Competency-Based Learning Simplified: New Schooling By Design Leadership Institute

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Ten Principles of Proficiency-Based Learning

Over the past decade, the movement to adopt proficiency-based approaches to teaching, learning, and graduating has gained momentum throughout the United States, as more educators, parents, business leaders, and elected officials recognize that high academic expectations and strong educational preparation are essential to success in today’s world. Schools use proficiency-based learning to raise academic standards, ensure that more students meet those higher expectations, and graduate more students better prepared for adult life.

To help schools establish a philosophical and pedagogical foundation for their work, the Great Schools Partnership created the following “Ten Principles of Proficiency-Based Learning,” which describe the common features found in the most effective proficiency-based systems:

1. All learning expectations are clearly and consistently communicated to students and families, including long-term expectations (such as graduation requirements and graduation standards), short-term expectations (such as the specific learning objectives for a course or other learning experience), and general expectations (such as the performance levels used in the school’s grading and reporting system).

2. Student achievement is evaluated against common learning standards and performance expectations that are consistently applied to all students regardless of whether they are enrolled in traditional courses or pursuing alternative learning pathways.

3. All forms of assessment are standards-based and criterion-referenced, and success is defined by the achievement of expected standards, not relative measures of performance or student-to-student comparisons.

4. Formative assessments measure learning progress during the instructional process, and formative-assessment results are used to inform instructional adjustments, teaching practices, and academic support.

5. Summative assessments - which are integrated tasks requiring transfer of knowledge and skills, application, and performance in novel settings - evaluate a student’s level of proficiency at a specific point in time.

6. Academic progress and achievement are monitored and reported separately from work habits, character traits, and behaviors such as attendance and class participation, which are also monitored and reported.

7. Academic grades communicate learning progress and achievement to students and families, and grades are used to facilitate and improve the learning process.

8. Students are given multiple opportunities to improve their work when they fail to meet expected standards.

9. Students can demonstrate learning progress and achievement in multiple ways through differentiated assessments, personalized-learning options, or alternative learning pathways.

10. Students are given opportunities to make important decisions about their learning, which includes contributing to the design of learning experiences and learning pathways.
Proficiency-Based Learning Simplified

For proficiency-based learning to be effective, school leaders and teachers need to prioritize. They have to determine what critical skills students absolutely need to acquire before they graduate from high school, what content knowledge students need to know in each subject area, and what important benchmarks students need to meet as they progress through their education.

Proficiency-Based Learning Simplified provides a foundational structure that will help schools prioritize learning goals and build a more coherent academic program.

The following diagram illustrates how the Proficiency-Based Learning Simplified model works in practice:

### Proficiency-Based Learning Simplified

A Great Schools Partnership Learning Model

<table>
<thead>
<tr>
<th>Graduation Requirement</th>
<th>Reporting Method</th>
<th>Cross-Curricular Graduation Standards</th>
<th>Body of Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>YES</td>
<td>Transcripts and Report Cards</td>
<td>5–8 standards taught in all content areas</td>
<td>Students demonstrate achievement of standards through a body of evidence evaluated using common rubrics</td>
</tr>
<tr>
<td>YES</td>
<td>Transcripts and Report Cards</td>
<td>Content-Area Graduation Standards 5–8 standards for each content area</td>
<td>Verification of Proficiency</td>
</tr>
<tr>
<td>NO</td>
<td>Progress Reports</td>
<td>Performance Indicators 5–10 indicators for each cross-curricular and content-area standard that move students toward proficiency and the achievement of graduation standards</td>
<td>Summative Assessment</td>
</tr>
<tr>
<td>NO</td>
<td>Teacher Feedback</td>
<td>Learning Objectives Learning objectives guide the design of curriculum units that move students toward proficiency and the achievement of performance indicators</td>
<td>Formative Assessment</td>
</tr>
</tbody>
</table>

**Cross-Curricular Graduation Standards** are aligned with cross-curricular state standards, and they should describe the most essential skills and habits of work that students will need to succeed in adult life. Students demonstrate achievement of cross-curricular graduation standards through a body of evidence, such as portfolios, exhibitions, or capstone projects that are evaluated using common rubrics.

**Content-Area Graduation Standards** are aligned with state standards and learning progressions, and they describe the most essential content knowledge that students will need to succeed in adult life. Students demonstrate achievement of content-area graduation standards through their aggregate achievement of performance indicators over time.

In general, the measurement of progress on graduation standards is determined at the end of elementary school (grade 5) and middle school (grade 8), and the final achievement of graduation standards is determined at the end of high school (grade 12). School districts may choose to structure their standards progressions differently or use different grade levels for measurement of progress.

**Performance Indicators** are aligned with content-area and cross-curricular state standards, and they provide more detailed descriptions of what it means to meet a graduation standard. Achievement of performance indicators may be determined using summative assessments—either common school-wide assessments for a content area and grade level, or course assessments developed by individual teachers. Over time, a student’s aggregate performance on summative assessments determines whether performance indicators have been met.

