

Status: Submitted

Last Updated: 8/6/10 4:09 PM

Technical Review Coversheet

Applicant: Winston-Salem/Forsyth County Schools -- Instructional Services, School Improvement (S385A100114)

Reader #1: *****

Points Possible Points Scored

Questions

Evaluation Criteria

Absolute Priority 1

1. Absolute Priority 1	0	0
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Absolute Priority 2

1. Absolute Priority 2	0	0
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Sub Total	0	0
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Evaluaton Criteria

Absolute Priority 3

1. Absolute Priority 3	0	0
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Sub Total	0	0
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Requirement

Requirement

1. Requirement	0	0
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Sub Total	0	0
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Evaluation Criteria

Core Element 1

1. Core Element 1	0	0
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Core Element 2

1. Core Element 2	0	0
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Core Element 3

1. Core Element 3	0	0
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Core Element 4

1. Core Element 4	0	0
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Core Element 5

1. Core Element 5	0	0
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High Quality Professional Development

1. Professional Development	0	0
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Sub Total	0	0
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Selection Criteria

Need for the Project

1. Need for Project	10	10
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Project Design

1.Project Design	60	53
Adequacy of Support for the Proposed Project		
1.Adequacy of Support	25	23
Quality of Local Evaluation		
1.Quality of Local Eval.	5	4
Sub Total	100	90

Priority Questions

Priority Preference

Competitive Preference Priority 1

1.Competitive Priority 1	5	5
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Competitive Preference Priority 2

1.Competitive Priority 2	5	4
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Sub Total	10	9
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Total	110	99
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Technical Review Form

Panel #10 - Panel - 10: 84.385A

Reader #1: *****

Applicant: Winston-Salem/Forsyth County Schools -- Instructional Services, School Improvement
(S385A100114)

Questions

Evaluation Criteria - Absolute Priority 1

1. Priority 1: Differentiated Levels of Compensation for Effective Teachers and Principals:

Comment on how well the applicant demonstrates that --

It will develop and implement a PBCS that rewards, at differentiated levels, teachers and principals who demonstrate their effectiveness by improving student achievement (as defined in the Federal Register notice) as part of the coherent and integrated approach of the local educational agency (LEA) to strengthening the educator workforce.

In determining teacher and principal effectiveness as part of the PBCS, the LEA - -

- (a) Must give significant weight to student growth (as defined in the Federal Register notice), based on objective data on student performance;
- (b) Must include observation-based assessments of teacher and principal performance at multiple points in the year, carried out by evaluators trained in using objective evidence-based rubrics for observation, aligned with professional teaching standards; and, if applicable, as part of the LEA's coherent and integrated approach to strengthening the educator workforce; and
- (c) May include other measures, such as evidence of leadership roles (as defined in the Federal Register notice), that increase the effectiveness of other teachers in the school or LEA.

In determining principal effectiveness as part of a PBCS, the LEA must give significant weight to student growth (as defined in the Federal Register notice) and may include supplemental measures such as high school graduation and college enrollment rates. In addition, the applicant must demonstrate that the differentiated effectiveness incentive payments will provide incentive amounts that are substantial and provide justification for the level of incentive amounts chosen. While the Department does not propose a minimum incentive amount, the Department encourages applicants to be thorough in their explanation of why the selected incentive amounts are likely high enough to create change in the behavior of current and prospective teachers and principals in order to ultimately improve student outcomes.

General:

This proposal presents a sound compensation system that differentiates incentives for teachers and principals who demonstrate their effectiveness by improving student achievement. The proposed initiative provides three differentiated levels of incentive compensation for effective teachers and two tiers of compensation for effective principals (p. e8). Each level of compensation is "directly connected to student growth of a targeted group of students and is proportional to the size of the group involved" (p. e9). Core teachers can earn up to \$4500 a year in incentives (p. e21). This amount is enough to motivate teachers. Various tools such as the teacher observation rubric based on the state's quality teaching standards will measure this student growth. In addition, the teachers' EVAAS (value added) data will be analyzed for effectiveness by utilizing the aggregated student growth (p. e24). Highly effective teachers will get extra compensation for taking on coaching roles and facilitating professional development activities.

Reader's Score: 0

Evaluation Criteria - Absolute Priority 2

1. Priority 2: Fiscal Sustainability of the Performance-Based Compensation System (PBCS):

Comment on how well the applicant demonstrates that - -

(a) The applicant has projected costs associated with the development and implementation of the PBCS, during the project period and beyond, and has accepted the responsibility to provide such performance-based compensation to teachers, principals, and other personnel (in those sites in which the grantee wishes to expand the PBCS to additional staff in its schools) who earn it under the system; and

(b) The applicant will provide from non-TIF funds over the course of the five-year project period an increasing share of performance-based compensation paid to teachers, principals, and other personnel (in those sites in which the grantee wishes to expand the PBCS to additional staff in its schools) in those project years in which the LEA provides such payments as part of its PBCS.

General:

Based on the proposal's goals and activities, the projected program costs seem adequate. The proposed PBCS allows participating teachers to earn up to 10% of their traditional salary and principals can earn up to 5% of their traditional salary. The district has committed to pledge an increasing percent of the proposal's budget starting in year 3 (p. 55) and to even use federal Title I and II monies to fund the program beyond the grant if necessary.

Reader's Score: 0

Evaluation Criteria - Absolute Priority 3

1. Priority 3: Comprehensive Approaches to the Performance-Based Compensation System:

Comment on how well the applicant demonstrates that - -

The proposed PBCS is aligned with a coherent and integrated strategy for strengthening the educator workforce, including in the use of data and evaluations for professional development and retention and tenure decisions in the LEA or LEAs participating in the project during and after the end of the TIF project period.

General:

The administration of the project's value added model and enhanced teacher evaluation process has the potential to greatly enhance the capacity of teachers at the selected sites. If this initiative results in raising student achievement, the district has pledged to replicate the program at similar high needs schools within the district. This has broad implications for teacher retention in high needs schools. The plan does not meaningfully address how the proposal will impact teacher tenure decisions in the district.

Reader's Score: 0

Requirement - Requirement

1. REQUIREMENT: Comment on the quality of the applicant's description of how its proposed PBCS will provide educators with incentives to take on additional responsibilities and

leadership roles (as defined in the Federal Register notice.

General:

The proposal briefly mentions that exceptional teachers can earn incentive pay by taking addition roles as lead coaches and professional development facilitators (p. e23). The incentive for these roles, \$500 is not convincing.

Reader's Score: 0

Evaluation Criteria - Core Element 1

1.Core Element 1:

Comment on the quality of the applicant's plan for effectively communicating to teachers, administrators, other school personnel, and the community at-large the components of its performance based compensation system.

General:

The proposal includes a plan to develop a communication system that will effectively communicate key elements of the program to teacher, principals, school staff and the general public. The superintendent of schools will first explain the program to several key groups. Then the TIF Implementation team will meet regularly to coordinate with school and district officials. The teacher's union will meet monthly with the Superintendent for the first year of the program. The three month planning period seems brief to develop such an extensive communication plan.

Reader's Score: 0

Evaluation Criteria - Core Element 2

1.Core Element 2:

Comment on the quality of the applicant's involvement and support of teachers, principals, and other personnel (including input from teachers, principals, and other personnel in the schools and LEAs to be served by the grant) and the involvement and support of unions in participating LEAs (where they are the designated exclusive representatives for the purpose of collective bargaining) that is needed to carry out the grant.

General:

The proposal states that the initiative's communication and public relation plan should be in place by December of 2010 and January of 2011. Specific details about those plans are lacking in the application. However, the application does state that program personnel will make sure key stake holders are "well informed" about the program (p. e25). The application emphasized that dialogue with the union about this funding started early. However, the application does not include a letter of support from the union.

Reader's Score: 0

Evaluation Criteria - Core Element 3

1.Core Element 3:

Comment on the quality of the applicant's implementation, or plan to implement, a rigorous, transparent, and fair evaluation systems for teachers and principals that

differentiate effectiveness using multiple rating categories that take into account student growth (as defined in the Federal Register notice) as a significant factor, as well as classroom observations conducted at least twice during the school year. The evaluation process must: (1) use an objective, evidence-based rubric aligned with professional teaching or leadership standards and the LEA's coherent and integrated approach to strengthening the educator workforce; (2) provide for observations of each teacher or principal at least twice during the school year by individuals (who may include peer reviewers) who are provided specialized training; (3) incorporate the collection and evaluation of additional forms of evidence; and (4) ensure a high degree of inter-rater reliability (i.e., agreement among two or more raters who score approximately the same).

General:

The project plans to revise the district's teacher evaluation system during the planning year and create an observation tool with a rubric that has multiple ratings. The new tool will be based on North Carolina's Teacher Evaluation Process. The evaluation team will conduct the teacher observations for the evaluation twice a year; thus, this should create a high degree of inter rater reliability. The overhaul of the teacher evaluation system should enhance the quality of teacher effectiveness at the selected schools.

Reader's Score: 0

Evaluation Criteria - Core Element 4

1. Core Element 4:

Comment on the quality of the applicant's implementation or plan to implement, a data-management system that can link student achievement (as defined in the Federal Register notice) data to teacher and principal payroll and human resources systems.

General:

The proposal lays out a detailed plan to attach a multi-layered Excel spreadsheet to each staff's account in the district's payroll data system in order to track incentives. The application also stated that Educational Value Added Assessment System (EVAAS) would be willing to house some of the program's value added data for the duration of the grant since they already provide this service for the district. It is unclear if either system will be able to directly link student data with teacher data.

