

# Leading Observation Instrument Handbook

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## The Leading Observation Instrument (LdOI)

The REIL Leading Observation Instrument is the result of a collaborative effort to create a cross-district building-level administrator observation tool to be used as part of a performance-based evaluation system. The LdOI is a research-based instrument<sup>1</sup> comprised of five rubrics and 23 elements that have been aligned to the Ontario Leadership Framework and the Professional Standards for Educational Leaders. The LdOI is designed to allow evaluators to precisely describe and compare differences in performance, encourage dialogue about effective teaching and leading, and support differentiated areas for professional growth. A unique aspect of the LdOI is the

inclusion of required observations of specific settings in the field. This direct observation of building-level administrator actions/behaviors assists in the provision of specific feedback based on the elements in the LdOI. For example, a superintendent will observe a principal facilitating a leadership team meeting and collect evidence related to specific rubric elements such as *group facilitation* or *accountability for goals*. In another example, a principal will observe an assistant

principal leading a parent meeting and collect evidence related to *mutual trust and respect*, *school resource management*, and *communication systems*. In addition to observing building-level administrators in specific settings, evaluators will also review specific documentation (e.g., Continuous Improvement Plans, instructional support plans, educator goal plans, student achievement data, management system artifacts, teacher/school observational data, and survey results) as a means of assessing a leader's capacity to plan for and document the work of their school.



<sup>1</sup> Several sources were used in creating and revising the LdOI including the ISLLC Leadership Standards (2012), the CCSSO Professional Standards for Educational Leaders (2015), and the Ontario Leadership Framework (2006). The full list of resources can be found on the acknowledgement page of the Leading Observation Instrument.

# The Structure of the Leading Observation Instrument



## Rewarding Excellence in Instruction & Leadership Leading Observation Instrument



### BUILDING RELATIONSHIPS RUBRIC

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



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



The highlighted gray bar near the top identifies the name of the rubric. Directly below the gray bar is the *purpose statement* for the rubric. The purpose statement provides the overarching theme of the rubric and serves as a reminder of how the elements of that particular rubric are designed to support school administrators.



Below the purpose statement you will see a color-coded bar. The color-coded bar lists the numbers 0 to 4. The numbers represent performance levels intended to delineate the knowledge, skills, and practices school leaders are able to demonstrate and provide guidance for growth in that area. When scoring, keep in mind that it is *not* necessary for a building-level administrator to demonstrate all of the indicators at one performance level in order to be scored at the next performance level. For example, a building-level administrator does not need to meet all of the criteria at levels 1 and 2 in order to score at a level 3.

C

At the top of the column on the left-hand side of the page is the word “Element”. Each rubric contains several elements. For example, the Building Relationships rubric contains the following elements: Accessibility (shown here), Mutual Trust & Respect, and Conflict Facilitation.

D

Each element is defined by *descriptors*, which describe specific leader actions. An evaluator will gather evidence of these leader actions via observations, documentation, and surveys. As with any reliable rubric, the criteria at each level are defined clearly enough to ensure that scoring is accurate, unbiased, and consistent.

E

In the left-hand column, each element connects to five vertical bars titled Business or Parent Meeting, Leadership Team Meeting, Professional Learning, Instructional Conference, and Site Visit. These vertical bars indicate the observation setting in which the element is scored. Not all of the elements are scored within a particular setting. Some elements, such as *CIP: Goal Setting* would be scored using documentation that would be discussed during conferences.

F

Aligned to the descriptor language are the letters *O* (observation), *D* (documentation), and *S* (survey). These letters identify the specific type of evidence to collect in order to score each element.

For example, for the element *Accessibility*, the evaluator will observe a building-level administrator conducting a Site Visit, as evidenced by the (O) at the end of the first paragraph in the descriptor language. The (D) denotes that the evaluator will review documentation, in this case, Management System Artifact(s). This is because evidence of accessibility can be observed but the evaluator will also want to assess the system that the building-level administrator has in place for ongoing and regular accessibility. The sharing of documentation may take place at the time of the observation or during an LdOI Conference. The evaluator will also incorporate Parent, Staff, and possibly Student Survey data, as evidenced by the (S) at the end of the bottom two paragraphs in the descriptor language.

## Observation Settings and Documentation

The annual evaluation process of a building-level administrator incorporates multiple measures including observation, documentation, and student growth results. This section highlights the observation settings and documentation that will partially inform the evaluation outcome (i.e., highly effective, effective, developing, ineffective) for building-level administrators. A description of each observation setting and documentation is included below.