**Learning Objectives** are aligned with state standards and guide the design of curriculum units intended to move students toward proficiency and the achievement of performance indicators. Achievement of unit-based learning objectives is determined using formative assessments, and teacher feedback prepares students for summative assessments. Teachers provide students with multiple opportunities to demonstrate their emerging proficiency.
Assessment Pathways Simplified
A Great Schools Partnership Learning Model

**LESS**
Student Choice in Learning

**OPTION 1**
- **COMMON**
  - Learning Experiences
  - Demonstration Tasks
  - Scoring Guides

**COMMON**
Learning Experiences

**COMMON**
Demonstration Tasks

**COMMON**
Scoring Guides

**VALID and RELIABLE results**
that are **COMPARABLE**
across **STUDENTS, COURSES, SCHOOLS, DISTRICTS, or STATES**

**OPTION 2**
- **COMMON**
  - Learning Experiences
  - Demonstration Tasks
  - Scoring Guides

**COMMON**
Learning Experiences

**UNIQUE**
Demonstration Tasks

**COMMON**
Scoring Guides

**OPTION 3**
- **UNIQUE**
  - Learning Experiences
  - Demonstration Tasks
  - Scoring Guides

**UNIQUE**
Learning Experiences

**COMMON**
Demonstration Tasks

**COMMON**
Scoring Guides

**OPTION 4**
- **UNIQUE**
  - Learning Experiences
  - Demonstration Tasks
  - Scoring Guides

**UNIQUE**
Learning Experiences

**UNIQUE**
Demonstration Tasks

**COMMON**
Scoring Guides

**OPTION 5**
- **UNIQUE**
  - Learning Experiences
  - Demonstration Tasks
  - Scoring Guides

**UNIQUE**
Learning Experiences

**UNIQUE**
Demonstration Tasks

**UNIQUE**
Scoring Guides

**VALID and RELIABLE results**

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**Planning for Proficiency-Based Learning**

**Policy**
- Engage school board in developing conceptual understanding about proficiency-based learning
- Review existing policies
- Draft new and revised policies
- Collect feedback on draft policies from faculty, staff, students, parents, and local officials
- Refine policies based on feedback
- Adopt new and revised policies

**Practice**
- Establish a district wide proficiency-based committee
- Engage faculty and staff in professional development on proficiency-based learning
- Collaboratively develop the conceptual framework with faculty and staff
- Develop cross-curricular graduation standards
- Develop content-area graduation standards
- Develop performance indicators for cross-curricular and content-area graduation standards
- Align curriculum with performance indicators
- Develop assessments for performance indicators
- Develop instructional units, including learning targets and essential questions
- Develop assessments for achievement of learning targets
- Develop lesson plans

**Community Engagement**
- Engage local media
- Engage students, parents, and the public about proficiency-based learning
- Implement system for reporting on the achievement of student learning
- Develop communications plan for proficiency-based learning
- Develop body-of-evidence assessment process for demonstration of cross-curricular graduation standards
- Develop system for verifying achievement of content-area standards
- Develop a process for reporting on the achievement of student learning
- Develop Record Keeping, Transcript, and Report Card

**Key**
- Policy
- Practice: Graduation Requirements
- Practice: Instructional System
- Community Engagement

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Maine Department of Education and Great Schools Partnership.
I. Policy

1. Engage school board to increase understanding of proficiency-based learning—what it is and why it matters to the different stakeholders
2. Review existing district and school policies to determine what needs to be modified or developed, including what is potentially in conflict with proficiency-based learning
3. Draft new or revised district and school policies
4. Collect feedback on draft policies from faculty, staff, students, parents, and local officials
5. Refine policies based on feedback
6. Adopt new or revised policies

II. Practice

A. Processes

1. Establish a district-level leadership team to plan and coordinate implementation (GS, IS)
2. Establish a school-level leadership team to plan and coordinate implementation (GS, IS)
3. Openly and collaboratively develop the rationale and learning philosophy for proficiency-based learning with faculty, staff, students, parents, and community members (GS, IS)
4. Create a professional-development plan for faculty and staff (IS)
5. Engage faculty and staff in professional development related to curriculum design, instruction, assessment, grading, and reporting (IS)
6. Establish and use professional learning groups to sustain professional development for proficiency-based learning over time (IS)

B. Teaching and Learning

1. Develop cross-curricular graduation standards (GS)
2. Develop content-area graduation standards (GS)
3. Develop performance indicators for cross-curricular and content-area graduation standards (GS)
4. Align standards and performance indicators to learning experiences (i.e. courses, extended learning opportunities, internships, dual enrollment, etc.) (GS)
5. Develop task neutral scoring criteria for cross-curricular and content-area performance indicators
6. Develop summative assessments for performance indicators (GS)
7. Develop instructional units based on standards, enduring understandings, and essential questions (GS)
C. Reporting
1. Develop a process for verifying achievement of cross-curricular performance indicators and graduation standards (GS)
2. Develop a process for verifying achievement of content-area performance indicators and graduation standards (GS)
3. Revise each school’s program of studies so that it describes how learning experiences (including pathways) are offered and serves as a guide to the school’s new graduation requirements for students, parents, and families (GS, CE)
4. Develop record keeping process, transcript and school profile, and report card.
5. Implement record keeping process, transcript and school profile, and report card.

