost Rate is 9.60 %.

(3) If this is your first Federal grant, and you do not have an approved indirect cost rate agreement, are not a State, Local government or Indian Tribe, and are not funded under a training rate program or a restricted rate program, do you want to use the de minimis rate of 10% of MTDC? ☐ Yes ☐ No If yes, you must comply with the requirements of 2 CFR § 200.414(f).

(4) If you do not have an approved indirect cost rate agreement, do you want to use the temporary rate of 10% of budgeted salaries and wages?

☐ Yes ☐ No If yes, you must submit a proposed indirect cost rate agreement within 90 days after the date your grant is awarded, as required by 34 CFR § 75.560.

(5) For Restricted Rate Programs (check one) -- Are you using a restricted indirect cost rate that:

☒ Is included in your approved Indirect Cost Rate Agreement? Or, ☐ Complies with 34 CFR 76.564(c)(2)? The Restricted Indirect Cost Rate is ____ %.

Name of Institution/Organization

Maricopa County Education Service Agency

Applicants requesting funding for only one year should complete the column under "Project Year 1." Applicants requesting funding for multi-year grants should complete all applicable columns. Please read all instructions before completing form.

SECTION B - BUDGET SUMMARY
NON-FEDERAL FUNDS

Budget Categories	Project Year 1 (a)	Project Year 2 (b)	Project Year 3 (c)	Project Year 4 (d)	Project Year 5 (e)	Total (f)
1. Personnel	0.00	0.00	0.00	0.00	0.00	0.00
2. Fringe Benefits	0.00	0.00	0.00	0.00	0.00	0.00
3. Travel	0.00	0.00	0.00			