### Observation Settings

<b>Business or Parent Meeting</b>					
Meeting to conduct business related to school operations/management (e.g., faculty meeting, business partnership meeting, community meeting, parent meeting, curriculum meeting).					
The administrator establishes rapport and collaboratively facilitates the meeting to establish communication and systems to promote shared decision making for issues, planning, systems refinement, use of resources, or other needs of the school. Participants in the meeting may include staff members, students, community members, and/or parents.	<table border="1" style="width: 100%;"> <thead> <tr> <th style="background-color: #cccccc;">LdOI Elements Scored</th> </tr> </thead> <tbody> <tr> <td>→ School Resource Management</td> </tr> <tr> <td>→ Mutual Trust &amp; Respect</td> </tr> <tr> <td>→ Communication Systems</td> </tr> </tbody> </table>	LdOI Elements Scored	→ School Resource Management	→ Mutual Trust & Respect	→ Communication Systems
LdOI Elements Scored					
→ School Resource Management					
→ Mutual Trust & Respect					
→ Communication Systems					

<b>Leadership Team Meeting</b>								
Regularly scheduled meetings where the leadership team (building-level administrators and designated staff) meet to monitor the school's progress toward goals.								
The building-level administrator facilitates a meeting to support student achievement in alignment to the school's goals, vision, and mission. The agenda for the meeting focuses on the instructional needs of teachers to best support continued academic progress of students (e.g., planning for future training or coaching for teacher sub-groups or individuals based on teacher data, review of student achievement progress toward goals, and/or adjustment of continuous improvement plans all relative to the mission and vision of the school and school-wide practices). Participants include those individuals directly responsible for monitoring progress on and achieving the academic goals of the school (e.g., principal, assistant principal, instructional coaches, Multi-Classroom Leaders, department heads, grade level chairs, team leads, Collaborative Team Meeting facilitators).	<table border="1" style="width: 100%;"> <thead> <tr> <th style="background-color: #cccccc;">LdOI Elements Scored</th> </tr> </thead> <tbody> <tr> <td>→ Shared Purpose</td> </tr> <tr> <td>→ Culture of Improvement</td> </tr> <tr> <td>→ Group Facilitation</td> </tr> <tr> <td>→ Recruitment, Retention, &amp; Succession Planning</td> </tr> <tr> <td>→ Professional Development: Adjusting Support</td> </tr> <tr> <td>→ Accountability for Goals</td> </tr> </tbody> </table>	LdOI Elements Scored	→ Shared Purpose	→ Culture of Improvement	→ Group Facilitation	→ Recruitment, Retention, & Succession Planning	→ Professional Development: Adjusting Support	→ Accountability for Goals
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→ Recruitment, Retention, & Succession Planning								
→ Professional Development: Adjusting Support								
→ Accountability for Goals								