D. Supports & Interventions
1. Design a data-informed system for supporting student learning during the school day (inside and outside of the classroom).
2. Create processes for proactively helping students review their progress towards proficiency and plan the use of academic support time.
3. Design processes and explore opportunities for students who consistently exceed the standards (note: we’re still struggling with this one…. should we explicitly call attention to acceleration and enrichment?)

III. Community Engagement
1. Develop a communications plan for proficiency-based learning
2. Identify a district or school staff member who will be the point person or coordinator for communications related to the implementation plan
3. Engage the community to determine their views on the skills, knowledge, and habits of work that students need, and what kind of learning experiences they believe will prepare students for adult life
4. Dedicate a section of the district and school websites to proficiency-based learning that explains—in accessible language—what proficiency-based learning is, why it matters, and how it works
5. Proactively meet with local media outlets to brief editors and reporters on proficiency-based learning and why it matters
6. Proactively meet with local business, community, and political leaders to brief them on proficiency-based learning and why it matters
7. Hold community forums on the proficiency-based learning plan, using compelling data, images, and presentations to increase understanding
8. Continue to create and publish press releases, blog posts, images, videos, presentations, and other resources related to innovative learning experiences, success stories, and performance gains

NOTES
GS = Practice: Graduation Standards (i.e. the literal requirements of the statute in Maine)
IS = Practice: Instructional System (i.e. while not specific required, these are elements that we recommend are implemented to ensure the successful implementation of PBLS)
CE = Community Engagement

This is working draft that has not been fully vetted. Do not distribute.
Proficiency-Based Learning Simplified Framework

**What Teachers Do**

- Identify cross-curricular standards for college and career success.
- Design criteria for capstone experiences for students to showcase achievement.
- Make decisions on student achievement of graduation standards.

- Collaborate with students on ways to demonstrate competency.
- Make decisions on student achievement of graduation standards.

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- Make decisions on student achievement of graduation standards.

- Collaboratively create common assessments for performance indicators.
- Track and analyze data to inform instructional practice.
- Support students to design strategies that demonstrate achievement through unique learning pathways.

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- Coach students to achieve the learning objectives.
- Individually or collectively design learning units.

- Demonstrate achievement of content area graduation standards through teacher and student-designed demonstration tasks.
- Use online learning and assessments to complement and enhance other learning methods.

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- Demonstrate achievement of performance indicators and learning objectives through teacher and student-designed demonstration tasks.
- Engage in learning tasks designed by both teachers and students.
- Complement classroom learning with digital and varied authentic experiences.

**What Students Do**

- Publicly demonstrate standards through a body of evidence accumulated over school career.
- Design, select and engage in capstone projects, community-based work, and various authentic experiences.

- Demonstrate achievement of content area graduation standards through teacher and student-designed demonstration tasks.
- Use online learning and assessments to complement and enhance other learning methods.

- Show evidence accumulated over school career.
- Use online learning and assessments to complement and enhance other learning methods.
Proficiency-Based Learning Simplified Framework

**What Districts Do:**
(Policy, Budget and Public Engagement)

- Define graduation based on achievement of district standards
- Coordinate and engage stakeholders in the identification of district-wide standards
- Use media to communicate and celebrate the work of the schools
- Develop a district-wide messaging strategy
- Establish external partnerships

**What Schools Do:**
(Talent, Design and Technology)

- Use technology to track demonstrations of student learning within varied learning pathways.
- Enable students to “own” technology to demonstrate their learning
- Democratically involve teachers and students in making substantive school decisions
- Establish regular professional learning and planning time within the contractual work day for all teachers

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**Graduation Standards**
Cross-Curricular skills

**Performance Indicators**
demonstration of competency with common, summative assessments

**Unit-Based Personalized learning objectives**
Daily learning targets that support performance indicator competencies

**Multiple and Personalized Learning Pathways**

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demonstration of competency in content areas

**Performance Indicators**
demonstration of competency with common, summative assessments

**Unit-Based Personalized learning objectives**
Daily learning targets that support performance indicator competencies

**Multiple and Personalized Learning Pathways**
Cycle of Action
Goal-Driven School Coaching

A Product of the Great Schools Partnership, Inc.
School Coaching: An Introduction

When we establish a coaching relationship with a school, we believe it is vitally important to clarify commitments and expectations in advance. We created this document to answer the four most common questions that schools ask when considering a coaching contract with the Great Schools Partnership:

1. How does school coaching work?
2. What will our school or district have to do?
3. What will the Great Schools Partnership do?
4. How long will it take?

While every school or district is unique—and there are no easy, one-size-fits-all answers to the questions above—the Great Schools Partnership has developed a variety of high-impact coaching strategies that are based on sound education research and the insights we have gained over the many years we have been working with schools. These core strategies are then customized, in collaboration with the administrators and teachers, to address the unique needs of your students, faculty, and community.

School leaders will find detailed information throughout this document that will help them understand the school-improvement process and how a school coach can support, guide, strengthen, and accelerate this work. Each section outlines the general steps a school will take when working with the Great Schools Partnership, including summaries of the major stages, estimated timeframes, the school’s responsibilities, and several examples of the kind of support a school coach provides.

What Is a School Coach?