Reader's Score: 0

Evaluation Criteria - Core Element 5

1. Core Element 5:

Comment on the quality of the applicant's plan for ensuring that teachers and principals understand the specific measures of teacher and principal effectiveness included in the PBCS, and receive professional development that enables them to use data generated by these measures to improve their practice.

General:

The proposal indicates that its communication plan will be in place by December of 2010. But it is unclear if this goal is realistic. Although the application does not include specific details for this plan, the goal is to make sure teachers and principals understand pertinent program information like the specific measures of teacher and principal effectiveness. Program staff will communicate with key campus committees to provide this information. The professional development plan will be aligned to the state standards, which are aligned with the program's teacher and principal evaluation system (p. e31). Therefore, teachers will be able to improve their practice based on the

professional development.

Reader's Score: 0

Evaluation Criteria - High Quality Professional Development

1. High Quality Professional Development:

Comment on the applicant's demonstration that ---

Its proposed PBCS will include a high-quality professional development component for teachers and principals consistent with the definition of the term professional development in section 9101(34) of the ESEA. The applicant must demonstrate that its PBCS has a professional development component in place, or a specific plan for developing one, that is directly linked to the specific measures of teacher and principal effectiveness included in the PBCS. The professional development component of the PBCS must - -

(1) Be based on needs assessed either at the high-need schools (as defined in the Federal Register notice) participating in the applicant's proposed PBCS or LEA-wide;

(2) Be targeted to individual teacher's and principal's needs as identified in the evaluation process;

(3) Provide --

(a) Those teachers and principals in participating TIF schools who do not receive differentiated compensation based on effectiveness under the PBCS with the tools and skills they need to improve their effectiveness in the classroom or school and be able to raise student achievement (as defined in the Federal Register notice); and

(b) Those teachers and principals who are deemed to be effective and who, therefore, receive differentiated compensation under the PBCS, with the tools and skills they need to (1) continue effective practices in the classroom or school and raise student achievement (as defined in the Federal Register notice), and (2) successfully assume additional responsibilities and leadership roles (as defined in the Federal Register notice);

(4) Support teachers and principals to better understand and use the measures of effectiveness in the PBCS to improve practice and student achievement (as defined in the Federal Register notice); and

(5) Include a process for regularly assessing the effectiveness of this professional development in improving teacher and leadership practice to increase student achievement (as defined in the Federal Register notice) and making modifications necessary to improve its effectiveness.

General:

Overall, the proposal has a very comprehensive plan for professional development. For example, the Learning Focused model, is already in place at the district for secondary school teachers. This model provides a framework that guides teachers in incorporating researched best practices in regards to strategies that "consistently show the strongest correlation between use and student achievement" (p. e32). As teachers implement these strategies in their classroom, they will be monitored and assisted.

Teacher evaluations will be based on observation tools that rate teacher performance in four different categories. Lead coaches and professional development facilitators will then base professional development activities on areas that teachers demonstrated they need improvement in (p. e34). These lead coaches will provide extra support to TIF teachers who do not receive bonuses so that they can improve their practice.

The evaluation plan included collected periodic feedback about professional development for feedback to inform periodic modifications.

Reader's Score: 0

Selection Criteria - Need for the Project

1.(A): Need for the project (10 points):

In determining the need for the proposed project, the Secretary will consider the extent to which the applicant establishes that--

1) The high-need schools (as defined in the Federal Register notice) whose educators would be part of the PBCS have difficulty--

(i) Recruiting highly qualified or effective teachers, particularly in hard-to-staff subjects or specialty areas, such as mathematics, science, English language acquisition, and special education; and

(ii) Retaining highly qualified or effective teachers and principals.

(2) Student achievement (as defined in the Federal Register notice) in each of the schools whose educators would be part of the PBCS is lower than in what the applicant determines are comparable schools in the LEA, or another LEA in its State, in terms of key factors such as size, grade levels, and poverty levels; and

(3) A definition of what it considers a "comparable" school for the purposes of paragraph (2) of this selection criterion is established.

Strengths:

The proposal successfully proves that it qualifies, as a high needs because it demonstrated its needs to retain highly qualified teachers for hard to staff positions. According to the application, the district with the support of the University of North Carolina at Greensboro identifies math, science, English, language acquisition and Exceptional Children as high need subjects (e11). These positions make up 57% of all vacancies within the middle schools (e11). Teacher retention was noted as a significant problem too. For instance, Mineral Springs Middle School has a free and reduced lunch student population of 93% and a teacher attrition rate of 23%, 8% higher than the state average rate for middle school attrition (e12). The applicant defines comparable schools for the purposes of this project as "similar size, grade levels, percentage of free-and reduced lunch, minority makeup, and student growth composite" (e18). The applicant provides data that demonstrates that the comparable schools outperformed the 12 selected TIF schools in meeting their 2009-2010 AYPs (e18).

Weaknesses:

There are no weaknesses noted.

Reader's Score: 10

Selection Criteria - Project Design

1.(B): Project design (60 points)

In determining the quality of the design of the proposed project, the Secretary will consider the extent to which the proposed PBCS--

(1) Is part of a proposed LEA or statewide strategy, as appropriate, for improving the process by which each participating LEA rewards teachers, principals, and other personnel (in those sites in which the grantee wishes to expand the PBCS to additional staff in its schools) in high-need schools (as defined in the Federal Register notice) based upon their effectiveness as determined in significant part by student growth (as defined in the

Federal Register notice). With regard to the effectiveness of teachers, principals, and other personnel, the Secretary will consider whether--

(i) The methodology the LEA or SEA proposes to use in its PBCS to determine the effectiveness of a school's teachers, principals, and other personnel (in those sites in which the grantee wishes to expand the PBCS to additional staff in its schools) includes valid and reliable measures of student growth (as defined in the Federal Register notice);

(ii) The participating LEA would use the proposed PBCS to provide performance awards to teachers, principals, and other personnel (in those sites in which the grantee wishes to expand the PBCS to additional staff in its schools) that are of sufficient size to affect the behaviors of teachers, principals, and other personnel and their decisions as to whether to go to, or remain working in, the high-need school; and

(iii) The applicant provides a clear explanation of how teachers, principals, and other personnel (in those sites in which the grantee wishes to expand the PBCS to additional staff in its schools) are determined to be "effective" for the purposes of the proposed PBCS.

(2) Has the involvement and support of teachers, principals, and other personnel (in those sites in which the grantee wishes to expand the PBCS to additional staff in its schools), including input from teachers, and principals, and other personnel in the schools and LEAs to be served by the grant, and the involvement and support of unions in participating LEAs where they are the designated exclusive representatives for the purpose of collective bargaining that is needed to carry out the grant;

(3) Includes rigorous, transparent, and fair evaluation systems for teachers and principals that differentiate levels of effectiveness using multiple rating categories that take into account data on student growth (as defined in the Federal Register notice) as a significant factor, as well as classroom observations conducted at least twice during the school year;

(4) Includes a data-management system, consistent with the LEA's proposed PBCS, that can link student achievement (as defined in the Federal Register notice) data to teacher and principal payroll and human resources systems; and

(5) Incorporates high-quality professional development activities that increase the capacity of teachers and principals to raise student achievement (as defined in the Federal Register notice) and are directly linked to the specific measures of teacher and principal effectiveness included in the PBCS.

Strengths:

The methodology that the applicant proposes to use for the proposal to determine the effectiveness of teachers and principals includes valid and reliable measures of student growth. For instance, the project design includes several measures of student growth on various levels including campus-wide, grade level and classroom. These measures of student growth are based on the EVAAS model, which " analyzes student growth as a measure of potential and actual achievement" (e19). This value added model of student achievement is the crux of the proposed design plan. The proposal offers teachers who are willing to commit to complete specific professional development activities and commit to remaining for a year a bonus incentive of \$10k for hard to staff positions. (e20). This generous incentive should have a positive impact on teacher recruitment.

The applicant provides a clear explanation of how participating teachers and principals are determined to be "effective" for the purpose of the proposal. This determination will be based on two major factors: a value added assessment and teacher/principal evaluations. Teachers must show "student growth of at least one standard error above the average growth" (p. e24) in their value added model and teachers and principals must rate "proficient" on all domains of the program's classroom observation rubric (p. e24).

The participating district has already been in communication with the teacher's union regarding the proposal. The program will utilize the union as a major vehicle to relay crucial aspects of the program such as the incentive pay and requirements to earn it and definitions of teacher effectiveness. Small committees called " STAR Teams" will be formed at the selected school sites to garner feedback and input about the program. Their membership will include teachers, classified staff and administrators (p. e25).

Since the district's existing teacher observation system is designed to be implemented once a year for new teachers, the proposal will design an observation tool specifically for the program that will be administered twice a year. The currently practiced principal evaluation system meets the criteria of the grant; thus, it will continued to be used (p. e28). The initiative's trained evaluators will conduct the teacher observations. The observation rubric will be based on the Framework for 21st Century Learning and North Carolina state standards (p. e7). This instrument has already been "field-tested and analyzed for validity and reliability" (p. e27).

The proposal includes a plan to expand the district's SUNPAC software, their data management system, to include information regarding the incentive pay (p. e28). The district's pre-existing value added data is already housed in EVAAS data system. They have agreed to store additional data generated by this initiative (p. e29).

