Level 4 Review of District Systems and Practices Protocol 2010

Massachusetts Department of Elementary & Secondary Education (ESE)
Division of Accountability, Partnership & Assistance
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Overview

Purpose:
The Center for District and School Accountability (DSA) in the Department of Elementary and Secondary Education (ESE) conducts district reviews under Chapter 15, Section 55A of the Massachusetts General Laws. Districts declared "underperforming" by the Board of Elementary and Secondary Education (Board) and placed on turnaround plans will be reviewed periodically as determined by ESE. The purpose of this review of Level 4 districts is to provide the Department and the Board with information allowing them to assess the extent to which the district has strengthened its systems since the implementation of its turnaround plan, in order to determine future ESE assistance and intervention.

Key Questions:
Four overarching key questions guide the work of the review team in these reviews.

1. How has the district addressed the issues that placed it in Level 4?
2. Is student achievement on the rise?
3. Do the district and schools have strong systems and practices in place?
4. Has the district built the capacity to maintain continuous improvement on its own, without continued ESE Targeted Assistance support and intervention?

Methodology:
The review will use former district review reports, the district's turnaround plan, an analysis of the district's current systems and practices, and district and student data in order to assess the district's progress and its capacity to sustain improvements. To focus the analysis, reviews will collect evidence for each of the Key Questions (see section on Findings under **Writing the Report**). To answer Key Question 3, reviews will collect evidence for each of the six standards to be reviewed: **Leadership and Governance, Curriculum and Instruction, Assessment, Human Resources and Professional Development, Student Support, and Financial and Asset Management**. (See Appendix H.) Team members will preview selected district documents and ESE data and reports before conducting a four-day site visit to the district and schools. The team will consist of independent consultants with expertise in each of the standards**.**

Reports:
Reports will include a description of the **district context and background**, **demographic and student achievement data**, and **findings and recommendations**.

The Review Process

Review team:
The review teams will be made up of independent consultants, usually 4-6 to a team. Each consultant will have expertise in the standard to which he or she is assigned. All team members will receive training in this protocol.

Preparation for the review:
Before the site visit, the team will review documents provided by the district and information on the district provided by ESE. This will help them prepare thoughtful questions for interviews and focus groups. On two days before each site visit, the team will meet at ESE to review documents, sort evidence, and prepare questions.

Site visits:
- Days 1 and 2 will focus primarily on district interviews and document review.
- Days 3 and 4 will focus primarily on school visits, classroom observations, teacher team meetings, and focus groups with teachers and parents.

The Department and review team coordinators will work collaboratively with the district to establish a specific schedule for the site visit that meets the needs of the district and its schools, to the extent possible. What works for one district may not work for another.

The site visit will begin with an introductory meeting with key district leaders. This informal meeting will give the district a chance to give an overview of its approach to implementing the turnaround plan and other steps it has taken to accelerate the district's progress since the district was placed in Level 4. The site visit will culminate with a final meeting that will provide the district with an overview of the team's evidence and emerging themes from the visit.

During the site visit a series of interviews and focus groups will be conducted to gather information. The various interviews and focus groups are listed on the sample Site Visit Schedule, below; questions are based on the Key Questions. (For more detail, see section on Findings under **Writing the Report**).The purpose of interviews and focus groups at schools is to understand the impact of district systems and practices on their staff, students, and parents as the district has implemented its turnaround plan.

The district liaison will work to establish an appropriate schedule for school visits and set up focus groups that are appropriately composed. The liaison should work with principals to schedule times for principal interviews and teacher team meetings. The school may propose a classroom observation schedule; in any case, some observations may be random.

The review team will request access to personnel files for the purpose of assessing Human Resources and Professional Development Indicator 2, Supervision and Evaluation. Also, as the site visit progresses, the review team may request follow-up interviews to ask questions that emerge after focus groups, classroom observations, etc. These follow-up interviews will be conducted with whoever the appropriate person is to answer the questions that have emerged. This will be the team's opportunity to make sure that the evidence it gathers is complete.

NOTE: *Focus groups should include no more than eight individuals to the extent possible. With the exception of meetings with leadership teams, supervising staff should not be scheduled in focus groups with those under their supervision.*

2009-2010 CDSA Sample Site Visit Schedule

(A more detailed version for the district to use to fill in locations, names and titles of interviewees, etc. will be placed in the district's dropbox.)

Day 1

Location 1:	**Team workroom**	**Location 2:**	**Meeting room at central office (for 6-8)**	**Location 3:**	**Another meeting room at central office**
Time	***Activity***	***Time***	***Activity***	***Time***	***Activity***
8:00-8:15	**Review Team Meeting**				
8:15-9:15	**Orientation with District Leadership Team**				
9:30-11:00	**Review of Documents**	9:30-11:00	**Leadership & Governance Interview**	9:30-11:00	**Curriculum & Instruction Interview**
11:00-11:30	**Review Team Meeting**				
11:30-12:15	**Lunch Meeting**				
12:15-1:45	**Review of Documents**	12:15-1:45	**Leadership & Governance Interview**	12:15-1:45	**HR & PD Interview**
1:45-2:15	**Review Team Meeting**				
2:15-3:30	**Review of Documents**	2:15-3:30	**Student Support Interview**	2:15-3:30	**Assessment Interview**
3:00-3:30	**Review Team Meeting**				
3:30-4:30	**Review of Documents**				

Notes:

1. At some point during the review, the RTM focusing on finance will need to "test" payroll and purchasing. Arrangements will be made on site.
2. Arrangements will also be made to interview the district's turnaround partners and monitors, including ESE staff and contracted vendors.

Sample Site Visit Schedule
Day 2

Location 1:	**Team workroom/ selected classrooms**	**Location 2:**	**Meeting room at central office (for 6-8)**	**Location 3:**	**Another meeting room at central office**
Time	***Activity***	***Time***	***Activity***	***Time***	***Activity***
8:00-830	**Review Team Meeting**				
8:30-10:00	**Classroom visits**	8:30-10:00	**Financial & Asset Management Interview (District personnel)**	8:30-10:00	**Leadership & Governance Interview**
10:00-10:30	**Review Team Meeting**				
10:30-12:00	**Classroom visits**	10:30-12:00	**Curriculum & Instruction Interview**	10:30-12:00	**Student Support Interview**
12:00-12:30	**Lunch Meeting**				
12:30-1:00	**Review Team Meeting**				
1:00-2:30	**Classroom visits**	1:00-2:30	**HR & PD Interview**	1:00-2:30	**Financial & Asset Management Interview (District personnel)**
2:30-3:00	**Review Team Meeting**				
3:00-4:00	**Review of Personnel Files**	3:00-4:00 (flex time to meet district needs)	**Teachers Association Representative(s) Interview**	3:00-4:00 (flex time to meet district needs)	**School Council Parent Members Focus Group**
4:00-4:30	**Review Team Meeting**				

Notes:

1. At some point during the review, the RTM focusing on finance will need to "test" payroll and purchasing. Arrangements will be made on site.
2. Arrangements will also be made to interview the district's turnaround partners and monitors, including ESE staff and contracted vendors.