A school coach’s primary role is to keep a school community intensively focused on achieving its goals regardless of what obstacles arise or setbacks occur. Unlike some consultants and education organizations, the Great Schools Partnership does not have a prepackaged improvement program that we “sell” to a school. We recognize that every school is a complex, interdependent learning ecosystem, each with its own unique teachers and students, qualities and characteristics, strengths and weaknesses. While every school-improvement plan is developed in collaboration with administrators and faculty, our coaches utilize a repertoire of research-based techniques and strategies that have moved schools from underperforming to excelling. Every action plan is based on specific organizational or student needs, existing resources and capacity, and the school’s vision, mission, and goals.

Many of our school-coaching relationships last multiple years, not a few weeks, since it takes time to gain a deep understanding of a school, establish trusting relationships with the faculty and community, and build the internal expertise required to sustain the challenging work of school improvement over time. Despite being invested in the school and its goals, our coaches remain “critical friends” who offer objective professional insights and perspectives that have been informed by experience. If the school-improvement process becomes sidetracked by unforeseen crises, budgetary concerns, or internal tensions, for example, the school coach can step in to ensure that discussions and actions remain focused, productive, and goal-oriented. Finally, a school coach works closely with school leaders to build a sustainable school-improvement model. From policy and budgeting to professional development and instructional practices, our goal is to equip schools with the resources, knowledge, and know-how they need to achieve their goals.
Cycle of Action

This school-coaching overview follows our Cycle of Action—a simple tool we developed to frame the critical steps schools take when engaged in an evidence-based, goal-driven school-improvement process designed to raise the educational achievement, aspirations, and attainment of all students. The Cycle of Action is not a linear process that begins and ends, but a series of thoughtful, purposeful steps that schools undertake as they refine and focus their action plan, make progress towards goals, review what’s working and what’s not, and adjust priorities in response to emerging needs.

The Great Schools Partnership’s goal-driven approach to school coaching helps schools remained focused on the larger mission—preparing every student for success in the colleges, careers, and communities of the 21st century—when institutional issues, budgetary concerns, or preexisting beliefs threaten to undermine or impede progress.

The four essential questions on the outer perimeter represent the four overarching stages in the cycle: (1) an objective assessment of where a school is in terms or performance or progress; (2) identification of the obstacles and assets that will hinder or support a school-improvement process; (3) a determination of goals and a supporting rationale based on the first two steps in the process; and (4) a comprehensive action plan that will outline precisely how a school community will work together to achieve its goals.
PHASE I: Where are we now?

STEP 1: Analyze Student Data

OVERVIEW
The purpose of the first step in the Cycle of Action is to take a thorough, objective look at where your students are doing well and where they are not. By analyzing graduation rates, college-going patterns, assessment scores, course failures, and behavioral data, for example, and then disaggregating this information by socioeconomic status, race, ELL status, special needs, and other criteria, schools develop long-term goals based on hard evidence and identified areas of strength or weakness.

OUTCOMES: A detailed, objective understanding of student learning needs.

ESTIMATED TIMEFRAME: 2–4 weeks

REPRESENTATIVE ACTIVITIES
• Collect and organize all relevant student-performance data
• Disaggregate data by student demographics/subgroups
• Engage faculty, students, community, and school board members in the data analysis process
• Allocate staff time to lead and coordinate the responsibilities above

REPRESENTATIVE COACHING SUPPORT
• Facilitating staff/faculty meetings focused on data collection and analysis
• Supplying relevant tools, resources, and guidance to assigned staff
• Conducting formal or informal training in effective data-analysis strategies
• Identifying the most useful or revealing trends and patterns in the data
• Assisting with the presentation of findings to faculty, community, and school board
STEP 2: Analyze School Practices

OVERVIEW
The purpose of Step 2 in the Cycle of Action is to audit school practices—both organizational and instructional—to identify areas in need of improvement and determine action-plan priorities. Based on the student-learning needs identified in Step 1, this audit will help schools connect student performance to specific practices, content areas, grade levels, teams, and other factors.

OUTCOMES: A detailed, objective understanding of which programs are working well and which are not.

ESTIMATED TIMEFRAME: 2-4 weeks

REPRESENTATIVE ACTIVITIES
• Audit existing organizational and instructional practices
• Analyze data by mapping student achievement to practices and programs
• Engage faculty, students, community, and school board members in the process and help them understand the results
• Allocate staff time to lead and coordinate the responsibilities above

REPRESENTATIVE COACHING SUPPORT
• Facilitating staff/faculty meetings focused on practice analysis
• Supplying relevant tools, resources, and guidance to assigned staff
• Reviewing and mapping school policies and organizational structures
• Observing school and classroom practices
• Facilitating the Global Best Practices self-assessment and reflection process
• Facilitation a program of studies review and analysis process
• Assisting with the presentation of findings to faculty, community, and school board
PHASE II: What obstacles do we face, what assets do we have?