This project will take advantage of the high quality professional development activities that the district administers. The professional development plan will incorporate these activities and align them with the state standards so that teachers are able to address specific issues that will enhance student achievement and address issues that surface as a result of their evaluations (p. e31). The proposal states that it would consider ways in which the program can "inform" teacher tenure and retention during the 3 month planning period (p. e9).

Weaknesses:

It seems as though the commitment for the hard to staff bonus incentive of \$10k is significant enough to require a longer teaching commitment of at least two years, but incentive pay of \$500 for leadership positions are not significant enough to motivate teachers to take on the extra responsibilities (p.24). The application did not include letters of support from the union, even though it stated that they had the union's support.

Reader's Score: 53

Selection Criteria - Adequacy of Support for the Proposed Project

1.(C): Adequacy of Support for the Proposed Project (25 points):

In determining the adequacy of the support for the proposed project, the Secretary considers the extent to which--

- (1) The management plan is likely to achieve the objectives of the proposed project on time and within budget, and includes clearly defined responsibilities and detailed timelines and milestones for accomplishing project tasks;
- (2) The project director and other key personnel are qualified to carry out their responsibilities, and their time commitments are appropriate and adequate to implement the project effectively;
- (3) The applicant will support the proposed project with funds provided under other Federal or State programs and local financial or in-kind resources; and
- (4) The requested grant amount and project costs are sufficient to attain project goals and reasonable in relation to the objectives and design of the project.

Strengths:

Overall, the management plan is likely to achieve the objectives of the proposal. Milestones for the project implementation were included in the timeline along with the person responsible for implementation. The district personnel assigned to key positions seem well experienced and qualified.

The district strongly supports this project. It promises to absorb various components of the program like the cost of professional development as much as possible (p. e53). It pledges to contribute 20% of the project in year 3, 40% in year 4 and 60% in year 5 (p. e54). The district is willing to utilize federal Title I and II monies to sustain the program if necessary.

The requested grant amount of \$14,000,000 are sufficient to attain the program's goals in relation to the scope of the project.

Weaknesses:

The management plan did not indicate time commitment for the various positions or who is responsible for key tasks during the implementation of the grant on the timeline(p. 47-52).

Reader's Score: 23

Selection Criteria - Quality of Local Evaluation

1.(D) Quality of Local Evaluation (5 points):

In determining the quality of the local project evaluation, the Secretary considers the extent to which the applicant's evaluation plan--

(1) Includes the use of strong and measurable performance objectives (that are clearly related to the goals of the project) for raising student achievement (as defined in the Federal Register notice), increasing the effectiveness of teachers, principals, and other personnel (in those sites in which the grantee wishes to expand the PBCS to additional staff in its schools), and retaining and recruiting effective teachers, principals, and other personnel;

(2) Will produce evaluation data that are quantitative and qualitative; and

(3) Includes adequate evaluation procedures for ensuring feedback and continuous improvement in the operation of the proposed project.

Strengths:

The evaluation plan includes the collection of quantitative and qualitative data. This includes interviews, transcriptions from focus groups, meeting minutes, both qualitative ratings and qualitative feedback for professional development, and data collected to measure student growth for their value added model. During their planning year, they will develop a process to analyze data collected about the perceptions of school staff via surveys, interviews, and focus groups. Some measures that they will analyze and document student achievement include "measures of teacher efficacy, teacher assumption of leadership roles, and teacher, grade-level, and school-level student growth" (p. e56). The communication plan developed in the planning year will provide constant a communication stream "within schools, to the program director, the district team, and to the evaluation staff" (p. e58). This information will be used to monitor and modify program implementation.

Weaknesses:

The evaluation plan lacks details about how the data will be analyzed. It is also problematic that the proposal has not identified an evaluator at this point in the design plan.

Reader's Score: 4

Priority Questions

Priority Preference - Competitive Preference Priority 1

1. Competitive Preference Priority: Use of Value-Added Measures of Student Achievement. (Up to 5 points):

To meet this competitive preference priority, the applicant must demonstrate, in its application, that the proposed PBCS for teachers, principals, and other personnel (in those sites in which the grantee wishes to expand the PBCS to additional staff in its schools) will use a value-added measure of the impact on student growth (as defined in the Federal Register notice) as a significant factor in calculating differentiated levels of compensation provided to teachers, principals, and other personnel (in those sites in which the grantee wishes to expand the PBCS to additional staff in its schools).

Under this priority, the applicant must also demonstrate that it has a plan to ensure that, as part of the PBCS, it has the capacity to (1) implement the proposed value-added model (e.g., through robust data systems that collect the necessary data and ensure data quality), and (2) clearly explain the chosen value-added model to teachers to enable them to use the data generated through the model to improve classroom practices.

Strengths:

The district has worked with EVAAS for many years to provide value-added measures (p. e23). The proposal will use these valid measures to "provide incentive pay for all staff in schools that demonstrate student growth, additional incentive pay for administrators and instructional staff for demonstrated grade level growth, and additional incentive pay for effective teachers and assistants in classrooms with demonstrated student growth" (p. e23). Teachers will be able to use data from this value added model to improve classroom practice. The data management plan includes specific recommendations about how the district's payroll system will be modified in order to manage the processing of these incentives. Lastly, the programs communication plan includes strategies for relaying this information to staff. For instance, the superintendent will meet with the union monthly during the first year to ensure they understand the process.

Weaknesses:

There are no weaknesses noted.

Reader's Score: 5

Priority Preference - Competitive Preference Priority 2

1. Competitive Preference Priority: Increased Recruitment and Retention of Effective Teachers to Serve High-Need Students and in Hard-to-Staff Subjects and Specialty Areas in High-Need Schools. (Up to 5 points):

To meet this competitive preference priority, the applicant must demonstrate in its application that its proposed PBCS is designed to assist high-need schools (as defined in the Federal Register notice) to (1) serve high-need students (as defined in the Federal Register notice), (2) retain effective teachers in teaching positions in hard-to-staff subjects and specialty areas, such as mathematics, science, special education, and English language acquisition, and (3) fill vacancies with teachers of those subjects or specialty areas who are effective or likely to be effective. The applicant must provide an explanation for how it will determine that a teacher filling a vacancy is effective or likely to be effective. In addition, applicants must demonstrate, in their applications,

the extent to which the subjects or specialty areas they propose to target are hard-to-staff. Lastly, applicants must demonstrate, in their applications that they will implement a process for effectively communicating to teachers which of the LEA's schools are high-need and which subjects and specialty areas are considered hard-to-staff.

Strengths:

The proposal demonstrated that the targeted schools are high needs and that certain subjects, namely math, science, English as a Second Language, and Special Education , are hard to staff based on free/ reduce lunch identification, teacher retention rates and student test scores. A \$10k signing bonus will be given to teachers recruited to teach hard to staff subjects. This incentive should motivate recruits to accept the placements. The yearly individual and school wide incentives should motivate them to stay.

Weaknesses:

The proposal does not address how they will measure if their recruits are effective or likely to be effective.

Reader's Score: 4

Status: Submitted
Last Updated: 8/6/10 4:09 PM

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Technical Review Coversheet

Applicant: Winston-Salem/Forsyth County Schools -- Instructional Services, School Improvement (S385A100114)

Reader #2: *****

Points Possible Points Scored

Questions

Evaluation Criteria

Absolute Priority 1

1. Absolute Priority 1	0	0
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Absolute Priority 2

1. Absolute Priority 2	0	0
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Sub Total	0	0
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Evaluation Criteria

Absolute Priority 3

1. Absolute Priority 3	0	0
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Sub Total	0	0
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Requirement

Requirement

1. Requirement	0	0
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Sub Total	0	0
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Evaluation Criteria

Core Element 1

1. Core Element 1	0	0
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Core Element 2

1. Core Element 2	0	0
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Core Element 3

1. Core Element 3	0	0
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Core Element 4

1. Core Element 4	0	0
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Core Element 5

1. Core Element 5	0	0
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High Quality Professional Development

1. Professional Development	0	0
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Sub Total	0	0
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Selection Criteria

Need for the Project

1. Need for Project	10	10
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Project Design

1.Project Design	60	50
Adequacy of Support for the Proposed Project		
1.Adequacy of Support	25	20
Quality of Local Evaluation		
1.Quality of Local Eval.	5	3
Sub Total	100	83

Priority Questions

Priority Preference

Competitive Preference Priority 1

1.Competitive Priority 1	5	5
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Competitive Preference Priority 2

1.Competitive Priority 2	5	3
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Sub Total	10	8
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Total	110	91
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Technical Review Form

Panel #10 - Panel - 10: 84.385A

Reader #2: *****

Applicant: Winston-Salem/Forsyth County Schools -- Instructional Services, School Improvement
(S385A100114)

Questions

Evaluation Criteria - Absolute Priority 1

1. Priority 1: Differentiated Levels of Compensation for Effective Teachers and Principals:

Comment on how well the applicant demonstrates that --

It will develop and implement a PBCS that rewards, at differentiated levels, teachers and principals who demonstrate their effectiveness by improving student achievement (as defined in the Federal Register notice) as part of the coherent and integrated approach of the local educational agency (LEA) to strengthening the educator workforce.

In determining teacher and principal effectiveness as part of the PBCS, the LEA - -

- (a) Must give significant weight to student growth (as defined in the Federal Register notice), based on objective data on student performance;
- (b) Must include observation-based assessments of teacher and principal performance at multiple points in the year, carried out by evaluators trained in using objective evidence-based rubrics for observation, aligned with professional teaching standards; and, if applicable, as part of the LEA's coherent and integrated approach to strengthening the educator workforce; and
- (c) May include other measures, such as evidence of leadership roles (as defined in the Federal Register notice), that increase the effectiveness of other teachers in the school or LEA.