Sample Site Visit Schedule
Day 3

Location 1:	**Team workroom/ selected classrooms/ location for focus group**	**Location 2:**	**Meeting room at central office (for 6-8)/ selected classrooms**	**Location 3:**	**Another meeting room at central office/ location for focus group**
Time	***Activity***	***Time***	***Activity***	***Time***	***Activity***
8:00-8:30	**Review Team Meeting**				
8:30-10:00	**Classroom visits**	8:30-10:00	**Classroom visits**	8:30-10:00	**Student Support Interview**
10:00-10:30			**Travel Time**		
10:30-12:00	**Classroom visits**	10:30-12:00	**Classroom visits**	10:30-12:00	**Financial & Asset Management Interview (<u>Town or City personnel</u>)**
12:00-12:30	**Lunch Meeting**				
12:30-1:00	**Review Team Meeting**				
1:00-2:30	**Classroom visits**	1:00-2:30	**Curriculum & Instruction Interview**	1:00-2:30	**Assessment Interview**
2:30-3:00	**Review Team Meeting**				
3:00-4:00 (flex time to meet district needs)	**Teacher Focus Group Elementary**	3:00-4:00 (flex time to meet district needs)	**Teacher Focus Group Middle**	3:00-4:00 (flex time to meet district needs)	**Teacher Focus Group High School**
4:00-4:30	**Review Team Meeting**				
		4:30 -5:30 (flex time to meet district needs)	**School Committee Interview** (Members will be interviewed in subquorum groups.)	4:30 -5:30 (flex time to meet district needs)	**School Committee Interview** (Members will be interviewed in subquorum groups.)

Notes:

1. At some point during the review, the RTM focusing on finance will need to “test” payroll and purchasing. Arrangements will be made on site.
2. Arrangements will also be made to interview the district’s turnaround partners and monitors, including ESE staff and contracted vendors.

Sample Site Visit Schedule
Day 4

Location 1:	Team workroom/ selected classrooms/ location for focus group	Location 2:	Selected classrooms	Location 3:	Meeting room at central office/ selected classrooms
Time	***Activity***	***Time***	***Activity***	***Time***	***Activity***
8:00-10:00	**Classroom visits**	8:00-10:00	**Classroom visits**	8:00-10:00	**Assessment Interview**
10:00-11:00	**Classroom visits**	10:00-11:00	**Classroom visits**	10:00-11:00	**Classroom visits**
11:00-11:30	**Review Team Meeting**				
11:30-12:00	**Lunch Meeting**				
12:00-1:30	**Classroom visits**	12:00-1:30	**Classroom visits**	12:00-1:30	**Follow-Up Interviews**
1:30-2:00	**Review Team Meeting**				
2:00-3:00	**Final Review of Documents**			2:00-3:00	**Leadership & Governance Interview**
3:00-3:30	**Closing Meeting**				
3:30-4:00	**Review Team Meeting**				

Notes:

1. At some point during the review, the RTM focusing on finance will need to "test" payroll and purchasing. Arrangements will be made on site.
2. Arrangements will also be made to interview the district's turnaround partners and monitors, including ESE staff and contracted vendors.

Review team activities during district and school visits:

Activities	Description
Orientation meeting	District will have a chance, informally, to give an overview of its approach to implementing the turnaround plan and other steps it has taken to accelerate the district's progress since being placed in Level 4.
Document review	The team will review materials that the district provides on site, including personnel files.
Interviews with district leaders	Superintendent, assistant superintendent(s), curriculum supervisors at the district and department levels, chief financial officer, controller or purchasing director, HR director, and/or special education director.
School committee interviews	All committee members should be invited. The review team will try to accommodate the schedule for the committee members who attend. Committee members will be interviewed in subquorum groups.
Interview with municipal leaders	The mayor(s) or town manager(s) of the school district community or communities. Members of the finance committee(s) may also be invited.
Interview with teacher union leadership	The president should be invited. The president may delegate this responsibility and may choose to include others.
Interviews with school leaders	School leaders include the principal and may also include key assistants (e.g., assistant principals, curriculum director, and/or lead teachers).
Teacher focus group	Groups of teachers, typically representing all grade levels**,** make up focus groups. All teachers should be invited. The focus group(s) will be scheduled so that invited teachers may attend after school hours.
Parent focus group	Parents from the school council(s) may be invited.
Classroom visits	Classroom visits will be conducted throughout the school visit. Classroom visits are designed to understand instructional practices and improvement efforts across the school; they are not evaluations of individual teachers. More information is provided in Appendix D.
Teacher team meetings	The team may observe regularly scheduled teacher team meetings. Team members will ask questions only if invited to do so.
Interviews with turnaround partners, monitors	These may be ESE staff or contracted vendors. Time to be arranged.
Closing meeting	The review team coordinator will share with the district what the team has learned on site and what the team is still sorting out.

Evidence collection:

Using a researcher's perspective, the team will gather evidence from multiple sources among the data, documents, interviews, focus groups, observed teacher team meetings, and classroom visits. The evidence should be triangulated: it should come from more than one source. This ensures that the finding is based on sufficient evidence. It is important for team members to suspend their judgment about the district and its schools until after the evidence is triangulated. Notes of interviews, classroom observations, etc., should be objective; subjective notes are not useful. The team will look at the evidence collectively to respond to the Key Questions. For Key Question 3, each team member focuses on at least one of the six standards (see Appendix H). It is important for the team to check for mutual understanding by summarizing, restating, and asking follow-up questions, especially when evidence appears contradictory. The researcher is curious, not skeptical. The researcher endeavors to ensure accuracy and mutual understanding, not to discover a "gotcha." The evidence that the researcher has gathered may or may not contradict district perceptions of district conditions. In the event that such a contradiction presents itself, the review team member has the responsibility to share the evidence collected by the review team and ask the district for its interpretation. The team will endeavor to develop a shared understanding of diverging interpretations. If unable to do so, the team will at least be transparent in acknowledging the difference between district and team perspectives (on site as well as in relevant findings).