STEP 3: Identify Internal Obstacles and Assets

OVERVIEW
Now that a school is equipped with a detailed analysis of its performance and a review of its practices, school leaders need to determine what obstacles stand in their way and what existing resources, expertise, and conditions can be harnessed or leveraged. Specific examples of obstacles might include school policies that limit innovation, outdated programs and courses that should be phased out, limited staff expertise in a critical area, insufficient funding for professional development, a complicated schedule that does not provide teachers with sufficient time to collaborate, or a teachers’ contract with rigid parameters. Assets might include a high-functioning professional learning group community, classrooms equipped with digital whiteboards and other learning technologies, staff members with specialized expertise in a critical area such as literacy, or a cohesive, motivated leadership team. In some cases, an obstacle at one school could be an asset at another—for example, contractual obligations for teachers or the school schedule. Assets and obstacles are always local and contextual.

OUTCOMES: A prioritized list of internal obstacles that need to be addressed, modified, or removed, and a list of internal assets that can be integrated into the action plan.

ESTIMATED TIMEFRAME: 2–4 weeks

REPRESENTATIVE ACTIVITIES

- Develop prioritized lists of obstacles and assets
- Survey (when appropriate) faculty, parents, students, and community members to surface obstacles and assets
- Allocate staff time to lead and coordinate the responsibilities above

REPRESENTATIVE COACHING SUPPORT

- Facilitating leadership meetings to identify obstacles and assets
- Supplying relevant tools, resources, and guidance to assigned staff
- Helping to identify critical assets and develop strategies to overcome obstacles based on what has worked in other schools or similar contexts
STEP 4: Identify External Obstacles and Assets

OVERVIEW
In Step 4, the school will identify external obstacles, resources, expertise, and conditions that can be harnessed or leveraged to execute the school’s strategies and achieve its goals. Specific examples of obstacles might include district, state, or federal policies that limit innovation, local political factors, or even the community’s economic situation. Assets might include a supportive school superintendent and school board, grant opportunities, or district, state, or federal policies and funding that align with and support the school’s goals and strategies. Again, an obstacle for one school might be an asset in another—for example, the requirements associated with a grant or an external review process.

OUTCOMES: A prioritized list of external obstacles that need to be addressed, modified, or removed, and a list of external assets that be integrated into the action plan.

ESTIMATED TIMEFRAME: 2–4 weeks

REPRESENTATIVE ACTIVITIES
• Undertake a review of local policies, external requirements (state or federal), staffing, and the school budget
• Survey (when appropriate) faculty, parents, students, and community members to surface obstacles and assets
• Present preliminary findings and plans to superintendent and school board to determine levels of support or resistance
• Allocate staff time to lead and coordinate the responsibilities above

REPRESENTATIVE COACHING SUPPORT
• Facilitating leadership meetings focused identifying obstacles and assets
• Supplying relevant tools, resources, and guidance to assigned staff, including information about state and federal policies and programs that could impede or support the work
• Helping to identify critical assets and develop strategies to overcome obstacles based on what has worked in other schools or similar contexts
PHASE III: Where do we want to be?

STEP 5: Identify Student Achievement Goals

OVERVIEW
The identification of student-achievement goals is one of the most critical steps in the school-improvement process. Reforms typically break down or lose momentum when a school becomes narrowly focused on the implementation of short-term strategies, losing sight of the long-term goals that should be guiding the process. Higher student aspirations, achievement, and attainment are the organizing rationale of every school-improvement plan, and establishing clear performance goals helps schools remain results-driven and outcome-focused. Schools should identify a relatively small set of goals (3–5) that can be measured and tracked over several years. Long-term goals should be few in number, but schools can develop shorter-term annual targets to help them evaluate progress over time.

OUTCOMES: A set of 3–5 student-performance goals to be achieved over a 3–5 year period. In addition, schools will establish annual interim indicators to measure progress made toward the achievement of its goals.

ESTIMATED TIMEFRAME: 2–4 weeks

REPRESENTATIVE ACTIVITIES
- Analyze student-performance data alongside the school practices audit
- Determine goals for student achievement (assessments, standards)
- Determine goals for student aspirations and attainment (graduation, postsecondary enrollment)
- Allocate staff time to lead and coordinate the responsibilities above

REPRESENTATIVE COACHING SUPPORT
- Facilitating faculty/community meetings focused on goal setting
- Supplying tools, resources, and guidance to assigned staff, including research literature and relevant protocols
- Providing constructive, critical feedback on goals (i.e., vetting for strength, feasibility, appropriateness, etc.)
STEP 6: Identify Improvement Strategies

OVERVIEW
Once a school has determined its short-term and long-term goals for student achievement, it becomes much easier to identify the strategies necessary to move the school community closer to its goals. Strategies should always serve goals, not the other way around. As part of this process, schools often visit other schools to learn about specific programs and implementation strategies. In addition, the improvement strategies a school pursues should not only be based on sound research and concrete evidence of success, but they should also be coherent (systemically aligned with other strategies) and feasible (capable of being executed with existing capacity and resources). While an effective school-improvement plan should not be unrealistically ambitious, a school community should nevertheless challenge itself to take risks, strengthen professional expertise, and work more collaboratively.