<b>Professional Learning</b> Meetings or training sessions focused specifically on student academic progress and educator professional development.			
<p>The building-level administrator provides purposeful opportunities for teachers to engage in professional learning and collaboration connected to school goals aimed at increasing educator effectiveness and student learning. Participants in the professional learning setting include building-level administrators, teachers, and possibly master educators (coaches or mentors). Examples of professional learning settings could include collaborative learning team meetings, half-day professional development or release time workshops. Other staff members may provide the content learning as long as the building-level administrator takes an active role in connecting the professional learning experience to the mission, goals, and both past and future professional learning.</p>	<table border="1" style="width: 100%;"> <thead> <tr> <th style="background-color: #cccccc;">LdOI Elements Scored</th> </tr> </thead> <tbody> <tr> <td> <ul style="list-style-type: none"> <li>→ Change Process</li> <li>→ Professional Development: New Learning</li> </ul> </td> </tr> </tbody> </table>	LdOI Elements Scored	<ul style="list-style-type: none"> <li>→ Change Process</li> <li>→ Professional Development: New Learning</li> </ul>
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<b>Instructional Conference</b> A portion of the teacher observation cycle (pre- and post-conference) where a building-level administrator conferences with a teacher to: gather data/evidence for scoring; provide specific feedback; and share the outcomes (observation scores) of the observation cycle.			
<p>The building-level administrator conducts a pre- and post-conference as part of an individual teacher’s observation cycle in order to gather data/evidence for scoring, provide specific feedback, and share the outcomes of the observation cycle. The script of the classroom lesson is also viewed and analyzed at the time of the instructional conference observation.</p>	<table border="1" style="width: 100%;"> <thead> <tr> <th style="background-color: #cccccc;">LdOI Elements Scored</th> </tr> </thead> <tbody> <tr> <td> <ul style="list-style-type: none"> <li>→ Observation &amp; Evaluation of Instruction: Scripting</li> <li>→ Pre &amp; Post Conference: Data Gathering</li> <li>→ Post Conference: Reinforcement &amp; Refinement</li> </ul> </td> </tr> </tbody> </table>	LdOI Elements Scored	<ul style="list-style-type: none"> <li>→ Observation &amp; Evaluation of Instruction: Scripting</li> <li>→ Pre &amp; Post Conference: Data Gathering</li> <li>→ Post Conference: Reinforcement &amp; Refinement</li> </ul>
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<b>Site Visit</b> A structured visitation of a school site.			
<p>The building-level administrator is joined by the LdOI evaluator for a campus visit designed to provide an opportunity to see the building-level administrator in action conducting school business and engaging in instructional leadership activities. For example, a site visit could include walk-throughs of classrooms as well as visits to collaborative team meetings. In addition, a building-level administrator may highlight and discuss specific documentation such as academic priorities, safety or culture goals, progress of students, progress of individual or groups of teachers relative to rubric elements, etc.</p>	<table border="1" style="width: 100%;"> <thead> <tr> <th style="background-color: #cccccc;">LdOI Elements Scored</th> </tr> </thead> <tbody> <tr> <td> <ul style="list-style-type: none"> <li>→ Accessibility</li> <li>→ Management Systems</li> <li>→ Collaborative Learning Structures</li> <li>→ Supervision of Written, Taught, &amp; Tested Curriculum</li> <li>→ Implementation of Strategies</li> </ul> </td> </tr> </tbody> </table>	LdOI Elements Scored	<ul style="list-style-type: none"> <li>→ Accessibility</li> <li>→ Management Systems</li> <li>→ Collaborative Learning Structures</li> <li>→ Supervision of Written, Taught, &amp; Tested Curriculum</li> <li>→ Implementation of Strategies</li> </ul>
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## Documentation

Documentation is to be reviewed in conjunction with observations and conferences. The documentation and leader's conversations about documentation are to be used to inform the leader's overall observation scores. It is not recommended that evaluators review documentation in isolation.

### **Continuous Improvement Plans**

An evidence-based, school-specific plan outlining student achievement goals and the action plan (strategies, measure of success, person(s) responsible, resources) to achieve those goals.

Continuous Improvement Plans should be reviewed at least two times during the school year, most likely during the LdOI Conferences.	LdOI Elements Scored
	→ CIP: Goal Setting → CIP: Action Plans → School Resource Management → Accountability for Goals

### **Instructional Support Plans**

Guides the planning and monitoring of individual/group professional learning goals.

Instructional Support Plans are reviewed at least once, most likely during the Leadership Team Meeting visit.	LdOI Elements Scored
	→ Professional Development: Adjusting Support

### **Educator Goal Plans**

Individual educator professional development plans to support educator development in targeted areas.

Educator Goal Plans should be reviewed at least two times during the school year, most likely during the LdOI Conferences.	LdOI Elements Scored
	→ Educator Goal Plans

### **Student Achievement Data**

Student-, grade-/team- and school-level student growth data from state- and locally- administered assessments.

Student Achievement Data is reviewed at least one time during the school year, most likely at the second LdOI Conference.	LdOI Elements Scored
	→ Accountability for Goals



### Management System Artifacts

Documentation related to management of the school (e.g., master schedule, teacher assignments, written communications, calendar, spreadsheets).

Different Management System Artifacts are reviewed throughout the year. It is recommended that evaluators and building-level administrators have a clear understanding at the beginning of the year of what management system artifacts will be reviewed and discussed during which observation settings and conferences.	<b>LdOI Elements Scored</b>
	→ School Resource Management → Accessibility → Communication Systems → Management Systems → Recruitment, Retention, & Succession Planning → Observation & Evaluation of Instruction: Scoring Accuracy → Collaborative Learning Structures → Implementation of Strategies

### Teacher/School Observational Data

Results from educator evaluation process including observation scores, value-added scores, and REIL scores; results from classroom walk-throughs.

Teacher/School Observational Data are reviewed at least two times during the school year, once using the script of the lesson from the instructional conference and once during the Site Visit.	<b>LdOI Elements Scored</b>
	→ Observation & Evaluation of Instruction: Scripting → Supervision of Written, Taught, & Tested Curriculum

### Parent Survey

Survey utilized to capture parent perceptions related to elements on the Leading Observation Instrument.

The parent survey results are reviewed at least one time during the school year.	<b>LdOI Elements Scored</b>
	→ Accessibility → Mutual Trust & Respect → Communication Systems

### Staff Survey

Survey utilized to capture staff perceptions related to elements on the Leading Observation Instrument.