Analysis of evidence:

The team collectively analyzes the data gathered by each team member and makes connections among evidence gathered for each Key Question. The team considers the body of evidence in analyzing how the district has addressed the issues that placed it in Level 4, whether student achievement is on the rise, whether the district and schools have strong systems and practices in place, and whether the district has built the capacity to maintain continuous improvement on its own. The team uses its professional judgment in analyzing these questions

Emerging themes:

From this analysis, the team develops emerging themes to share with the district at the end of Day 4. The themes are *not* equivalent to "findings." The team has not yet had sufficient time to sort through all the evidence for each Key Question and consider the full analyses from each team member in order to determine the final set of findings that will appear in the written report. However, in order to ensure transparency, in the closing meeting the review team coordinator will share with the district what the team has learned on site and what the team is still sorting out.

Writing the Report

Process for the report:

- At the end of the site visit, the review team shares emerging themes with the district; it uses these themes as a basis for preliminary findings.
- After the site visit, during its findings development meeting, the review team completes the analysis of information collected during the review and develops preliminary findings. It may begin to discuss possible recommendations at this meeting.
- Using the report template and report template guidance, each review team member takes responsibility for drafting the full text of a set of preliminary findings, based on all notes taken and evidence collected by the entire team during the site visit.
- Each team member brings hard copies of the full text of this set of preliminary findings to the written findings review team meeting following the onsite review; before doing so, they should post their drafts, labeled with version and date, in the CDSA dropbox. Each finding is refined with team feedback to ensure accuracy, consensus, and fulfillment of the requirements for findings stated in the next section. Using the requirements for recommendations two sections below, the team develops recommendations based on Key Question 4.
- Team members revise the drafts as agreed at the written findings review team meeting, adding the recommendations; they post the revised versions in the CDSA dropbox by the time requested.
- The review team coordinator compiles members' drafts into one document before putting it, properly labeled, in the CDSA dropbox by the due date. In compiling the drafts into one document, the review team coordinator makes sure that findings and recommendations written by different members of the team are not unduly repetitive (some overlap is acceptable).
- The Department reviews the draft—drafts that do not meet requirements will be returned to the review team coordinator for revision—and clarifies any questions with the review team coordinator. The Department then sends the draft, without the recommendations, to the district and to the district's turnaround partners and monitors who were interviewed, to review for factual errors. Team members should be available after these factual reviews in case there are any questions about their parts of the report.
- The Department finalizes the report, including the recommendations, sends it to the appropriate personnel in the district, and posts it on its website at http://www.doe.mass.edu/sda/review/district/.

Findings:

- Findings will be organized under Key Questions 1-4.

  Key Question 1: How has the district addressed the issues that placed it in Level 4?
  - District history and reasons the BESE placed it in Level 4.
  - The district's development and approval of the turnaround plan.
  - Main components of the turnaround plan and the district's success in implementing its plan.
  - The district's ability to address issues and unanticipated obstacles not covered in the plan.

  Key Question 2: Is student achievement on the rise?
  - Student achievement trends as measured by the MCAS test.
  - Other student performance indicators such as attendance and graduation.

Key Question 3: Do the district and schools have strong systems and practices in place?

- Leadership and Governance
- Curriculum and Instruction
- Assessment
- Human Resources and Professional Development
- Student Support
- Financial and Asset Management

Key Question 4: Has the district built the capacity to maintain continuous improvement on its own, without continued ESE Targeted Assistance support and intervention?

- What ESE's support and intervention have been and to what extent they have helped the district expand its capacity.
- Description of the district's current capacity to sustain improvement.

- Finding statements should make a single point.
- The number of findings should be determined by the evidence; usually, there should be at least one finding under Key Questions 1, 2, and 4, and at least one finding under each of the six standards under Key Question 3.
- Findings should be priority findings: that is, those that are significant in light of the Key Questions.
- Findings do not need to be listed in priority (rank) order. The strength of the language used in finding statements should be used to demonstrate significance/importance. Instead, under each Key Question, the findings should be in a logical sequence determined by their subject matter. Placement of findings may also be affected by whether they are positive or negative.
- **Each finding statement should be supported by an analysis describing the team's evidence, the impact of the finding, and the team's judgment.**
  - **Evidence** from multiple sources among the data, documents, interviews, focus groups, observed teacher team meetings, and classroom visits. **The analysis** should make connections among the different pieces of evidence used to support the finding statement.
  - **Impact** and significance of the finding for education in the district. The analysis should explain to the reader why this finding is important.
  - Professional **judgment.** The team's judgment concerning answers to the Key Questions.

Recommendations:

- Recommendations will include:
  - Recommendations for the level of ESE's future support and intervention
  - Recommendations for the district's next steps
- The review team develops recommendations based on the district's strengths and challenges and contextual factors identified by the findings, especially its capacity to maintain continuous improvement on its own. Recommendations must be based on the findings and evidence included in the report; describing the evidence leading to the recommendation (see next bullet) will help to ensure that they are.
- For each recommendation, the report will provide a brief explanation, describing the evidence leading to the recommendation and the rationale for it. The description of the evidence and the rationale for the recommendation may be presented in a series of bullets or in a connected

narrative, but whichever method of presentation is chosen should be used for all of the recommendations.

- If the team makes recommendations to continue current systems or practices or to follow through on planned changes, it should make sure to phrase them accordingly in order to acknowledge the district's accomplishments or plans.
- The Department and district will consider the recommendations when making decisions about future assistance and intervention.

Expectations for the Team and District

The review places a value on engaging the district in understanding the impact that the implementation of its turnaround plan has had on its systems and practices. The process is evidence-based and designed to promote learning and improvement. Clear communication among the district, its schools, and the review team is essential to the process. All review team members have extensive experience in the area they are reviewing, are governed by a Code of Conduct (see Appendix C), are objective, and minimize disruption to teaching and learning.