In determining principal effectiveness as part of a PBCS, the LEA must give significant weight to student growth (as defined in the Federal Register notice) and may include supplemental measures such as high school graduation and college enrollment rates. In addition, the applicant must demonstrate that the differentiated effectiveness incentive payments will provide incentive amounts that are substantial and provide justification for the level of incentive amounts chosen. While the Department does not propose a minimum incentive amount, the Department encourages applicants to be thorough in their explanation of why the selected incentive amounts are likely high enough to create change in the behavior of current and prospective teachers and principals in order to ultimately improve student outcomes.

General:

The applicant describes a differentiated performance based compensation system for 12 high needs schools in Winston-Salem. The proposed project includes a comprehensive value-added component which utilizes student growth with multiple measures, including state and national assessments, giving significant weight to student growth. The proposed project includes an observation-based assessment with rubrics aligned with professional teaching standards. The proposed project seeks to address high teacher turnover rates in hard-to-staff areas. The project will focus on improved teacher recruitment, retention, and rewards. The proposed PBCS project will build upon an existing bonus pay system for teachers that has been in place since 1997. The applicant explains the differentiated compensation system based on student growth and other factors, including multiple observations and professional development. The applicant indicates that discussions regarding the amount of compensation affirmed that these awards are of sufficient size to be meaningful. (pp. 3; 22-24; 10-11; 34-39)

Reader's Score: 0

Evaluation Criteria - Absolute Priority 2

1. Priority 2: Fiscal Sustainability of the Performance-Based Compensation System (PBCS):

Comment on how well the applicant demonstrates that - -

(a) The applicant has projected costs associated with the development and implementation of the PBCS, during the project period and beyond, and has accepted the responsibility to provide such performance-based compensation to teachers, principals, and other personnel (in those sites in which the grantee wishes to expand the PBCS to additional staff in its schools) who earn it under the system; and

(b) The applicant will provide from non-TIF funds over the course of the five-year project period an increasing share of performance-based compensation paid to teachers, principals, and other personnel (in those sites in which the grantee wishes to expand the PBCS to additional staff in its schools) in those project years in which the LEA provides such payments as part of its PBCS.

General:

The applicant has projected costs associated with the development and implementation of the proposed PBCS during the grant period, but does not provide specific details on how non-TIF funds will be secured over the course of the 5 year project period and after the grant funding has ended, and how the district will contribute an increasing share of performance-based compensation paid to teachers, principals and other personnel. The applicant merely states that "During the duration of the project, the district will assume greater financial responsibility by utilizing other federal, state, and locally provided funds in increasing percentages to wean reliability from the grant provided funds". (p. 10; 54-55; Budget Narrative and Budget)

Reader's Score: 0

Evaluaton Criteria - Absolute Priority 3

1. Priority 3: Comprehensive Approaches to the Performance-Based Compensation System:

Comment on how well the applicant demonstrates that - -

The proposed PBCS is aligned with a coherent and integrated strategy for strengthening the educator workforce, including in the use of data and evaluations for professional development and retention and tenure decisions in the LEA or LEAs participating in the project during and after the end of the TIF project period.

General:

The applicant proposes a PBCS that includes the use of data and evaluations for professional development and teacher effectiveness based on student growth. The district has been using a value-added model of individual student growth measurement based on effective instruction for a given period of time. The model, Educational Value-Added Assessment System, will be used to determine effectiveness and be the basis for performance based compensation. The proposed PBCS is aligned with a coherent and integrated strategy for strengthening the educator workforce. The proposed plan includes the use of multiple sources of evaluation data, including student growth, multiple observations, and professional development which will be used for retention and tenure decisions. (p. 11; 24-25)

Reader's Score: 0

Requirement - Requirement

1. **REQUIREMENT:** Comment on the quality of the applicant's description of how its proposed PBCS will provide educators with incentives to take on additional responsibilities and leadership roles (as defined in the Federal Register notice).

General:

The applicant indicates that the professional development of the proposed PBCS is a highly individualized model that provides opportunities for staff to serve in leadership roles in a variety of capacities. The leadership roles or additional responsibilities include mentoring for those staff members who are deemed to be less than effective, expanding knowledge of school operations, attending workshops to help them advance on the domain levels of the North Carolina Teacher Evaluation Process and North Carolina Principal Evaluation Process (NCTEP/NCPEP). (pp. 40-42)

Reader's Score: 0

Evaluation Criteria - Core Element 1

1. Core Element 1:

Comment on the quality of the applicant's plan for effectively communicating to teachers, administrators, other school personnel, and the community at-large the components of its performance based compensation system.

General:

The applicant describes its communication plan to ensure that all stakeholders have a clear understanding of its purpose, mission, and implementation process. The applicant indicates that a developed public relations plan will be in place by December 2010. The Superintendent will lead the early efforts presenting an overview of Project Star to various stakeholder groups including teachers, parents, students, principals, leadership and data teams, classified employees and senior staff. A TIF Implementation Team will be created to guide planning and district level implementation, and will meet weekly to ensure that the core elements are in place by December 2010. Because of the limited planning phase (3 months), it is not clear that all aspects of the communication plan will be adequately developed. Since it is not evident that teacher and principal support is garnered, the planning phase may take longer than 3 months. (pp. 25-26)

Reader's Score: 0

Evaluation Criteria - Core Element 2

1. Core Element 2:

Comment on the quality of the applicant's involvement and support of teachers, principals, and other personnel (including input from teachers, principals, and other personnel in the schools and LEAs to be served by the grant) and the involvement and support of unions in participating LEAs (where they are the designated exclusive representatives for the purpose of collective bargaining) that is needed to carry out the grant.

General:

The applicant proposes a 3 month planning period for the proposed PBCS project and indicates that it will be operational by January 2011. The superintendent will engage teachers and principals after a successful review of the proposal in dialogue and request support and involvement. There is no evidence that teachers or principals have been involved in the preparation of this proposed project, or that they support the model. A three month planning period is insufficient time to garner that support and implement the project. (pp. 3-9)

Reader's Score: 0

Evaluation Criteria - Core Element 3

1. Core Element 3:

Comment on the quality of the applicant's implementation, or plan to implement, a rigorous, transparent, and fair evaluation systems for teachers and principals that differentiate effectiveness using multiple rating categories that take into account student growth (as defined in the Federal Register notice) as a significant factor, as well as classroom observations conducted at least twice during the school year. The evaluation process must: (1) use an objective, evidence-based rubric aligned with professional teaching or leadership standards and the LEA's coherent and integrated approach to strengthening the educator workforce; (2) provide for observations of each teacher or principal at least twice during the school year by individuals (who may include peer reviewers) who are provided specialized training; (3) incorporate the collection and evaluation of additional forms of evidence; and (4) ensure a high degree of inter-rater reliability (i.e., agreement among two or more raters who score approximately the same).

General:

The applicant indicates that tools already in place for teachers and principals will form the basis of a rigorous, fair, and transparent evaluation system. Upon adoption of the value-added model, a comprehensive training program was put into place. An existing objective, evidence-based rubric aligned with professional standards of teaching and leadership is proposed and the value-added component will be added during the 3 month planning phase. The new modified evaluation instruments will include the development of a portfolio that includes artifacts to provide evidence to support the ratings. Multiple observations with a high degree inter-rater reliability, and student growth data are also significant components of the proposed evaluation system. (pp. 6-8)

Reader's Score: 0

Evaluation Criteria - Core Element 4

1. Core Element 4:

Comment on the quality of the applicant's implementation or plan to implement, a data-management system that can link student achievement (as defined in the Federal Register notice) data to teacher and principal payroll and human resources systems.

General:

The applicant indicates that a plan is already in place to merge necessary information about personnel at the 12 target schools with the necessary value-added assessment tool information, so that dollar amounts can be provided to the Financial Services department to pay out incentive bonuses. The plan involves a multi-tiered Excel spreadsheet connected to an Access database in order to track the data necessary for the

differentiated pay and other data collection necessary for the proposed project. (pp. 8; 25-26)

Reader's Score: 0

Evaluation Criteria - Core Element 5

1. Core Element 5:

Comment on the quality of the applicant's plan for ensuring that teachers and principals understand the specific measures of teacher and principal effectiveness included in the PBCS, and receive professional development that enables them to use data generated by these measures to improve their practice.