The staff survey results are reviewed at least one time during the school year.	<b>LdOI Elements Scored</b>
	→ Accessibility → Mutual Trust & Respect → Change Process → Communication Systems → Management Systems

## A Note about Surveys

Districts have found it beneficial to conduct parent, staff, and student surveys during the middle of the school year so that the results best reflect the current year with the current leader while there is still time to make adjustments. Other districts do a mid-year survey for feedback to the leaders and another end-of-year survey that is then used to inform the LdOI evidence. In order to meet this timeline, it is important to determine what surveys will be used and how the data will be interpreted.

LdOI Evaluators could ask themselves the following questions as they plan for the district use of surveys:

- ***What surveys should we use?***
  - *Should we use surveys specifically aligned to LdOI elements and performance levels?*
  - *Should we use existing surveys and if so, which questions align with Accessibility, Mutual Trust & Respect, Change Process (Staff only), Communication, and Management Systems (Staff only)?*
  - *Are we requiring the same survey across the district?*
  - *If we have more than one leader at a campus on the LdOI, do we need different surveys for each leader for staff? Do we need different surveys for each leader for parents?*
  
- ***How should we interpret the survey data (by role, based on initiatives, differences in grades, etc)?***

**Some examples of how survey data may be interpreted include:**

- Evaluators use survey data as part of a leader conference where the leader speaks to the results and their leadership practices.
- Evaluators independently interpret the results to allow for expected differences across the district (Elementary vs. Middle School results, initiatives, leaders who are pushing and getting expected backlash/leaders who are well-loved but not showing growth, etc.)
- Evaluators use the data consistently across the district with specific survey scores being converted into 0-4 LdOI scores.

It is recommended that these decisions are made and communicated at the beginning of the year so that evaluators and building-level administrators have the same understanding.

## The Conference Cycle

Over the course of a school year, the building-level administrator (BLA) will participate in at least two LdOI conferences with their assigned evaluator(s) in order to receive feedback on progress relative to the *Leading Observation Instrument* and student academic progress. Evaluators will review LdOI evidence collected through observations and discussions around documentation and surveys to **determine one final score for each LdOI element**. The evaluators will also use the evidence collected to determine a Reinforcement and a high-leverage Refinement at each conference. Ideally, the focus of the first conference includes discussions about the current year's CIP Goals and Action Plans, the BLA's own Educator Goal Plan, the BLA's plans to develop EGPs with their staff, and BLA's plans to increase inter-rater agreement and reliability in evaluations. The second conference would provide an opportunity to discuss the progress and outcomes of the CIP Goals and Action Plans, EGPs, and survey results.

In order to support evaluators with the observation and conference process, a recommended sequence has been identified and is shown on page 13. Your district may certainly determine your own conference process.

### Conference 1: Fall

- CIP Goals, Action Plans & School Resource Management (CIP)
- EGP plans (EGPs)
- Plan for Scoring Accuracy (Management System Artifact)
- Communication Systems (Management system Artifact)

### Conference 2: Spring

- CIP Goals: Revisions and Monitoring
- Accountability for Goals (CIP, Student Achievement Data)
- Recruitment, Retention, and Succession Planning (Management System Artifacts)
- EGP progress (EGPs)
- Scoring Reliability and Accuracy (CEA and Management System Artifact)
- Surveys

## Considerations for Determining LdOI Observation and Conference Plans

There is a great deal of flexibility in how districts schedule and conduct LdOI observations and conferences. This flexibility allows districts to make decisions that best fit their needs. The flexibility also increases the responsibility of evaluators to be very clear about the district's choices on how they will conduct observations and conferences. Evaluators and building-level administrators (BLAs) should think through and determine an evaluation process that will be equitable, transparent, reasonable to schedule, job-embedded, and support leadership growth and feedback.