Expectations for the review team coordinator:

- Exhibit the highest professional standards and be responsible for ensuring that the team does so, as well.
- Maintain and post daily team meeting notes.
- Conduct a daily review of the schedule with the team and ensure that all interviews, focus groups and classroom visits are attended and go smoothly.
- Maintain good channels of communication with the district and schools at all times.
- On the first day of the site visit, provide the district with a randomly selected list of teachers whose personnel files the district is to provide for the purposes described in Appendix F.
- Take responsibility for facilitating all team meetings on site.
- Schedule school and classroom visits on site.
- Take responsibility for organizing the team and keeping copies of team notes.
- Keep district and school leaders informed of the team's progress and developing themes throughout the visit.
- Take appropriate actions to follow up on any questions by the team.
- Present the team's emerging themes to district leadership at the end of the visit.
- Write a section of the review report and oversee the writing of the entire report.

Expectations for review team members:

- Before the site visit, read district and school documents and participate in document review and question preparation.
- Arrive punctually for all team meetings and appointments in the district. See outline of review team activities below.
- Participate fully and collegially on teams, take direction from the review team coordinator, and make requests to the district through the review team coordinator.
- Organize notes and additional evidence to share with other team members by the end of each site visit day.
- Complete assigned section of report according to report template guidance.
- Participate in refining the draft of the report, ensuring that it contains sufficient evidence, is accurate, and reflects the consensus of the team.
- Abide by the Code of Conduct for Reviewers in Appendix C.
- Abide by the Guidelines for Classroom Visits (see Appendix D).
- Adhere to deadlines.

Outline of Review Team Activities:

- Document review and question development meeting (two days)
- Site days in district (four days)
- Findings development team meeting (one day)
- Written findings review team meeting (one day)

Expectations for the district:

- Explain the purpose and process of the review to all staff.
- Before the site visit, send the documents requested and work with the coordinator to finalize the schedule.
- Provide confidential team meeting space with Internet access and access to a copier during each day on site.
- Provide a space for each interview (not the team room).
- Welcome the review team and recognize that its efforts are on behalf of its students.
- Work with the review team to ensure that the visit runs smoothly.
- Engage faculty and other stakeholders to reflect on their work.
- Provide the review team coordinator with any additional documents requested, including personnel files.
- Maintain good communication with the review team coordinator throughout the review, conveying any concerns or other feedback from staff.
- Respond frankly to the review team's developing themes and provide additional evidence when necessary.
- After the site visit, invite all participants in the review to complete a brief online survey (to be supplied) to give the Department feedback on the review process.

Appendix A: Checklist of Data/Documents Provided by ESE

(including information previously submitted to ESE by the district)

Documents to be provided by ESE before the site visit	
1. District Profile Data	
2. Comprehensive Annual District and School Data Review* (when it becomes available) *See definition in Appendix G.	
3. District Turnaround Plan	
4. District Progress Reports to ESE on the Turnaround Plan	
5. ESE Monitoring Reports related to the Turnaround Plan	
6. Latest Coordinated Program Review Report or follow-up Mid-cycle Report	
7. Any District or School Accountability Report produced by Educational Quality and Accountability (EQA) or ESE in the past three years	
8. Teacher's Contract 2009	
9. Staff Report (Highly Qualified)	
10. Long Term Enrollment Trends	
11. End-of-Year Report	
12. List of Federal and State Grants	
13. Municipal Profile	

Appendix B: District Task Checklist

This checklist may be used by the district to prepare for the review. As well as the documents the district is to provide for the review, it includes key tasks that should be completed before the site visit.

PLEASE NOTE:

- *Electronic documents are preferred if available; please post in the district's dropbox.*
- *All documents requested in this list should be provided only if the district already has the materials on hand. This list is in **NO WAY** a request to create new documents or analyses; the review team is looking to understand the district's history under its turnaround plan to date and its current systems and practices.*
- *If documents are on the district website please indicate. And if documents do not exist or can be made available only on site, please indicate.*

Documents to be provided by the district before the site visit	
1. Organization chart	
2. District Improvement Plan	
3. School Improvement Plans	
4. School committee policy manual (if readily available; otherwise to be viewed on site)	
5. Curriculum guide	
6. High school program of studies	
7. Calendar of formative and summative assessments	
8. Copies of data analyses/reports used in schools	
9. Descriptions of student support programs	
10. Program evaluations	
11. Student and Family Handbooks	
12. Faculty Handbook	
13. Professional Development Plan and current program/schedule/courses if available	
14. Teacher planning time/meeting schedules	
15. Teacher evaluation tool	
16. Classroom observation tools/Learning walk tools	
17. Job descriptions (for central office and school administrators and instructional staff)	
18. Numbered list of teachers	
19. Principal evaluations	
To be arranged by the district before the site visit	
1. All administrators, faculty, and staff made aware of the visit and its purpose	
2. Private meeting space for review team secured for days in the district office	
3. Access to copier, printer, and Internet provided	
4. Meeting space secured for district level interviews (different from team room)	
5. Lunch arrangements for the review team made (the team can reimburse)	
6. District prepared to provide documents requested on site, including personnel files as requested by the team	
7. School schedules, directions to schools, maps, and description of parking arrangements if needed made available in team room	

Appendix C: Code of Conduct for Reviewers

1. **Carry out work with integrity**.
    a. Treat all those you meet with courtesy and sensitivity. Try to minimize stress.
    b. Allay anxiety through mutual respect and valuing opinions. Show an interest in what is said.
    c. Focus attention and questions on topics that will reveal how well students are learning.
    d. Protect sensitive and confidential information.

2. **Act in the best interests of students and staff.**
    a. Emphasize that students come first and are at the center of the review.
    b. As much as possible, minimize disruption to teaching and learning.
    c. Do not criticize the work of a teacher or anyone else involved with the school.
    d. Classroom visits are used only to understand instruction at the school. Classroom visits are not evaluations. Specific feedback and information about individual teachers will not be shared with any school personnel.
    e. All teacher interviews are anonymous. Only the superintendent will be identified by name; other individuals will be identified by position only, where appropriate, in both oral and written reports.
    f. Try to understand what leaders and teachers are doing and why.

3. **Base findings on evidence.**
    a. Findings must be robust, fully supported by evidence, and defensible.
    b. Findings must be reliable in that others would make the same finding from the same evidence.
    c. Be prepared to ask questions to establish whether a view is based on evidence.
    This applies, as well, to review team members' findings.
    d. Discussion with staff and review team members is part of the process to create a validated and reliable evidence base from which findings are made.