General:

The applicant proposes a comprehensive professional development plan that focuses on building an understanding of teachers and principals of the specific measures of effectiveness included in the proposed PBCS to improve practice. However, the applicant does not address how or if the teachers and principals will receive professional development that enables them to use data generated by these measures to improve their practice. The planning period of three months to put in place a structure for effective communication about the performance based compensation system does not appear to allow adequate time to include the involvement of teachers, administrators, and other school staff in the development of the plan; the development of rubrics for determining teacher effectiveness in non-tested grades and subjects; the development of the necessary observation protocol and rubrics and establishment of high inter-rater reliability; the development of the professional development timeline including training on the new observation instrument; and the administration of assessments in grades K, 1 and 2. In addition, building the stand alone component of the data management system during this three months seems unrealistic. This is an ambitious timeline and without having garnered the support in the development process of the proposal, it is not evident that everything can be accomplished within this timeframe. (p. 9; 42-46)

Reader's Score: 0

Evaluation Criteria - High Quality Professional Development

1. High Quality Professional Development:

Comment on the applicant's demonstration that ---

Its proposed PBCS will include a high-quality professional development component for teachers and principals consistent with the definition of the term professional development in section 9101(34) of the ESEA. The applicant must demonstrate that its PBCS has a professional development component in place, or a specific plan for developing one, that is directly linked to the specific measures of teacher and principal effectiveness included in the PBCS. The professional development component of the PBCS must - -

(1) Be based on needs assessed either at the high-need schools (as defined in the Federal Register notice) participating in the applicant's proposed PBCS or LEA-wide;

(2) Be targeted to individual teacher's and principal's needs as identified in the evaluation process;

(3) Provide --

(a) Those teachers and principals in participating TIF schools who do not receive differentiated compensation based on effectiveness under the PBCS with the tools and skills they need to improve their effectiveness in the classroom or school and be able to

raise student achievement (as defined in the Federal Register notice); and
(b) Those teachers and principals who are deemed to be effective and who, therefore, receive differentiated compensation under the PBCS, with the tools and skills they need to
(1) continue effective practices in the classroom or school and raise student achievement (as defined in the Federal Register notice), and (2) successfully assume additional responsibilities and leadership roles (as defined in the Federal Register notice);
(4) Support teachers and principals to better understand and use the measures of effectiveness in the PBCS to improve practice and student achievement (as defined in the Federal Register notice); and
(5) Include a process for regularly assessing the effectiveness of this professional development in improving teacher and leadership practice to increase student achievement (as defined in the Federal Register notice) and making modifications necessary to improve its effectiveness.

General:

The applicant indicates that the professional development is catered to high-needs schools and targeted to individual teachers' and principals' needs as identified in the evaluation process. It is aligned with state mandated structures to improve student academic achievement. The proposed professional development plan is an individualized one that includes those teachers and principals in TIF schools who do not receive differentiated compensation in professional development activities targeted to specific needs identified from a comprehensive, objective, and systematic assessment of strengths and needs. Those teachers and principals who are deemed effective will be able to become mentors and assume leadership responsibilities as part of their individualized professional development plan. The components of the professional development are a Professional Learning Team, a Learning Focused model at the secondary level, differentiated instruction, response to intervention, and data literacy. The proposed professional development plan has components to support teachers and principals to better understand and use the measures of effectiveness in the PBCS to improve practice and student achievement. Regular and ongoing reflection is a crucial component of the plan and instructional coaches provide regular and on-going feedback assessment from both teachers and administrators for continuous program improvement. (pp. 32-35; 40-46)

Reader's Score: 0

Selection Criteria - Need for the Project

1. (A): Need for the project (10 points):

In determining the need for the proposed project, the Secretary will consider the extent to which the applicant establishes that--

1) The high-need schools (as defined in the Federal Register notice) whose educators would be part of the PBCS have difficulty--

(i) Recruiting highly qualified or effective teachers, particularly in hard-to-staff subjects or specialty areas, such as mathematics, science, English language acquisition, and special education; and

(ii) Retaining highly qualified or effective teachers and principals.

(2) Student achievement (as defined in the Federal Register notice) in each of the schools whose educators would be part of the PBCS is lower than in what the applicant determines are comparable schools in the LEA, or another LEA in its State, in terms of key factors such as size, grade levels, and poverty levels; and

(3) A definition of what it considers a "comparable" school for the purposes of paragraph (2) of this selection criterion is established.

Strengths:

The applicant provides demographic data, poverty data, school size, grade levels, and student/school performance data to support the need for the proposed project in these 12 high-needs schools. (pp. 1-3; 13-17)

The applicant provides a definition of "comparable" for the purposes of identifying high needs schools. The definition includes size of school, grade levels, percentages of free and reduced lunch, minority makeup, and student growth composite. This is done both in a narrative format and with charts identifying the characteristics of each targeted school. (pp. 13-17; 19)

The applicant indicates that turnover rates for first year teachers in the high needs schools is 10%. It increases to 16.4% in Year 2 and in the 3rd year it is 16.1%. Principals have turned over at least once in 11 of the 12 targeted schools since 2006, and two of the schools have turned over twice since then. There is a sign-on bonus for recruitment of principals to fill positions in high needs schools to address this need. (pp. 10-12)

Weaknesses:

There are no weaknesses noted for these criteria.

Reader's Score: 10

Selection Criteria - Project Design**1.(B): Project design (60 points)**

In determining the quality of the design of the proposed project, the Secretary will consider the extent to which the proposed PBCS--

(1) Is part of a proposed LEA or statewide strategy, as appropriate, for improving the process by which each participating LEA rewards teachers, principals, and other personnel (in those sites in which the grantee wishes to expand the PBCS to additional staff in its schools) in high-need schools (as defined in the Federal Register notice) based upon their effectiveness as determined in significant part by student growth (as defined in the Federal Register notice). With regard to the effectiveness of teachers, principals, and other personnel, the Secretary will consider whether--

(i) The methodology the LEA or SEA proposes to use in its PBCS to determine the effectiveness of a school's teachers, principals, and other personnel (in those sites in which the grantee wishes to expand the PBCS to additional staff in its schools) includes valid and reliable measures of student growth (as defined in the Federal Register notice);

(ii) The participating LEA would use the proposed PBCS to provide performance awards to teachers, principals, and other personnel (in those sites in which the grantee wishes to expand the PBCS to additional staff in its schools) that are of sufficient size to affect the behaviors of teachers, principals, and other personnel and their decisions as to whether to go to, or remain working in, the high-need school; and

(iii) The applicant provides a clear explanation of how teachers, principals, and other personnel (in those sites in which the grantee wishes to expand the PBCS to additional staff in its schools) are determined to be "effective" for the purposes of the proposed PBCS.

(2) Has the involvement and support of teachers, principals, and other personnel (in those sites in which the grantee wishes to expand the PBCS to additional staff in its schools), including input from teachers, and principals, and other personnel in the schools and LEAs to be served by the grant, and the involvement and support of unions in participating LEAs where they are the designated exclusive representatives for the purpose of collective bargaining that is needed to carry out the grant;

(3) Includes rigorous, transparent, and fair evaluation systems for teachers and

principals that differentiate levels of effectiveness using multiple rating categories that take into account data on student growth (as defined in the Federal Register notice) as a significant factor, as well as classroom observations conducted at least twice during the school year;

(4) Includes a data-management system, consistent with the LEA's proposed PBCS, that can link student achievement (as defined in the Federal Register notice) data to teacher and principal payroll and human resources systems; and

(5) Incorporates high-quality professional development activities that increase the capacity of teachers and principals to raise student achievement (as defined in the Federal Register notice) and are directly linked to the specific measures of teacher and principal effectiveness included in the PBCS.

Strengths:

The applicant has described a comprehensive, high quality professional development plan that can increase the capacity of teachers and principals to raise student achievement and focuses on valid and reliable measures of student growth. (pp. 24-25; 31-40)

The proposed PBCS plan is an integral part of the district's plan, as well as a statewide strategy, to improve the process by which teachers, principals, and other personnel in high needs schools are rewarded for effective practice, based significantly on student academic growth, multiple objective observation-based data, a teacher portfolio, and professional development. The use of multiple evaluation instruments ensures inter-rater reliability. (pp. 31-40)

The methodology of the EVAAS value-added assessment system includes valid and reliable measures of student growth over time. This is an appropriate system to link teacher effectiveness to student academic achievement. (pp. 24-25)

The proposed PBCS and evaluation system for teachers is rigorous, transparent and fair with differentiated levels of effectiveness using multiple rating categories including value-added assessments of student growth, multiple observations, and a teaching portfolio with artifacts. The applicant provides detailed charts indicating the value of each of the components as it relates to the differentiated incentives. (pp. 22-41)

Weaknesses:

The applicant does not provide strong evidence of involvement and support of teachers. There is no letter of support included from the union or a teacher representative. (Appendix e0-e9)

Although the evaluation manual is included in the appendices, the applicant does not clearly describe or provide details of the evaluation process for principals. (pp. 29; Appendices)

The applicant states that it will strive to measure teacher effectiveness in order to inform decisions about teacher retention and tenure both during and after the duration of the project, but it does not provide details on the role that the evaluation will be play in this process. (pp. 10-11)

The applicant does not provide a clear explanation of how teachers, principals and other personnel will be determined to be "effective" for the purposes of differentiated compensation. (pp. 24-25)

The applicant describes the criteria that will need to go into the creation of a data management system, but does not address how that system will interface and align with the existing payroll and human services. (pp. 29-30)

Reader's Score: 50

Selection Criteria - Adequacy of Support for the Proposed Project

1.(C): Adequacy of Support for the Proposed Project (25 points):

In determining the adequacy of the support for the proposed project, the Secretary considers the extent to which--

- (1) The management plan is likely to achieve the objectives of the proposed project on time and within budget, and includes clearly defined responsibilities and detailed timelines and milestones for accomplishing project tasks;
- (2) The project director and other key personnel are qualified to carry out their responsibilities, and their time commitments are appropriate and adequate to implement the project effectively;
- (3) The applicant will support the proposed project with funds provided under other Federal or State programs and local financial or in-kind resources; and
- (4) The requested grant amount and project costs are sufficient to attain project goals and reasonable in relation to the objectives and design of the project.