LdOI evaluators and school leaders may ask themselves the following questions as they plan for their district's LdOI implementation:

- *Are there elements not listed in a setting that we consider helpful and want to observe?*
- *How many times will we conduct each type of setting or conference? **The minimum that every setting is observed is at least once and each building-level administrator must have at least two LdOI conferences.** Districts may do more.*
- *Are there groups, such as new or developing principals or those leading schools in improvement, for which we may want to see particular settings more than one time?*
- *Will we have one LdOI evaluator evaluate all settings for a building-level administrator or will there be different evaluators for different settings? If there are multiple evaluators, how will we determine reinforcements, refinements, and who will conduct LdOI conferences and enter scores?*
- *Are our observations all announced and scheduled? If there is a consistent Leadership Team Meeting time, is this a setting that might include two observations, one announced and one unannounced?*
- *Will we need short pre or post meetings with the building-level administrator to help understand the context of the observation or have a discussion about documentation? Do we have a separate appointment and location for this?*
- *Will evaluators want to conduct more than one setting during a visit to the school? For example, would we rather block out half a day at a school to conduct a Site Visit while we are already there for an Instructional Conference? If we are there scoring observation settings, would we want to conduct one of our two LdOI Conferences immediately after our observations? Think through scheduling implications.*
- *How will we gather and document evidence throughout the year since observations, documentation, and survey evidence from the year are to be used together in determining **one final element score**?*

Example: This district has decided that they want to see a Leadership Team Meeting in the first half of the year and conduct the Professional Learning and Site Visit settings' observations in the second half of the year. They chose to have the Business or Parent Meeting and an Instructional Conference occur throughout the year and evidence for these two settings would be included in the appropriate conference. Though they give surveys to staff and parents in December, the discussion of the survey results would occur in the second LdOI conference.

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

Sep-Apr	<ul style="list-style-type: none"> <li>Business or Parent Meeting</li> <li>Instructional Conference</li> </ul>	Discuss at either conference	
Sep-Dec (Semester 1)	<ul style="list-style-type: none"> <li>Leadership Team Meeting</li> </ul>	Conference 1	CIPs (Goals & Action Plans); Educator Goals Plans (for BLA and Staff)
Jan-Apr (Semester 2)	<ul style="list-style-type: none"> <li>Professional Learning</li> <li>Site Visit</li> </ul>	Conference 2	Scoring accuracy, EGP completion, Implementation of Strategies

Determine what works for your district and ensure that evaluators and building-level administrators have a clear understanding of the expectations and that those expectations are clearly communicated.

# Gathering Evidence and Determining Scores

Districts have flexibility in scheduling and conducting observations and conferences in a way that best fits their needs. What follows are some templates that could support districts in gathering and tracking evidence and scores throughout the year.

LdOI evaluators and leaders may ask themselves the following questions regarding scoring as they plan for the district LdOI implementation:

- *If elements or settings are scored more than one time, how do we determine a final score for an element?*
  - *Do we look for a preponderance of evidence over the year and then score at the end of the year?*
  - *Do we score each time?*
  - *If we have multiple scores for an element, do we weight scores more heavily at the end of the year or after we have provided feedback?*
  - *Do we average scores throughout the year?*

Below is an example of a tracker that an LdOI evaluator might use to keep track of a school leader's scores throughout the year. Though evaluators may keep analyzed scripts, artifacts, and setting or conference notes, the spreadsheet below summarizes the overall scores for a school leader's settings. In this example, the district observes a Leadership Team Meeting and Professional Learning setting and conducts a Site Visit in one day. They observe each of them twice, plus an individual visit for Business or Parent Team Meeting and Instructional Conferencing. The document scores are separated based on when the document would be discussed.

Leader:	Conf 1:	Fall Visit:				Spring:				BPTM:	Inst Conf:			Conf 2:											
Leading Observation Instrument	Continuous Improvement	Educator Goal Plans	Management	Leadership Team Meeting	Professional Learning	Site Visit	Instructional Support Plans	Management	Teacher/School	Leadership Team Meeting	Professional Learning	Site Visit	Instructional Support Plans	Management	Teacher/School	Business (Parent Meeting)	Management	Instructional Conference	Teacher/School	Management	Continuous Improvement	Educator Goal Plans	Student Achievement Data	Survey Data	Notes
Shared Purpose																									
Setting & Communicating Direction																									
Building Relationships																									
Designing the Organization																									
Leading Instruction																									
Ensuring Accountability																									