Appendix D: Guidelines for Classroom Visits

GENERAL GUIDANCE

Classroom visits are one source of information for the review team on instruction in the district. The team will visit a representative range of grade levels, focusing on core academic areas. It is expected that classrooms will be visited for no less than 20 minutes to allow the team to derive an understanding of the lesson and the classroom climate. Most visits will be scheduled, but unplanned visits may occur spontaneously as appropriate.

Classroom visits should reflect a typical experience for students and teachers. Teachers do not need to address the classroom visitor or provide an explanation of the lesson. The classroom visitor may walk around the classroom to review student work or classroom postings, if appropriate.

Classroom visits are NOT evaluations of individual teachers. Specific information about individual teachers will not be shared with any school personnel. Review team members will not provide feedback to individual teachers.

Guidelines for the review team for classroom visits:

- Record factual data on the Instructional Inventory Record (Appendix E) using quotes, tallies, or descriptions.
- Label Instructional Inventory Record with descriptive characteristics, not identifiers such as teacher names.
- Avoid distractions to the class.
- Review samples of student work in folders, portfolios, or displays.
- Talk to students (if appropriate): *What are you learning? Why are you learning it? How do you know if your work is good? What do you do if you need help?*
- Talk to teachers (if appropriate): *What did you hope your students would learn? Why? What do you look for to know if your students met lesson objectives?*
- Make sure that each class visit is for about the same amount of time.

Guidelines for discussion during team meetings (all to occur in the team meeting room):

- All team members share evidence related to each characteristic.
- They state factual evidence and do not make judgmental or subjective statements.
- The team shares and tallies the evidence (No Evidence, Partial Evidence, Solid Evidence) for all classes/characteristics using the Instructional Inventory Spreadsheet.
- The team shares highlights (big ideas, trends, areas of strong practice, areas of need) from the aggregated evidence they collected.
- The team discusses overarching trends, strengths, and challenges observed.
- The team reaches consensus on the trends across classroom visits.
- No data identifying individual classes is distributed to teachers.
- A team member enters data into the Instructional Inventory Spreadsheet and shares it with the team.

Appendix E: Instructional Inventory Record

District: ________________________School:_____________________________ Observer:_______________
Date: ___________Time in: ____ Time out: ____ Total time: ____ (min.) Part of Lesson: Beginning Middle End
Subject:____________________ If applicable: ELL SPED Grade: _________# students: ____ G: ___ B:____
teachers: ____ # assistants: ___ Key: **N**=No **P**=Partial **S**=Solid Evidence observed directly in the lesson

N	*P*	*S*	*Characteristic*	*Comments*
			1. Classroom **climate** is characterized by respectful behaviors, routines, tone, and discourse.	
			2. A learning **objective** (not simply an agenda or an activity description) for the day's lesson is evident. Applicable language objectives are evident and aligned to the ELPBO for ELL students.	
			3. Available class **time** is maximized for learning.	
			4. Instruction links academic concepts to students' **prior knowledge** and experience.	
			5. Supplemental **materials** are aligned with students' **developmental level** and level of English proficiency	
			6. Presentation of **content** is within the students' English proficiency and **developmental level**.	
			7. Depth of **content knowledge** is evident throughout the presentation of the lesson.	

N	*P*	*S*	*Characteristic*	*Comments*
			8. **Instruction** includes a **range of techniques** such as direct instruction, facilitating, and modeling.	
			9. **Questions require** students to engage in a process of **application, analysis, synthesis, and evaluation**.	
			10. The teacher **paces** the lesson to ensure that all students are actively engaged.	
			11. Students **articulate** their **thinking and reasoning**.	
			12. Students are **inquiring, exploring,** or **problem solving** together, in pairs, or in small groups.	
			13. Opportunities for students to **apply new knowledge** and content are embedded in the lesson.	
			14. On-the-spot formative assessments **check for understanding** to inform instruction.	
			15. **Formative written feedback** to students is **evident**.	
			Total tally (15 characteristics)	

Appendix F: Review of District Personnel Files

The purpose of the review of district personnel files is to verify that the district is using appropriately licensed teachers, highly qualified according to the requirements of the Elementary and Secondary Education Act, who are adequately supervised and actively engaged in well-selected professional development activities. There are several steps involved in conducting this review with adequate attention to the security of personal information.

Selection of a statistically representative sample
The district will be asked to provide the review team with a numbered list of faculty members. Review team coordinators will determine the number of folders to review using the formula
Files =20+ (√number of teachers). The coordinator will then use the web site www.random.org to generate a list of random numbers that will be used to choose the personnel files from the numbered list provided by the district.

Review of the Files
Administrator files: Review of principal and other administrator personnel files will focus on licensure or waiver status as described in state regulations, the presence of annual personnel evaluations, any communications from the superintendent, whether positive or negative, and the characteristics of evaluations, including whether they are informative, instructive, and conducive to professional development. Notes on the review of administrator files will be kept on an "Administrator Evaluation Spreadsheet" that has been placed for the district's information and the team's use in the district's dropbox.

Teacher files: Review of teacher files will focus on licensure or waiver status, the presence or absence of evaluations, and the characteristics of the evaluations, including whether they are informative, instructive, and conducive to professional development. Teachers who have not attained professional teacher status should be evaluated annually according to regulations. Teachers who have attained professional teacher status may be evaluated during alternate years. Those who review personnel files will use a "Teacher Evaluation Spreadsheet" to record the characteristics of the evaluations. This spreadsheet has been placed for the district's information and the team's use in the district's dropbox.

Districts are not required to maintain teacher professional development plans in personnel folders. There may be a reference to such documents, or not. If referenced the reference should be noted, but the lack of such references should not be interpreted negatively. Similarly, teacher files containing improvement plans or disciplinary actions should also be noted.

It is important to stress that medical files belonging to any staff members are private and should not be reviewed by team members. They should be kept in a separate file from evaluation and licensure documents, but if not, they should be ignored by review team members. It is also important to recognize that professional development files contain sensitive information, and districts are required to maintain them securely. Teams are expected to ensure that district expectations regarding the security of all personnel files are respected; they will undergo training before the site visit on keeping them secure.

Appendix G: Definitions of Terms Used in this Protocol

Benchmark assessment: an assessment that is given at regular and specified intervals throughout the school year, is designed to evaluate students' knowledge and skills relative to a specific set of academic standards, and produces results that can be aggregated (e.g., by course, grade level, school, or district) in order to inform teachers and administrators at the student, classroom, school, and district levels.