OUTCOMES: A selection of research-based strategies aligned with identified goals.
ESTIMATED TIMEFRAME: 2-4 weeks

REPRESENTATIVE ACTIVITIES
- Research best practices and school-improvement strategies
- Visit other schools to learn about effective programs
- Determine needs for short- and long-term faculty development
- Select practical, high-impact improvement strategies
- Allocate staff time to lead and coordinate the responsibilities above

REPRESENTATIVE COACHING SUPPORT
- Facilitating faculty/community meetings focused on the identification of appropriate strategies
- Supplying relevant tools, resources, and guidance to assigned staff, including research literature and protocols
- Providing constructive, critical feedback on strategies, and assistance customizing strategies to meet identified needs and goals
- Providing samples/case studies of effective strategies from other schools
- Assisting with the coordination of site visits to other schools or programs employing effective practices
PHASE IV: What are we going to do?

STEP 7: Develop or Refine Action Plan

OVERVIEW
Armed with the insights gleaned from a comprehensive assessment of its performance, practices, obstacles, and assets, the school is now ready to develop an action plan. The best action plans are uncomplicated, practical, and focused on implementing a selection of concrete, high-impact strategies intended to achieve measurable outcomes. Once a thoughtful action plan is in place—which includes a broad-based distribution of responsibility for its execution—educators can move forward with confidence, knowing that they are executing a series of proven, practical, and coherent school-improvement strategies.

OUTCOME: A practical, data-driven, goal-oriented action plan covering at least twelve to eighteen months of activity within a three to five year overall time frame.

ESTIMATED TIMEFRAME: 2-4 weeks

REPRESENTATIVE ACTIVITIES

- Research school-improvement implementations and effective action plans
- Finalize action plan and assign responsibilities for its execution
- Develop an accountability system to make sure responsibilities are executed
- Develop an evaluation plan for measuring progress toward goals
- Refine and implement a communications strategy to build support for the action plan among faculty, parents, and community
- Create a one-page summary of the core features of the school-improvement program, including graphics

REPRESENTATIVE COACHING SUPPORT

- Facilitate and/or participate in all action-plan retreats
- Assisting with the organization of community presentations and media outreach
- Supplying tools, resources, and guidance to assigned staff, including examples of effective action plans, communications, accountability strategies
- Building staff/faculty capacity for strategic collaboration and planning
STEP 8: Implement and Monitor Action Plan

OVERVIEW
Implementing the action plan is a combination of activities that directly impact students and build faculty capacity to sustain improvements over time. As the implementation proceeds, professional learning and planning need to be woven into the work. Schools will be collecting data, reviewing progress, and adapting strategies as needed. Knowing what’s working, and being able to measure how far you have come, are the primary goals of an evaluation plan.

OUTCOME: Implementation of the Action Plan

ESTIMATED TIMEFRAME: 12-18 months

REPRESENTATIVE ACTIVITIES
- Fidelity to the action plan, making changes publicly as necessary and appropriate
- Regularly review progress using the evaluation plan
- Refine and implement the communications strategy to build support for the action plan among faculty, parents, and community
- Create a one-page summary of the core features of the school-improvement program, including graphics

REPRESENTATIVE COACHING SUPPORT
- Facilitate and/or participate in all leadership-team retreats
- Assisting with the organization of community presentations, communication strategies, and media outreach
- Supplying tools, resources, and guidance to assigned staff, including examples of effective action plans, communications materials, and accountability strategies
- Building staff/faculty capacity for strategic collaboration and planning
- Monitoring implementation and guiding responsive, in-process adjustments
- Providing regular coaching reports summarizing observations and progress
- Providing training for professional learning group facilitators
Tools and Resources

Over the years, the Great Schools Partnership has developed a variety of tools to help schools undertaking a systemic improvement process. The following tools are often used as part of our work.

iWalkthrough

The iWalkthrough system is a technology-driven classroom-observation tool and reporting system that has been used by thousands of school administrators and teachers across the country. The iWalkthrough database includes more than 80,000 entries—quite possibly the world’s largest repository of classroom observations in the world. iWalkthrough provides schools with a comprehensive system for consistently, objectively, and efficiently tracking patterns of instructional practice. During brief classroom observations, iWalkthrough users record evidence of research-based instructional characteristics on handheld digital devices that automatically upload records to a secure online database. A proprietary reporting system allows users to quickly sort, compare, and analyze a wealth of instructional data—collected over weeks, months, and years—with only a few clicks of the mouse. The system can generate thousands of possible data comparisons, giving educators unprecedented control over and insight into the data they have collected. The longitudinal data profile generated by the iWalkthrough system can uncover deeply entrenched cultural or instructional issues that might otherwise go unnoticed for years. The secure online tools, let users generate real-time reports 24-hours a day and review school-wide data or only those observations recorded in a specific classroom, grade level, or content area. When analyzed alongside student performance and outcomes, iWalkthrough data helps schools strengthen teaching and develop a coherent plan for instructional improvement that is based on sound evidence and a common understanding of student learning needs—a process that we have seen energize and inspire faculties.