Strengths:

The applicant provides resumes and biographies that indicate that the key project personnel are qualified and have the necessary experience to successfully implement the proposed project. For example, the Project Director has experience implementing programs and has over 13 years of intervention leadership experience. (pp. 51-53)

The applicant has provided sufficient detail as to how it will support the proposed project with funds provided under other federal or state programs and local financial or in-kind resources. In addition, the applicant provides evidence that the management plan has the potential to achieve the objectives of the proposed project on time and within the budget framework. (pp. 47-52; 54-55; Budget Narrative 1-8)

The requested grant amount and project costs are sufficient to attain project goals and reasonable in relation to the objectives and design of the project. (Budget Narrative)

Weaknesses:

While the implementation timeline indicates benchmarks and responsibilities of those who will carry out the tasks, it is broadly explained in terms of yearly milestones instead of a detailed month by month implementation plan. (pp. 47-52)

The management plan did not indicate the time commitment for key personnel, including the Project Director. (pp. 52-54; No page found)

Reader's Score: 20

Selection Criteria - Quality of Local Evaluation

1.(D) Quality of Local Evaluation (5 points):

In determining the quality of the local project evaluation, the Secretary considers the extent to which the applicant's evaluation plan--

(1) Includes the use of strong and measurable performance objectives (that are clearly related to the goals of the project) for raising student achievement (as defined in the Federal Register notice), increasing the effectiveness of teachers, principals, and other personnel (in those sites in which the grantee wishes to expand the PBCS to additional staff in its schools), and retaining and recruiting effective teachers, principals, and other personnel;

(2) Will produce evaluation data that are quantitative and qualitative; and

(3) Includes adequate evaluation procedures for ensuring feedback and continuous improvement in the operation of the proposed project.

Strengths:

The evaluation plan includes both qualitative and quantitative data measures. Commercial, standardized, and value-added assessments will be used to measure student growth. The applicant indicates that in the event that they do not receive a successful review of this proposed TIF project, randomly selected paired schools will be used so that half will participate in PBCS and the other half will be designated as comparison schools. Strong and measurable performance objectives for improving student achievement that will increase the effectiveness of teachers, principals, and other personnel are described. The applicant also provides an evaluation component for the retention and recruitment initiatives that will bring/keep effective teachers, principals and other personnel in classrooms in high need schools, and in hard-to-staff subject area positions. (pp. 56-57)

Weaknesses:

The applicant does not provide specific details of data collection, analyses or how feedback will be used for continuous improvement. (pp. 56-58)

The applicant does not identify an evaluator, although they provide a brief description of the position of evaluation analyst. This problematic because the evaluator should be identified at this point in the design plan to effectively understand and determine data collection processes. (p. 54; No page found)

Reader's Score: 3

Priority Questions

Priority Preference - Competitive Preference Priority 1

1.Competitive Preference Priority: Use of Value-Added Measures of Student Achievement. (Up to 5 points):

To meet this competitive preference priority, the applicant must demonstrate, in its application, that the proposed PBCS for teachers, principals, and other personnel (in those sites in which the grantee wishes to expand the PBCS to additional staff in its schools) will use a value-added measure of the impact on student growth (as defined in the Federal Register notice) as a significant factor in calculating differentiated levels of compensation provided to teachers, principals, and other personnel (in those sites in which the grantee wishes to expand the PBCS to additional staff in its schools).

Under this priority, the applicant must also demonstrate that it has a plan to ensure that, as part of the PBCS, it has the capacity to (1) implement the proposed value-added

model (e.g., through robust data systems that collect the necessary data and ensure data quality), and (2) clearly explain the chosen value-added model to teachers to enable them to use the data generated through the model to improve classroom practices.

Strengths:

The applicant describes a robust model of value-added assessment which includes student growth as a significant component to be incorporated into the proposed PBCS project. The district already has a value-added model in place. The linking of the value-added data to PBCS is the proposed next step. The applicant also provides a process to clearly explain the model to teachers to enable them to use the data generated through the model to improve classroom practices. (pp. 8; 9; 11)

Weaknesses:

There are no weaknesses noted for these criteria.

Reader's Score: 5

Priority Preference - Competitive Preference Priority 2

1. Competitive Preference Priority: Increased Recruitment and Retention of Effective Teachers to Serve High-Need Students and in Hard-to-Staff Subjects and Specialty Areas in High-Need Schools. (Up to 5 points):

To meet this competitive preference priority, the applicant must demonstrate in its application that its proposed PBCS is designed to assist high-need schools (as defined in the Federal Register notice) to (1) serve high-need students (as defined in the Federal Register notice), (2) retain effective teachers in teaching positions in hard-to-staff subjects and specialty areas, such as mathematics, science, special education, and English language acquisition, and (3) fill vacancies with teachers of those subjects or specialty areas who are effective or likely to be effective. The applicant must provide an explanation for how it will determine that a teacher filling a vacancy is effective or likely to be effective. In addition, applicants must demonstrate, in their applications, the extent to which the subjects or specialty areas they propose to target are hard-to-staff. Lastly, applicants must demonstrate, in their applications that they will implement a process for effectively communicating to teachers which of the LEA's schools are high-need and which subjects and specialty areas are considered hard-to-staff.

Strengths:

The applicant demonstrates that the proposed PBCS project serves high needs students in high needs schools. This is supported by data regarding poverty, minority makeup, and academic achievement. (pp. 10-11)

The applicant proposes a \$10,000 sign-on bonus for teachers to serve in the hard-to-staff positions of mathematics, science, English language acquisition, and special education who commit to teach at the school for the upcoming year, complete the required professional development, and the change assessment prior to the start of the school year. (pp. 21-23)

The applicant demonstrates that the proposed positions of mathematics, science, English as a Second Language, and special education are hard-to-staff. Anecdotal data on the turnover for these positions is provided. (p.12)

The applicant describes a plan for recruitment and retention of teachers who commit to teach in high needs schools for the upcoming year. A \$10,000 sign-on bonus will be provided to teachers who commit to teach in the identified schools, complete required

professional development, and complete the required change assessment prior to the start of the school year. The applicant provides a chart to illustrate the foundation of the proposed bonus pay plan. For the first 2 years, incentive payments will be made for evidencing student growth that is one standard or more above the state average. For the second 2 years, this increases to one and one half a standard error. (pp. 21-23)

Weaknesses:

The applicant does not describe how it will determine if a teacher filling a vacancy is effective or likely to be effective in high needs schools or in the identified hard-to-staff positions. (No page found)

The applicant does not describe a process for effectively communicating to teachers which of the Winston-Salem/Forsyth County Schools are high need and which subjects and specialty areas are considered to be hard-to-staff. (No page found)

Reader's Score: 3

Status: Submitted

Last Updated: 8/6/10 4:09 PM

Status: Submitted

Last Updated: 8/6/10 4:09 PM

Technical Review Coversheet

Applicant: Winston-Salem/Forsyth County Schools -- Instructional Services, School Improvement (S385A100114)

Reader #3: *****

Points Possible Points Scored

Questions

Evaluation Criteria

Absolute Priority 1

1. Absolute Priority 1	0	0
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Absolute Priority 2

1. Absolute Priority 2	0	0
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Sub Total	0	0
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Evaluaton Criteria

Absolute Priority 3

1. Absolute Priority 3	0	0
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Sub Total	0	0
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Requirement

Requirement

1. Requirement	0	0
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Sub Total	0	0
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Evaluation Criteria

Core Element 1

1. Core Element 1	0	0
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Core Element 2

1. Core Element 2	0	0
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Core Element 3

1. Core Element 3	0	0
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Core Element 4

1. Core Element 4	0	0
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Core Element 5

1. Core Element 5	0	0
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High Quality Professional Development

1. Professional Development	0	0
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Sub Total	0	0
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Selection Criteria

Need for the Project

1. Need for Project	10	10
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Project Design

1.Project Design	60	50
Adequacy of Support for the Proposed Project		
1.Adequacy of Support	25	18
Quality of Local Evaluation		
1.Quality of Local Eval.	5	3
Sub Total	100	81

Priority Questions

Priority Preference

Competitive Preference Priority 1

1.Competitive Priority 1	5	3
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Competitive Preference Priority 2

1.Competitive Priority 2	5	3
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Sub Total	10	6
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Total	110	87
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Technical Review Form

Panel #10 - Panel - 10: 84.385A

Reader #3: *****

Applicant: Winston-Salem/Forsyth County Schools -- Instructional Services, School Improvement
(S385A100114)

Questions

Evaluation Criteria - Absolute Priority 1

1. Priority 1: Differentiated Levels of Compensation for Effective Teachers and Principals:

Comment on how well the applicant demonstrates that --

It will develop and implement a PBCS that rewards, at differentiated levels, teachers and principals who demonstrate their effectiveness by improving student achievement (as defined in the Federal Register notice) as part of the coherent and integrated approach of the local educational agency (LEA) to strengthening the educator workforce.

In determining teacher and principal effectiveness as part of the PBCS, the LEA - -

- (a) Must give significant weight to student growth (as defined in the Federal Register notice), based on objective data on student performance;
- (b) Must include observation-based assessments of teacher and principal performance at multiple points in the year, carried out by evaluators trained in using objective evidence-based rubrics for observation, aligned with professional teaching standards; and, if applicable, as part of the LEA's coherent and integrated approach to strengthening the educator workforce; and
- (c) May include other measures, such as evidence of leadership roles (as defined in the Federal Register notice), that increase the effectiveness of other teachers in the school or LEA.