# Rubrics by Setting with Probing Questions and Considerations

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# LEADERSHIP TEAM MEETING

Leader: \_\_\_\_\_

Date: \_\_\_\_\_

## SETTING & COMMUNICATING DIRECTION RUBRIC

### *Shared Purpose Element*

<b>4</b>	<ul style="list-style-type: none"> <li>Enlists stakeholders and ensures the shared vision for high student achievement and college and career readiness is developed, maintained, <b>clearly articulated, and/or</b> implemented <b>by nearly all staff members</b>.</li> <li>Clearly communicates connection of academic outcomes <b>and decisions</b> to vision and CIP goals, and <b>empowers staff members to lead conversations</b> that connect short-term and long-term vision to CIP goals and activities.</li> </ul>
<b>3</b>	<ul style="list-style-type: none"> <li><b>Enlists stakeholders and ensures the shared</b> vision for high student achievement and college and career readiness is <b>developed, maintained, and/or implemented</b>.</li> <li><b>Clearly communicates</b> connection of academic outcomes to vision <b>and</b> CIP goals evidenced by <b>staff members able to clearly articulate and take action on CIP goals and explain what the vision looks like in the short-term and long-term</b>.</li> </ul>
<b>2</b>	<ul style="list-style-type: none"> <li><b>Ensures vision and mission promotes high student achievement and college and career readiness.</b></li> <li><b>References connection</b> of academic outcomes to school vision and/or CIP as evidenced by:               <ul style="list-style-type: none"> <li>Posted vision/mission.</li> <li>References in planning sessions/meetings.</li> <li>References in communication materials.</li> </ul> </li> </ul>
<b>1</b>	<ul style="list-style-type: none"> <li>References school vision as evidenced by:               <ul style="list-style-type: none"> <li>Posted vision/mission.</li> <li>Referenced in planning sessions/meetings.</li> <li>Referenced in communication materials.</li> </ul> </li> </ul>
<b>0</b>	

**Notes:**



Consider meeting with leader just before the leadership team meeting to review documentation and have a conversation around the CIP goals and their monitoring process. This should help contextualize the leadership team meeting so you see how the observed meeting fits within the short-term and long-term goals for the school. Determine a few questions that will help you tease out evidence for an effective and consistent process for horizontal and vertical goals.



## BUILDING RELATIONSHIPS RUBRIC

### *Culture of Improvement Element*

4	<ul style="list-style-type: none"><li>Engages in critical conversations in a constructive manner. <b>Encourages</b> differing perspectives (including voices of dissent) to improve <b>school-wide</b> practices, <b>foster innovation</b>, and build consensus.</li></ul>
3	<ul style="list-style-type: none"><li>Engages in critical conversations in a constructive manner and <b>incorporates different perspectives (including voices of dissent) to improve practices and build consensus.</b></li></ul>
2	<ul style="list-style-type: none"><li>Engages in critical conversations in a <b>constructive</b> manner.</li></ul>
1	<ul style="list-style-type: none"><li>Engages in critical conversations in a neutral manner.</li></ul>
0	

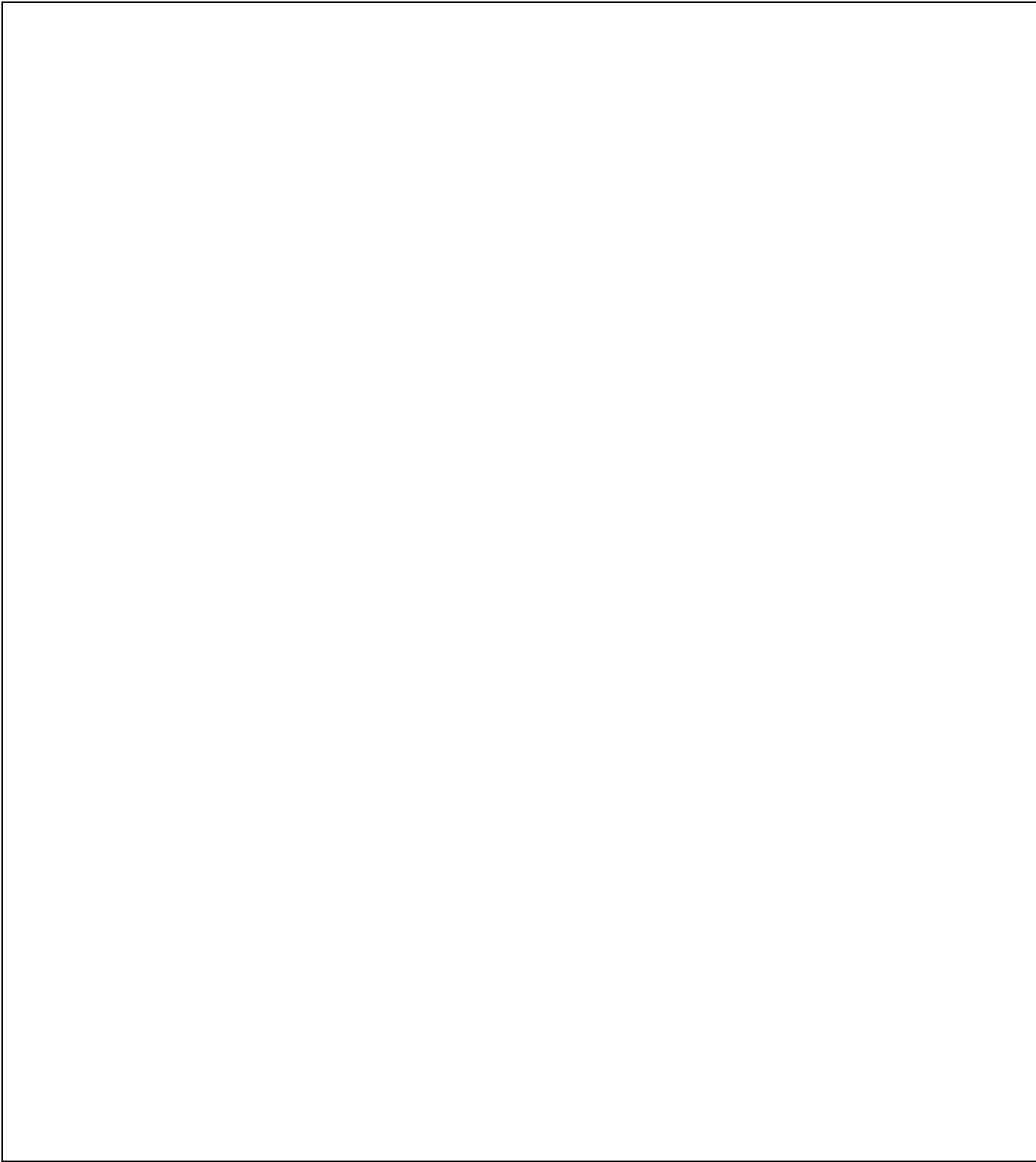
Notes:

## DEVELOPING THE ORGANIZATION RUBRIC

### *Group Facilitation Element*

<b>4</b>	<ul style="list-style-type: none"> <li>• Uses agenda with clearly stated prioritized objectives</li> <li>• <b>Harnesses the expertise of participants to monitor progress, advance shared goals, and develop quality products</b></li> <li>• <b>Participants share in the use of facilitation strategies</b> <ul style="list-style-type: none"> <li>○ <i>Maintains neutrality</i></li> <li>○ <i>Clarifies role with group</i></li> <li>○ <i>Focuses group energy</i></li> <li>○ <i>Keeps group on task</i></li> <li>○ <i>Encourages everyone to participate</i></li> <li>○ <i>Ensures safety in sharing ideas.</i></li> </ul> </li> <li>• <b>Participants</b> reinforce the norms and direct processes to be used in the meeting to match meeting’s purpose                             <ul style="list-style-type: none"> <li>○ <i>Dialogue, reflection, shared decision making, planning or problem solving</i></li> </ul> </li> <li>• <b>Checks for understanding with meeting participants</b> to ensure clear expectations for next steps, responsible persons, due date, and manner of follow up.</li> </ul>
<b>3</b>	<ul style="list-style-type: none"> <li>• Uses agenda with clearly stated <b>prioritized</b> objectives, makes efficient use of time</li> <li>• Makes progress on <b>priority</b> action items</li> <li>• Uses <b>nearly all</b> of the following facilitation strategies:                             <ul style="list-style-type: none"> <li>○ <i>Maintains neutrality</i></li> <li>○ <i>Clarifies role with group</i></li> <li>○ <i>Focuses group energy</i></li> <li>○ <i>Keeps group on task</i></li> <li>○ <i>Encourages everyone to participate</i></li> <li>○ <i>Ensures safety in sharing ideas.</i></li> </ul> </li> <li>• <b>Reinforces shared accountability</b> for norms and directs processes and resources to be used in the meeting to match meeting’s purpose                             <ul style="list-style-type: none"> <li>○ <i>Dialogue, reflection, shared decision making, planning or problem solving</i></li> </ul> </li> <li>• Ensures clear identification of next steps, <b>responsible persons, and when task should be completed.</b></li> </ul>
<b>2</b>	<ul style="list-style-type: none"> <li>• <b>Uses agenda with</b> clearly stated objectives, <b>makes efficient use of time</b></li> <li>• <b>Makes progress on majority of action items</b></li> <li>• <b>Uses a few of the</b> following facilitation strategies:                             <ul style="list-style-type: none"> <li>○ <i>Maintains neutrality</i></li> <li>○ <i>Clarifies role with group</i></li> <li>○ <i>Focuses group energy</i></li> <li>○ <i>Keeps group on task</i></li> <li>○ <i>Encourages everyone to participate</i></li> <li>○ <i>Ensures safety in sharing ideas.</i></li> </ul> </li> <li>• <b>Directs the norms, processes, and resources to be used in the meeting to match meeting’s purpose</b> <ul style="list-style-type: none"> <li>○ <i>Dialogue, reflection, shared decision-making, planning or problem solving</i></li> </ul> </li> <li>• <b>Ensures all next steps are clearly identified.</b></li> </ul>
<b>1</b>	<ul style="list-style-type: none"> <li>• Clearly states objectives to provide focus, adheres to agenda, and uses one of the following facilitation strategies:                             <ul style="list-style-type: none"> <li>○ <i>Maintains neutrality</i></li> <li>○ <i>Clarifies roles with group</i></li> <li>○ <i>Focuses group energy</i></li> <li>○ <i>Keeps group on task</i></li> <li>○ <i>Encourages everyone to participate</i></li> <li>○ <i>Ensure safety in sharing ideas.</i></li> </ul> </li> <li>• States the norms or protocols and garners support from group and uses communication strategies for specific audience.</li> <li>• Identifies next steps</li> </ul>
<b>0</b>	