FMI: iwalkthrough.org

Global Best Practices

Developed for the New England Secondary School Consortium, Global Best Practices is an action-oriented self-assessment resource that helps secondary schools review learning standards, organizational structures, leadership models, teaching strategies, professional development, and student outcomes in relation to research on high-performing educational systems and research-based practices. Global Best Practices was created to (1) promote a more global perspective in secondary schools, (2) distill hard-to-find research—on both American and international education systems—and make it more accessible to busy educators, (3) translate selected international best practices for an American audience and context, (4) help schools assess their relative performance in critical areas and develop focused, evidence-based improvement priorities, and (5) provide a practical, step-by-step process that secondary educators can use to shape and refine school-improvement plans. A companion facilitator guide helps school leaders conduct a productive faculty self-assessment process and a research summary presents the foundational studies that informed the development of the tool.

FMI: greatschoolspartnership.org/global-best-practices.html

Action Planning Resources

The Great Schools Partnership has developed a variety of templates, protocols, and planning tools that help schools develop a coherent, focused, high-impact action plan. These resources are provided to all schools that have a school-coaching contract with the Great Schools Partnership.

Harnessing Teacher Knowledge

Harnessing Teacher Knowledge is a comprehensive suite of resources designed to help school administrators and teacher-leaders engage in a thoughtful self-assessment process as they work toward creating a high-functioning professional learning and planning program in their school. Research on common planning time and teacher
Collaboration over the past few decades has isolated certain characteristics and strategies that appear to have a significant impact on instructional quality and student achievement. Rather than promoting a specific model or program, the tool distills a variety of features and practices from research that can help schools efficiently and effectively build a collaborative, job-embedded, teacher-driven professional development program. Harnessing Teacher Knowledge also includes several supplemental materials that will help school leaders and teachers facilitate a productive work session, use protocols to structure faculty conversations, design effective professional learning and planning meetings, and track the impact of teacher collaboration over time.

FMI: greatschoolspartnership.org/harnessing-teacher-knowledge.html

Professional Learning Group Training
Professional Learning Groups (PLGs) are small teams of six to twelve teachers who meet regularly to discuss teacher work, student work, research, or data share. In most cases, these teams share common students, interests, or teaching responsibilities, such as the same content area, grade level, or team assignment. The groups give structure to professional conversations and provide a safe forum in which colleagues can exchange pedagogical philosophies, content knowledge, and instructional strategies, while working through challenging issues or dilemmas in collaboration rather than isolation. PLGs are designed to capture and build on the knowledge and skills of participating teachers in ways that will help them increase the aspirations and achievement of their students. The core services offered by the Great Schools Partnership include (1) training teachers in facilitation, group dynamics, and our organization’s nationally recognized PLG model, (2) working with leadership teams to design, plan, and direct their own PLG work, and (3) assisting faculties with the implementation of a purposeful PLG program that is aligned with a school action plan. Our training program equips schools with a sustainable, teacher-driven professional development model, one that national and international research has shown to be among the most effective strategies for strengthening school cultures and practices.

High Leverage Policy Framework
Drawing from the fields of education policy, school redesign, organizational change, leadership development, and program evaluation, the High Leverage Policy Framework is a detailed exploration of education policy from rationale to development to implementation. By taking into account the larger social and political “ecosystem” in which policy is formed, written, and implemented, this tool provides policy makers and school leaders with an easy-to-use framework for developing effective, high-impact policies in their states, districts, and schools. Using a common definition of high-leverage policy—i.e., policies that not only increase educational equity, aspirations, achievement, and attainment for all students, but that also generate positive change throughout the educational system—the High Leverage Policy Framework is a first step toward a more holistic view of education policy, leading the way for more thoughtful and sustainable guidelines for learning in the 21st century.

FMI: greatschoolspartnership.org/res_tools.html

Learning in Action
This tool helps educators plan a thoughtful, coordinated, purposeful site visit to another school to learn about successful programs and strategies. The guide provides school leaders with a process for turning a site visit into a powerful professional learning experience, including selecting the right schools, investigating the evidence of success, and following up with a strategy for sharing and implementing what they have learned with colleagues. This practical, user-friendly tool features guiding principles for success, checklists for both visiting teams and host schools, and recommended site visit schedules.

FMI: greatschoolspartnership.org/res_tools.html
<table>
<thead>
<tr>
<th>ACTION STEPS</th>
<th>EVIDENCE</th>
<th>TIMELINE</th>
<th>COORDINATOR</th>
<th>PARTICIPANTS</th>
<th>EXTERNAL SUPPORT</th>
<th>RESOURCES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Describe the specific action steps that will support the goal and strategy above.</td>
<td>List the data and evidence that will be collected, tracked, and analyzed.</td>
<td>Indicate when the proposed action steps will be carried out and completed.</td>
<td>Name the lead coordinator and supply any relevant information about the role.</td>
<td>List the names of additional participants and describe their roles in the process.</td>
<td>Indicate what role (if applicable) any external support provider will play in carrying out the action step.</td>
<td>List the financial and material resources that will be needed to carry out the action step.</td>
</tr>
</tbody>
</table>
## Focus on Student Learning