Comprehensive Annual District and School Data Review: a form of assistance to districts and schools being developed by the Department. The reviews will include multiple data elements and will allow districts to compare themselves with similar districts or other districts of their choice and schools to compare themselves with similar schools or other schools of their choice.

Formative assessment: assessment questions, tools, and processes that are embedded in instruction and are used by teachers and students to provide timely feedback for purposes of adjusting instruction to improve learning.

Framework for district accountability and assistance: the Department's guidance as to actions to be taken by the district and by the Department for accountability and for assistance at each of five levels, for the purpose of improving student achievement. Both the priority for assistance and the degree of intervention increase from Level 1 to Level 5, as the severity and duration of identified problems increase. Under the framework, districts hold their schools accountable for educating their students well and assist them in taking the necessary steps toward that end; the Department holds districts accountable for both of these functions and assists them in taking the necessary steps to fulfill them.

Levels 1-5: the levels in the framework for district accountability and assistance in which schools and districts in the Commonwealth are placed.

Tiered instruction: a data-driven prevention, early detection, and support system that guides the allocation of school and district resources with the aim of providing high quality core educational experiences for all students and targeted interventions to struggling students who experience learning or behavioral challenges.

Appendix H: District Standards and Indicators

Note: Conditions for School Effectiveness (CSE) are in italics.

Leadership and Governance

1. Focused School Committee Governance
2. Effective District and School Leadership
3. District and School Improvement Planning
4. Educationally Sound Budget Development
5. District Systems for School Support and Intervention

Curriculum and Instruction

1. Aligned, Consistently Delivered, and Continuously Improving Curriculum
2. Strong Instructional Leadership and Practices
3. Sufficient Instructional Time

Assessment

1. Data Collection and Dissemination
2. Data-Based Decision-Making
3. Student Assessment

Human Resources and Professional Development

1. Staff Recruitment, Selection, Assignment
2. Supervision and Evaluation
3. Professional Development

Student Support

1. Academic Support
2. Access and Equity
3. Educational Continuity and Student Participation
4. Services and Partnerships to Support Learning
5. Safety

Financial and Asset Management

1. Comprehensive and Transparent Budget Process
2. Adequate Budget
3. Financial Tracking, Forecasting, Controls, and Audits
4. Cost-Effective Resource Management
5. Capital Planning and Facility Maintenance

<u>Leadership and Governance</u>: School committee and district and school leaders establish, implement, and continuously evaluate the effectiveness of policies and procedures that are standards-based, driven by student achievement data, and designed to promote continuous improvement of instructional practice and high achievement for all students. Leadership decisions and actions related to the attainment of district and school goals are routinely communicated to the community and promote the public confidence, community support, and financial commitment needed to achieve high performance by students and staff.

1. **Focused School Committee Governance:** School committee members are informed and knowledgeable about their responsibilities under the Education Reform Act. In their policy-making and decision-making they are guided by improvement plan goals and informed by student achievement data and other educationally relevant data. The performance of the superintendent is annually evaluated based on the attainment of the goals in the district improvement plan, MCAS results, and other student achievement data. Together with the superintendent, the school committee creates a culture of collaboration and develops contracts and agreements which encourage all stakeholders to work together.

2. **Effective District and School Leadership**: The superintendent promotes a culture of transparency, accountability, public confidence, collaboration, and joint responsibility for student learning within the district and broader community. The superintendent effectively delegates educational and operational leadership to principals, program leaders, and administrators, and annually evaluates their performance in their roles based on the goals in the district and school improvement plans, MCAS results, and other relevant data. *The district and each school take action to attract, develop, and retain an effective school leadership team that implements a well-designed strategy for accomplishing a clearly defined mission and set of goals, in part by leveraging resources and obtaining staff commitment to improving student learning. Each school leadership team a) ensures staff understanding of and commitment to the school's mission and strategies, b) supports teacher leadership and a collaborative learning culture, c) uses supervision and evaluation practices that assist teacher development, and d) focuses staff time and resources on instructional improvement and student learning through effective management of operations and use of data for improvement planning and management (CSE #1).*

3. **District and School Improvement Planning:** The district and school leaders have a well-understood vision or mission, goals, and priorities for action that are outlined in a District Improvement Plan. The plan's performance goals for students and its analysis of student achievement data drive the development, implementation, and modification of educational programs. Each school uses an approved School Improvement Plan that is aligned with the district's plan and based on an analysis of student achievement data. District and school plans are developed and refined through an iterative process that includes input from staff, families, and partners on district goals, initiatives, policies, and programs. District and school leaders periodically report to the school committee, staff, families, and community on the extent of the attainment of the goals in the plans, particularly regarding student achievement.

4. **Educationally Sound Budget Development:** The superintendent annually recommends to the school committee educationally sound budgets based primarily on its improvement planning and analysis of data The budget is developed and resources are allocated based on the ongoing analysis of aggregated and disaggregated student assessment data to assure the budget's effectiveness in supporting improved achievement for all student populations. District leaders promote equity by distinguishing among the needs of individual schools' populations and allocating adequate resources to the schools and students with greater needs. Each school's administrators are actively involved in the development of its budget.

5. **District Systems for School Support and Intervention***: The district has systems and processes for anticipating and addressing school staffing, instructional, and operational needs in timely, efficient, and effective ways. Using these, it monitors the performance of students and conditions in each school. The district also identifies any persistently low-achieving and/or struggling schools; makes any needed changes in staffing, schedule and/or governance; and supports an ambitious, yet realistic plan for school improvement, including goals, timelines, and benchmarks, with explicit consequences for not meeting benchmarks. The district provides its lowest achieving and struggling schools with additional monitoring and effective support for improvement. (CSE #2)*

Curriculum and Instruction: The curricula and instructional practices in the district are developed and implemented to attain high levels of achievement for all students. They are aligned with components of the state curriculum frameworks and revised to promote higher levels of student achievement.