In determining principal effectiveness as part of a PBCS, the LEA must give significant weight to student growth (as defined in the Federal Register notice) and may include supplemental measures such as high school graduation and college enrollment rates. In addition, the applicant must demonstrate that the differentiated effectiveness incentive payments will provide incentive amounts that are substantial and provide justification for the level of incentive amounts chosen. While the Department does not propose a minimum incentive amount, the Department encourages applicants to be thorough in their explanation of why the selected incentive amounts are likely high enough to create change in the behavior of current and prospective teachers and principals in order to ultimately improve student outcomes.

General:

The applicant has developed a differentiated compensation plan where incentives are provided based upon different components. This program does use student scores in a significant way in determining compensation. This applicant uses a tiered plan that rewards participants for school-level and grade-level performance increases. In order to receive a payout the students must score one standard deviation above state averages. Partial attainment of this goal does not provide partial payout in the incentive category so that the tiers are all or nothing categories. The plan does include observation-based assessments that should occur twice a year once the evaluation rubric is developed. There are some leadership roles provided. The incentive amounts seem sufficient to motivate participants.

Reader's Score: 0

Evaluation Criteria - Absolute Priority 2

1. Priority 2: Fiscal Sustainability of the Performance-Based Compensation System (PBCS):

Comment on how well the applicant demonstrates that - -

(a) The applicant has projected costs associated with the development and implementation of the PBCS, during the project period and beyond, and has accepted the responsibility to provide such performance-based compensation to teachers, principals, and other personnel (in those sites in which the grantee wishes to expand the PBCS to additional staff in its schools) who earn it under the system; and

(b) The applicant will provide from non-TIF funds over the course of the five-year project period an increasing share of performance-based compensation paid to teachers, principals, and other personnel (in those sites in which the grantee wishes to expand the PBCS to additional staff in its schools) in those project years in which the LEA provides such payments as part of its PBCS.

General:

The applicant does promise to provide an increasing contribution over time in this grant. However, the costs projections associated with this plan are preliminary and do not go all the way to commit funds beyond what TIF provides. The applicant does provide a rationale for how they might pay for this program from other funds, but the application is not clear on the specific funding mechanisms or on the specific contribution to the incentives.

Reader's Score: 0

Evaluation Criteria - Absolute Priority 3

1. Priority 3: Comprehensive Approaches to the Performance-Based Compensation System:

Comment on how well the applicant demonstrates that - -

The proposed PBCS is aligned with a coherent and integrated strategy for strengthening the educator workforce, including in the use of data and evaluations for professional development and retention and tenure decisions in the LEA or LEAs participating in the project during and after the end of the TIF project period.

General:

The proposal has many elements of a coherent strategy. It uses an established framework and suggests partner organizations (Mathematica, McREL) may support the project team. It is integrated with some existing efforts at strengthening the workforce. However, the project does not seem fully supported and so there are questions about the extent to which it can be integrated in the operations of the district. The application does not provide sufficient details on the support in the program for retention and especially tenure decisions, although these decisions are mentioned specifically (p.10) as a goal of the project.

Reader's Score: 0

Requirement - Requirement

1. REQUIREMENT: Comment on the quality of the applicant's description of how its proposed PBCS will provide educators with incentives to take on additional responsibilities and leadership roles (as defined in the Federal Register notice).

General:

The proposed program does provide incentives for teachers to take on additional leadership roles. It does provide opportunities for principals to take on increased responsibilities, but does not provide incentives for new roles for principals.

Reader's Score: 0

Evaluation Criteria - Core Element 1

1.Core Element 1:

Comment on the quality of the applicant's plan for effectively communicating to teachers, administrators, other school personnel, and the community at-large the components of its performance based compensation system.

General:

The application discusses a proposed communication plan. This is one area of great concern given that the initial support for this program from stakeholders is not described in the application. The application does describe the way the communication plan will be part of an integrated continuous improvement program.

Reader's Score: 0

Evaluation Criteria - Core Element 2

1.Core Element 2:

Comment on the quality of the applicant's involvement and support of teachers, principals, and other personnel (including input from teachers, principals, and other personnel in the schools and LEAs to be served by the grant) and the involvement and support of unions in participating LEAs (where they are the designated exclusive representatives for the purpose of collective bargaining) that is needed to carry out the grant.

General:

The applicant has demonstrated a credible interest in involving teachers, principals, and other stakeholders in the program. They have secured letters from within their organization, the state education office, and participating schools. There is no support from unions and there are indications in many parts of the proposal that this applicant has additional work to do (see p.26 for examples) in order to secure important support from all the stakeholders who are critical for the success of a program of this size.

Reader's Score: 0

Evaluation Criteria - Core Element 3

1.Core Element 3:

Comment on the quality of the applicant's implementation, or plan to implement, a rigorous, transparent, and fair evaluation systems for teachers and principals that differentiate effectiveness using multiple rating categories that take into account student growth (as defined in the Federal Register notice) as a significant factor, as well as classroom observations conducted at least twice during the school year. The evaluation process must: (1) use an objective, evidence-based rubric aligned with professional teaching or leadership standards and the LEA's coherent and integrated

approach to strengthening the educator workforce; (2) provide for observations of each teacher or principal at least twice during the school year by individuals (who may include peer reviewers) who are provided specialized training; (3) incorporate the collection and evaluation of additional forms of evidence; and (4) ensure a high degree of inter-rater reliability (i.e., agreement among two or more raters who score approximately the same).

General:

The applicant has a plan to implement a rigorous evaluation system. This system will build upon some prior work and is aligned with some other district initiatives. Student growth accounts for a significant portion of the evaluation (p22-25). Classroom observations are planned for twice a year (p.25). A current statewide initiative already requires less frequent evaluations. The applicant plans to use a rubric developed by NWEA and the application tends to delegate the details of the rubric to that program rather than being specific in its text (p25). The applicant promises to collect a range of evidence to support the evaluations and commits to using trained evaluators and achieving a high-degree of inter-rater reliability although the specific details on the evidence and the rater approach are not provided.

Reader's Score: 0

Evaluation Criteria - Core Element 4

1.Core Element 4:

Comment on the quality of the applicant's implementation or plan to implement, a data-management system that can link student achievement (as defined in the Federal Register notice) data to teacher and principal payroll and human resources systems.

General:

The data management system is proposed rather than existing and the applicant does provide a schematic illustrating how some technical components would be linked (p.31, 31). However, there are concerns about the adequacy of the software the district plans to build this system on in terms of its support for multi-user, multi-site access with data integrity. There are also concerns that the applicant is not able to show that the core operational data systems in the district can be used to support these critical functions leading to questions about whether this element will be fully integrated into the district's infrastructure.

Reader's Score: 0

Evaluation Criteria - Core Element 5

1.Core Element 5:

Comment on the quality of the applicant's plan for ensuring that teachers and principals understand the specific measures of teacher and principal effectiveness included in the PBCS, and receive professional development that enables them to use data generated by these measures to improve their practice.

General:

The applicant has described a professional development plan that includes training on specific measures used in this program. It is weak on the communication/training regarding all elements of the PBCS. This plan describes the standards that the applicant plans to tie this professional development to. The applicant is also drawing upon impressive potential partners to support this function. While more details would be helpful, the applicant has addressed the important parts of this core element in an impressive way.

Reader's Score: 0

Evaluation Criteria - High Quality Professional Development

1. High Quality Professional Development:

Comment on the applicant's demonstration that ---

Its proposed PBCS will include a high-quality professional development component for teachers and principals consistent with the definition of the term professional development in section 9101(34) of the ESEA. The applicant must demonstrate that its PBCS has a professional development component in place, or a specific plan for developing one, that is directly linked to the specific measures of teacher and principal effectiveness included in the PBCS. The professional development component of the PBCS must - -

(1) Be based on needs assessed either at the high-need schools (as defined in the Federal Register notice) participating in the applicant's proposed PBCS or LEA-wide;

(2) Be targeted to individual teacher's and principal's needs as identified in the evaluation process;

(3) Provide --

(a) Those teachers and principals in participating TIF schools who do not receive differentiated compensation based on effectiveness under the PBCS with the tools and skills they need to improve their effectiveness in the classroom or school and be able to raise student achievement (as defined in the Federal Register notice); and

(b) Those teachers and principals who are deemed to be effective and who, therefore, receive differentiated compensation under the PBCS, with the tools and skills they need to (1) continue effective practices in the classroom or school and raise student achievement (as defined in the Federal Register notice), and (2) successfully assume additional responsibilities and leadership roles (as defined in the Federal Register notice);

(4) Support teachers and principals to better understand and use the measures of effectiveness in the PBCS to improve practice and student achievement (as defined in the Federal Register notice); and

(5) Include a process for regularly assessing the effectiveness of this professional development in improving teacher and leadership practice to increase student achievement (as defined in the Federal Register notice) and making modifications necessary to improve its effectiveness.

General:

The professional development aspect of this proposal demonstrates a commitment to preparing educators to deal with data and different forms of measurement. It is differentiated and targeted to individuals with individual training plans (p.37-40). It is also standards-based with the application listing subjects that will be included with the standards they relate to. These help not only clarify the nature of the program, but to see how it is specifically connected to state frameworks. This professional development is available to non-participating educators. Further, it does address the specific measures used in the program. It also does include specific mechanisms for feedback and improvement both for the educator being provided the training and also the professional development system (p.43-44).

Reader's Score: 0

Selection Criteria - Need for the Project

1.(A): Need for the project (10 points):

In determining the need for the proposed project, the Secretary will consider the extent to which the applicant establishes that--

1) The high-need schools (as defined in the Federal Register notice) whose educators would be part of the PBCS have difficulty--

(i) Recruiting highly qualified or effective teachers, particularly in hard-to-staff subjects or specialty areas, such as mathematics, science, English language acquisition, and special education; and

(ii) Retaining highly qualified or effective teachers and principals.