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Weaker Plan</th>
<th>Stronger Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Goals and strategies are defined in such a way as to impact student learning.</strong></td>
<td>Goals define adult performance. The focus of the plan is on structural elements and organizational design. Student learning goals may focus on only one aspect of student performance (e.g., only performance on standardized tests).</td>
<td>Goals clearly define student learning outcomes related to achievement, aspirations and attainment.</td>
</tr>
<tr>
<td><strong>Goals are responsive to student learning needs identified through analysis of relevant data.</strong></td>
<td>Student learning goals are established without a clear connection to the school’s existing data.</td>
<td>Student learning goals are defined based upon a thorough analysis of a wide range of student performance data. Established goals are reasonable, achievable and based on historical student learning data.</td>
</tr>
</tbody>
</table>

## Alignment

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Weaker Plan</th>
<th>Stronger Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Strategies and action steps align clearly with goals.</strong></td>
<td>Strategies don’t directly align with the stated learning goals. Related actions steps are ambiguous or insufficient to implement the suggested strategies.</td>
<td>There is a clear relationship between the suggested strategies and the goals they are intended to support. The suggested action steps provide a clear and detailed way to implement the set of suggested strategies.</td>
</tr>
<tr>
<td><strong>Strategies and action steps are grounded in research-based best practices.</strong></td>
<td>The literature on school improvement provides little or no support that the suggested strategies and/or steps will lead to the attainment of the learning goals.</td>
<td>There is research-based support in the literature that the strategies and action steps proposed in the plan will have a positive impact on teaching and learning.</td>
</tr>
<tr>
<td><strong>All school/district initiatives are integrated into the plan in a cohesive and manageable way.</strong></td>
<td>The action plan proposed is stand-alone and makes little or no mention of other initiatives taking place in the district or school.</td>
<td>The action plan brings all initiatives under one umbrella that also illustrates the cohesive and complementary manner in which they combine to reach the stated learning goals.</td>
</tr>
</tbody>
</table>

<table>
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<tr>
<th>Criteria</th>
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<th>Stronger Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Measurements</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Data are identified to clearly measure the effectiveness of strategies.</td>
<td>Limited data are identified that would provide evidence of progress toward and/or attainment of the goals. Data listed is not relevant to the related strategy or step.</td>
<td>Each action step lists data that can be collected as evidence of progress or completion. The data identified for collection are indicative of the evidence that would be expected if the related step was completed.</td>
</tr>
<tr>
<td>Checkpoints are built into the plan to reflect on the implementation of the action steps.</td>
<td>The data, if listed, is not available during the school year to engage in an analysis and reflection.</td>
<td>There are opportunities throughout the year that allow for data analysis and reflection on leading indicators.</td>
</tr>
<tr>
<td><strong>Leadership</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Leaders for each aspect of the plan are clearly defined.</td>
<td>It is unclear who is responsible for completing each step outlined in the plan.</td>
<td>Each specific action step lists a person who is responsible for ensuring its implementation.</td>
</tr>
<tr>
<td>Leaders of various aspects of the plan hold a leadership position in the school/district.</td>
<td>The responsibility for completing the steps is limited to a handful of individuals who are primarily administrators or who do not hold a leadership position in the school/district.</td>
<td>There is shared responsibility for completing the steps listed in the plan, and the distribution among the school/district leaders is fair and diverse.</td>
</tr>
<tr>
<td>Mid-year reflection opportunities are built into the plan.</td>
<td>There are few, if any, opportunities for the leadership team to reflect upon the progress of the plan.</td>
<td>There are scheduled opportunities for the leadership team to examine the data collected to date and engage in a reflection on progress in order to consider possible adjustments.</td>
</tr>
<tr>
<td><strong>Resources</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resources indicate a careful analysis of internal and external assets and barriers.</td>
<td>If resources are suggested, they are insufficient to support the completion of the step.</td>
<td>The resources suggested to support the steps are sufficient to ensure effective implementation and take advantage of the assets already available.</td>
</tr>
<tr>
<td>Local resources are identified to enhance the local school budget.</td>
<td>The resources listed do not take into consideration the existing assets and/or barriers in the school/district.</td>
<td>Community engagement strategies and resources are clearly identified and relevant to the action plan.</td>
</tr>
</tbody>
</table>
**Tuning A Plan**

**Time**
Approximately 1 hour

**Roles**
1. Presenter – Leadership Team representative
2. Facilitator – Volunteer
3. Note Taker - Volunteer

1. **Presentation** (15 minutes)
   - Context for plan
   - Goals that drive the plan
   - Focusing question for feedback: What is one specific issue or challenge that would be most beneficial to have your colleagues’ best thinking to help you think through?

2. **Clarifying Questions** (5 minutes)
   - Clarifying questions are matters of fact. Save substantive issues for later.
   - The facilitator is responsible for making sure that clarifying questions are really clarifying.

3. **Examination of the Plan** (10 minutes)
   - Participants read the plan, taking notes on where the plan seems “in tune” with the stated goals and where there might be problems.

4. **Pause to Reflect on Feedback** (2-3 minutes)

5. **Feedback** (15-20 minutes)
   Participants provide:
   - Warm Feedback: What are the strengths of this plan? What resonates with you? What do you like about it?
   - Cool Feedback: What’s unclear or missing? What should be added or revised so that the plan is improved

6. **Debrief** (2-3 minutes)
   In what ways did this protocol help us accomplish the goal of provide helpful feedback and address the presenting team’s focus question?
   As a group, what might we need to attend to as we continue to build our collective efficacy?