1. **Aligned, Consistently Delivered, and Continuously Improving Curriculum**: The district and each of its schools have curriculum leadership that ensures consistent use, alignment, and effective delivery of the district's curricula. Teachers and other staff make effective use of curriculum guides for all content areas that include objectives, resources, instructional strategies, timelines, and assessments. The district has an established, documented process for the regular and timely review and revision of curricula based on valid research, the analysis of MCAS results and other assessments, and input from professional staff. *The district ensures that each school's taught curricula a) are aligned to state curriculum frameworks and to the MCAS performance level descriptions, and b) are also aligned vertically (between grades) and horizontally (across classrooms at the same grade level and across sections of the same course). At Levels 4 and 5, priority for alignment is given to mathematics and English language arts. (CSE #3).*

2. **Strong Instructional Leadership and Practices:** The district and each of its schools have leadership and support for effective instruction. District and school leaders address instructional needs and strengths that are identified through active monitoring of instruction and ongoing use of formative and summative student assessment data. *The district ensures that instruction reflects effective practice and high expectations for all students, focuses on clear objectives, uses appropriate educational materials, and includes a) a range of strategies, technologies, and supplemental materials aligned with students' developmental levels and learning needs; b) instructional practices and activities that build a respectful climate and enable students to assume increasing responsibility for their own learning; and c) use of class time that maximizes student learning. Each school has a common understanding of the features of high-quality standards-based instruction and a system for monitoring instructional practice. (CSE #4).*

3. **Sufficient Instructional Time:** The district allocates sufficient instructional time for all students in core content areas. The allocation of time is based on analyses of student achievement data and focused on improving proficiency.

Assessment: District and school leadership use student assessment results, local benchmarks, and other pertinent data to improve student achievement and inform all aspects of its decision-making including: policy development and implementation, instructional programs, assessment practices, procedures, and supervision.

1. **Data Collection and Dissemination:** District assessment policies and practices are characterized by the continuous collection and timely dissemination of data. District and school staff members have access to user-friendly, district-wide and school-based reports on student achievement and other relevant data. All appropriate staff and community members are made aware of internal reports and external review findings.

2. **Data-Based Decision-Making**: The district is highly effective at analyzing and using data to drive decision-making. District and school leadership annually review student assessment results, external and internal reviews, and other pertinent data to prioritize goals, maximize effectiveness in allocating human and financial resources, and to initiate, modify, or discontinue programs and services. District and school leaders monitor student achievement data throughout the year in order to ascertain progress towards goals identified in the district and school plans, and to make needed adjustments programs, policies, services, or supervision practices. All professional staff members are supported and expected to use aggregated and disaggregated student achievement data regularly to improve performance.

3. **Student Assessment** *The district ensures that each school uses a balanced system of formative and benchmark assessments to guide instruction and determine individual remedial and enrichment requirements. Benchmark assessments are given 4 – 8 times per year. At Levels 4 and 5, the district ensures that assessments in English language arts and mathematics are prioritized. (CSE #5)*

<u>Human Resources and Professional Development</u>: The district identifies, attracts, and recruits effective personnel, and structures its environment to support, develop, improve, promote, and retain qualified and effective professional staff who are successful in advancing achievement for all students.

1. **Staff Recruitment, Selection, and Assignment:** The district's policies and practices to identify, recruit and select staff result in the employment of effective individuals who are committed and qualified to meet student needs, contribute to a professional learning community, and, in the case of teachers, provide high quality instruction in their content areas. All members of the professional staff have appropriate Massachusetts licensure. In the event of unfilled professional positions, individuals are hired on waivers and provided mentoring and support to attain the standard of substantial annual progress toward appropriate licensure. The district places a high priority on retaining and maximizing the impact of effective professional staff by creating new roles and career opportunities for exemplary teachers to have responsibility for instructional leadership and to enhance student learning. *The district ensures that each principal has the authority, guidance, and assistance needed to make staffing decisions based on the school's improvement plan and student needs. At Levels 4 and 5, principal authority includes the ability to select, hire, transfer, and assign staff to positions in the school without regard to seniority, and to evaluate and choose to retain faculty based on content knowledge, performance in promoting student learning, overall performance, and commitment to the school's mission and strategies. (CSE #6)*

2. **Supervision and Evaluation:** The district's evaluation procedure for administrators' performance fulfills the requirements of the Education Reform Act and is informative, instructive, and used to promote individual growth and overall effectiveness. Compensation and continued employment for administrators are linked to evidence of effectiveness, as assesses by improvement in student performance and other relevant school data. The district ensures that school leaders regularly use research-based supervision processes to monitor and support teachers to meet instructional and program expectations focused on improved student learning. Through effective supervision practices, administrators identify the strengths and needs of assigned staff in order to plan effective implementation of district and school initiatives , assess the application of skills and practices learned from professional development, provide guidance for improving performance, and provide struggling teachers with opportunities for additional professional development and support. The district's evaluation procedure for teachers' performance is research-based, effectively implemented, and fulfills the requirements of the Education Reform Act. After following due process, the district and schools take action to remove persistently low-performing staff.

3. **Professional Development:** The district and schools use student achievement data, program and instructional practice assessments, and information about staff needs to create a professional development program that supports teachers to develop and maintain content-area expertise as well as research-based and content-specific instructional practice. The district maintains a strong commitment to providing sustained learning opportunities aligned with a common core of professional knowledge for educators at all stages in their careers. Teachers and administrators new to the district or to their assignments are provided with an orientation, coaching and/or mentoring, and support throughout their first years. The district provides systematic supports to make the transition from novice to accomplished educator more effective and professionally rewarding by encouraging professional growth and providing recognition. *Professional development includes a) both job-embedded and individually pursued learning, including content-based learning, that enhances a teacher's knowledge and skills and b) structures for collaboration that enable teachers to have regular, frequent department and/or grade-level common planning and meeting time that is used to improve implementation of the curriculum and instructional practice. At Levels 4 and 5, the district provides a) effective English language arts and mathematics coaching with a ratio of 1 coach to 25 teachers for each subject and b) time dedicated to leadership-directed, collaborative work, during which teachers are not responsible for supervising or teaching students, consisting of no less than one hour per week and, in addition, no fewer than five days (or their equivalent) per year. (CSE #7)*

<u>Student Support</u>: The district provides quality programs for all students that are comprehensive, accessible and rigorous. Student academic support services and district discipline and behavior practices address the needs of all students. The district is effective in maintaining high rates of attendance for students and staff and retains the participation of students through graduation.