(2) Student achievement (as defined in the Federal Register notice) in each of the schools whose educators would be part of the PBCS is lower than in what the applicant determines are comparable schools in the LEA, or another LEA in its State, in terms of key factors such as size, grade levels, and poverty levels; and

(3) A definition of what it considers a "comparable" school for the purposes of paragraph (2) of this selection criterion is established.

Strengths:

The applicant has demonstrated that the schools in this program serve high-needs students. The issues of need being addressed in this program are not new to the district and the district has been working to address these issues for some time. They have demonstrated that the schools have staff recruitment/retention challenges and include hard-to-staff areas of special education in their Response-to-Intervention component. They have demonstrated an ability to address comparability in their schools.

Weaknesses:

No weaknesses were noted.

Reader's Score: 10

Selection Criteria - Project Design

1.(B): Project design (60 points)

In determining the quality of the design of the proposed project, the Secretary will consider the extent to which the proposed PBCS--

(1) Is part of a proposed LEA or statewide strategy, as appropriate, for improving the process by which each participating LEA rewards teachers, principals, and other personnel (in those sites in which the grantee wishes to expand the PBCS to additional staff in its schools) in high-need schools (as defined in the Federal Register notice) based upon their effectiveness as determined in significant part by student growth (as defined in the Federal Register notice). With regard to the effectiveness of teachers, principals, and other personnel, the Secretary will consider whether--

(i) The methodology the LEA or SEA proposes to use in its PBCS to determine the effectiveness of a school's teachers, principals, and other personnel (in those sites in which the grantee wishes to expand the PBCS to additional staff in its schools) includes valid and reliable measures of student growth (as defined in the Federal Register notice);

(ii) The participating LEA would use the proposed PBCS to provide performance awards to teachers, principals, and other personnel (in those sites in which the grantee wishes to expand the PBCS to additional staff in its schools) that are of sufficient size to affect the behaviors of teachers, principals, and other personnel and their decisions as to whether to go to, or remain working in, the high-need school; and

(iii) The applicant provides a clear explanation of how teachers, principals, and other personnel (in those sites in which the grantee wishes to expand the PBCS to

additional staff in its schools) are determined to be "effective" for the purposes of the proposed PBCS.

(2) Has the involvement and support of teachers, principals, and other personnel (in those sites in which the grantee wishes to expand the PBCS to additional staff in its schools), including input from teachers, and principals, and other personnel in the schools and LEAs to be served by the grant, and the involvement and support of unions in participating LEAs where they are the designated exclusive representatives for the purpose of collective bargaining that is needed to carry out the grant;

(3) Includes rigorous, transparent, and fair evaluation systems for teachers and principals that differentiate levels of effectiveness using multiple rating categories that take into account data on student growth (as defined in the Federal Register notice) as a significant factor, as well as classroom observations conducted at least twice during the school year;

(4) Includes a data-management system, consistent with the LEA's proposed PBCS, that can link student achievement (as defined in the Federal Register notice) data to teacher and principal payroll and human resources systems; and

(5) Incorporates high-quality professional development activities that increase the capacity of teachers and principals to raise student achievement (as defined in the Federal Register notice) and are directly linked to the specific measures of teacher and principal effectiveness included in the PBCS.

Strengths:

The proposed program is part of a LEA strategy that is aligned with state programs and strategies. It has been articulated in its details as largely connected to these state-level programs. The methodology chosen has been in use in the state and appropriately adapted in the plan. The applicant has addressed special education as well as accountability issues within its framework. It provides mechanisms for assessing student growth and, importantly, explaining the student growth measures to teachers and principals. It includes a rigorous teacher evaluation system, administered twice a year, and a clear mechanism for determining effectiveness. The professional development program is well thought out and connected to standards and frameworks.

Weaknesses:

It was difficult to ascertain how some of the program's elements would work in practice. There were multiple indications that this program may still be in the early stages. The all-or-nothing approach to the leveled compensation may work against the goals of this program. The data system component of this program has good elements, but does not represent a solid design at this point. Rather, the data system portion seems to be a collection of different (important) elements in search of some integration. There is no indication of union support for this program either at the teacher or principal level.

Reader's Score: 50

Selection Criteria - Adequacy of Support for the Proposed Project

1.(C): Adequacy of Support for the Proposed Project (25 points):

In determining the adequacy of the support for the proposed project, the Secretary considers the extent to which--

(1) The management plan is likely to achieve the objectives of the proposed project on time and within budget, and includes clearly defined responsibilities and detailed timelines and milestones for accomplishing project tasks;

(2) The project director and other key personnel are qualified to carry out their

responsibilities, and their time commitments are appropriate and adequate to implement the project effectively;

(3) The applicant will support the proposed project with funds provided under other Federal or State programs and local financial or in-kind resources; and

(4) The requested grant amount and project costs are sufficient to attain project goals and reasonable in relation to the objectives and design of the project.

Strengths:

There is a management plan with key activities broken down by year (p.47-50). The project director does seem very well qualified to carry out the responsibilities of this program and the district leadership is both qualified and committed to this effort (p.51-54). There are many qualified staff listed and important partners identified, including a local organization that can provide support for the difficult technical parts of the student assessments and the training in those areas. The applicant proposes in-kind funds to support this program (p.54).

Weaknesses:

The management plan does describe responsibilities, but could have described them at a more granular level. The applicant is not clear on the commitment of funds beyond those provided by TIF.

Reader's Score: 18

Selection Criteria - Quality of Local Evaluation

1.(D) Quality of Local Evaluation (5 points):

In determining the quality of the local project evaluation, the Secretary considers the extent to which the applicant's evaluation plan--

(1) Includes the use of strong and measurable performance objectives (that are clearly related to the goals of the project) for raising student achievement (as defined in the Federal Register notice), increasing the effectiveness of teachers, principals, and other personnel (in those sites in which the grantee wishes to expand the PBCS to additional staff in its schools), and retaining and recruiting effective teachers, principals, and other personnel;

(2) Will produce evaluation data that are quantitative and qualitative; and

(3) Includes adequate evaluation procedures for ensuring feedback and continuous improvement in the operation of the proposed project.

Strengths:

There is an evaluation plan is good and references core elements of the competition. It does a reasonably good job of conveying the seriousness that the applicant takes this issue. It does include both qualitative and quantitative data collection. Student data is included in the evaluation plan.

Weaknesses:

The evaluation plan is short on details. There is no identified evaluation analyst. There are no measures in the evaluation plan section of the application for continuous improvement of the proposed program.

Reader's Score: 3

Priority Questions

Priority Preference - Competitive Preference Priority 1

1. Competitive Preference Priority: Use of Value-Added Measures of Student Achievement. (Up to 5 points):

To meet this competitive preference priority, the applicant must demonstrate, in its application, that the proposed PBCS for teachers, principals, and other personnel (in those sites in which the grantee wishes to expand the PBCS to additional staff in its schools) will use a value-added measure of the impact on student growth (as defined in the Federal Register notice) as a significant factor in calculating differentiated levels of compensation provided to teachers, principals, and other personnel (in those sites in which the grantee wishes to expand the PBCS to additional staff in its schools).

Under this priority, the applicant must also demonstrate that it has a plan to ensure that, as part of the PBCS, it has the capacity to (1) implement the proposed value-added model (e.g., through robust data systems that collect the necessary data and ensure data quality), and (2) clearly explain the chosen value-added model to teachers to enable them to use the data generated through the model to improve classroom practices.

Strengths:

The applicant has demonstrated an understanding of value-added modeling and integrated some important core components for this part of the program to be successful, including professional development.

Weaknesses:

The applicant lacks the infrastructure currently and has not presented a solid plan for building the infrastructure necessary to support the data requirements of this aspect of the program. The application is not clear on how it connects the value-added data to classroom practice.

Reader's Score: 3

Priority Preference - Competitive Preference Priority 2

1. Competitive Preference Priority: Increased Recruitment and Retention of Effective Teachers to Serve High-Need Students and in Hard-to-Staff Subjects and Specialty Areas in High-Need Schools. (Up to 5 points):

To meet this competitive preference priority, the applicant must demonstrate in its application that its proposed PBCS is designed to assist high-need schools (as defined in the Federal Register notice) to (1) serve high-need students (as defined in the Federal Register notice), (2) retain effective teachers in teaching positions in hard-to-staff subjects and specialty areas, such as mathematics, science, special education, and English language acquisition, and (3) fill vacancies with teachers of those subjects or specialty areas who are effective or likely to be effective. The applicant must provide an explanation for how it will determine that a teacher filling a vacancy is effective or likely to be effective. In addition, applicants must demonstrate, in their applications, the extent to which the subjects or specialty areas they propose to target are hard-to-staff. Lastly, applicants must demonstrate, in their applications that they will implement a process for effectively communicating to teachers which of the LEA's schools are high-need and which subjects and specialty areas are considered hard-to-staff.

Strengths:

The applicant has proposed a substantial signing bonus for hard-to-staff areas (p. 11). They also plan to use their incentive program to retain qualified teachers in these areas.

Weaknesses:

Beyond a financial incentive, there is little discussion of specific recruitment strategies. The incentive is one-time with a low teaching requirement. The application is not clear on how it will evaluate the effectiveness of potential teachers.

Reader's Score: 3

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