1. **Academic Support:** The district has policies, procedures, and practices that promote student high achievement, support course completion, reduce grade retention, and encourage on-time graduation. *The district has an effective system for identifying all students who are not performing at grade level. Each school schedule is designed to provide adequate learning time for all students in core subjects; for students not yet achieving at grade level in English language arts and mathematics, the district ensures that each school provides a) at least 90 minutes per academic day of instruction in English language arts and in mathematics and a tiered model of instruction and individualized support in those subject areas; and b) appropriate supplemental instruction (for example: homework assistance, tutoring, Saturday school, summer school). At Levels 4 and 5, the district ensures that the school a) provides all students needing support access to supplemental academic programming in two or more of the following ways: before, during, or after school, on Saturday, or during vacation time; and b) if it is an elementary school, offers full-day kindergarten and provides preschool services. (CSE #8)*

2. **Access and Equity:** District and school staff members work to close achievement gaps by using aggregated and disaggregated data on student participation and achievement to adjust policies and practices and to provide additional programs or supports. Inclusive classrooms and programs that use an integrated services model minimize separation of special populations from the mainstream of school activity. The district and schools work to promote equity through such means as increasing the proportion of underrepresented subgroups in advanced and accelerated programs. Beginning at the middle school level, leaders actively create pathways to ensure that all students are prepared for post-secondary education and career opportunities upon graduation.

3. **Educational Continuity and Student Participation:** District and school policies and practices promote student attendance, which is continuously monitored, reported, and acted upon. They also promote and track staff attendance and participation, and appropriate provisions are made to ensure continuity for students. District and school policies and practices also help all students make effective transitions from one school, grade level, or program. Entering and mobile students are promptly placed in educationally appropriate settings using information from skill and other assessments when prior school records are not accessible. Transient and homeless students have timely and equitable access to quality programs supported by district oversight, policies and practices to address their needs. Fair and equitable policies, procedures, and practices are implemented to reduce suspensions, exclusions, and other discipline referrals. Policies and practices are implemented to reduce or minimize dropping out, and the district has practices to recover dropouts and return them to an educationally appropriate placement.

4. **Partnerships and Services to Support Learning:** *Each school addresses the social, emotional, and health needs of its students by creating a safe school environment in which student needs are met in systemic and systematic ways, including through a) the provision of coordinated student support services and universal breakfast (if eligible); b) the implementation of a systems approach to establishing a productive social culture that minimizes problem behavior for all students (e.g. Positive Behavior Intervention and Supports); and c) the use of consistent schoolwide attendance and discipline practices and effective classroom management techniques that enable students to assume increasing responsibility for their own behavior and learning. (CSE #9) The district ensures that each school develops strong working relationships with families and appropriate community partners and providers in order to support students' academic progress and social and emotional well-being (CSE #10);* such community partners and providers as human service agencies, corporate and civic sponsors, and higher education give students and families access to health, social, recreational, and supplemental educational services.

5. **Safety:** The district supports schools to maintain safe environments for students. The district has a comprehensive safety plan that is reviewed annually with local police and fire departments and is used to create aligned school plans. The district provides ongoing training for appropriate staff in dealing with crises and emergencies, as well as opportunities for all staff and students to practice safety procedures.

<u>Financial and Asset Management</u>: The district engages in a participative, well-documented, and transparent budget process that uses student achievement as a factor in the overall budget. The district acquires and uses financial, physical, and competitive capital resources to provide for and sustain the advancement of achievement for all students enrolled in the district. The district regularly assesses the effectiveness and efficiency of its financial and capital assets and has the ability to meet reasonable changes and unanticipated events.

1. **Comprehensive and Transparent Budget Process:** The district's budget is developed through an open, participatory process, and the resulting document is clear, comprehensive, complete, current, and understandable. The budget provides accurate information on all fund sources, as well as budgetary history and trends. The district and community have appropriate written agreements and memoranda related to 603 CMR 10.0 that detail the manner for calculating and the amounts to be used in calculating indirect charges levied on the school district budget by the community. Regular, timely, accurate, and complete financial reports are made to the school committee, appropriate administrators and staff, and the public. Required local, state, and federal financial reports and statements are accurate and filed on time.

2. **Adequate Budget:** The community annually provides sufficient financial resources to ensure educationally sound programs and quality facilities, with a sufficient district revenue levy and level of local spending for education. The combination of Chapter 70 Aid and local revenues, considering justified indirect charges, meets or exceeds Net School Spending (NSS) requirements of the education reform formula. The district's budget and supplemental funding are adequate to provide for effective instructional practices and adequate operational resources.

3. **Cost-Effective Resource Management:** As part of its budget development, the district implements a review process to determine the cost-effectiveness of its programs, initiatives, and activities. This process is based, in part, on student performance data and needs. *District and school plans are coordinated to provide integrated use of internal and external resources (human, financial, community and other) to achieve each school's mission. At Levels 4 and 5, the district provides the school with a weighted per-pupil budget for staffing and instructional resources, and gives the principal the authority and assistance needed to make appropriate decisions about its expenditure consistent with the turnaround plan. (CSE #11)* The district has a system in place to pursue, acquire, monitor, and coordinate all local, state, federal, and private competitive grants. The district implements an effective system to monitor special revenue funds, revolving accounts, and the fees related to them to ensure that they are managed efficiently and used effectively for the purposes intended and to advance the district's improvement plan. The district actively seeks ways to leverage resources and expand capacity through collaboration with such external partners as educational collaboratives and institutions of higher education.

4. **Financial Tracking, Forecasting, Controls, and Audits:** District administrators are able to regularly and accurately track spending and other financial transactions. The district uses forecast mechanisms and control procedures to ensure that spending is within budget limits. It uses efficient accounting technology to facilitate tracking, forecasting, and control procedures, and to integrate the district-level financial information of each school and program. All procurement, tracking, and monitoring systems and external audits are accurate, current, and timely. The district has a system in place to ensure that state procurement laws are followed, that staff are qualified to manage their fiscal responsibilities, and that all assets and expenditures are monitored and tracked to attain the most efficient and effective utilization. The district competitively procures independent financial auditing services at least every five years, shares the results of these audits, and consistently implements their recommendations.

5. **Capital Planning and Facility Maintenance:** The district has a formal preventive maintenance program to maximize and prolong the effective use of the district's capital and major facility assets, as well as to ensure that educational and program facilities are clean, safe, secure, well-lit, well-maintained, and conducive to student learning. The district has a long-term capital plan that clearly and accurately reflects future capital development and improvement needs, including the need for educational and program facilities of adequate size. The plan is reviewed and revised as needed with input from all appropriate stakeholders.