Notes:



Consider talking with the leader & reviewing documents to support **observation evidence** (e.g. process for prioritizing objectives, agenda/ minutes from 3 consecutive meetings).

## DEVELOPING THE ORGANIZATION RUBRIC

### *Recruitment, Retention, & Succession Planning Element*

4	<ul style="list-style-type: none"><li>Identifies, equips, and places staff members in career pathways positions or intentional assignments with effective formal and informal mentoring to build leadership capacity.</li></ul>
3	<ul style="list-style-type: none"><li>Provides formal or informal leadership opportunities to mentor emerging staff leaders by delegating appropriate leadership tasks to competent staff members, checking on progress, and providing support.</li></ul>
2	<ul style="list-style-type: none"><li>Identifies, develops, and advises effective staff members in order to build leadership capacity consistent to meet school needs.</li></ul>
1	<ul style="list-style-type: none"><li>Identifies developing staff members and pairs with effective staff members for informal mentoring and models of effective practice.</li></ul>
0	

Notes:



Some leaders may not have much discretion in staffing. Work together at the beginning of the year to determine a focus, specifically as it relates to this element. Some schools have Assistant Principals focus on classified staff, paraprofessionals, interns, and/or beyond-the-school day staffing. Some schools split their school teams up so that leaders support a cadre of grade-level, paraprofessional, and classified staff. Determine this before you begin observing so leaders can proactively work toward recruitment, placement, retention, & succession planning.



The descriptors for the observation and documentation for “Recruitment, Retention, and Succession Planning” are slightly different. Consider both as you use your evidence to determine a “Recruitment, Retention, & Succession Planning” score.

**DEVELOPING THE ORGANIZATION RUBRIC**

***Recruitment, Retention, & Succession Planning Element***

***Documentation: Management System Artifacts***

<b>4</b>	<ul style="list-style-type: none"> <li>Makes high quality staff selections, ensures equitable distribution of highly effective staff members, and establishes systems for recruiting and <b>retaining highly effective educators. Ensures succession plans for every position in the school.</b></li> <li><b>Identifies, equips, and places staff members in career pathways positions or intentional assignments</b> with effective formal and informal mentoring to build leadership capacity.</li> </ul>
<b>3</b>	<ul style="list-style-type: none"> <li>Makes high quality staff selections, ensures equitable distribution of highly effective staff members, <b>and establishes systems for recruiting high quality candidates</b> (<i>i.e. pre-service internships or student teaching</i>).</li> <li><b>Provides formal or informal leadership opportunities</b> to mentor emerging staff leaders by delegating appropriate leadership tasks to competent staff members, checking on progress, and providing support.</li> </ul>
<b>2</b>	<ul style="list-style-type: none"> <li>Makes high quality staff selections <b>and ensures equitable distribution of highly effective staff members.</b></li> <li>Identifies, <b>develops, and advises</b> effective staff members in order to build leadership capacity consistent to meet school needs.</li> </ul>
<b>1</b>	<ul style="list-style-type: none"> <li>Makes high-quality staff selections and placements.</li> <li>Identifies developing staff members and pairs with effective staff members for informal mentoring and models of effective practice.</li> </ul>
<b>0</b>	

**Notes:**



At level 4, the intent is that the leader ensures succession plans for *every* position in the school (or program in the case of an AP or leader in charge of staffing for a specific program). This includes classified and non-teaching staff.



The descriptors for the observation and documentation for “Recruitment, Retention, and Succession Planning” are slightly different. Consider both as you use your evidence to determine a “Recruitment, Retention, & Succession Planning” score.

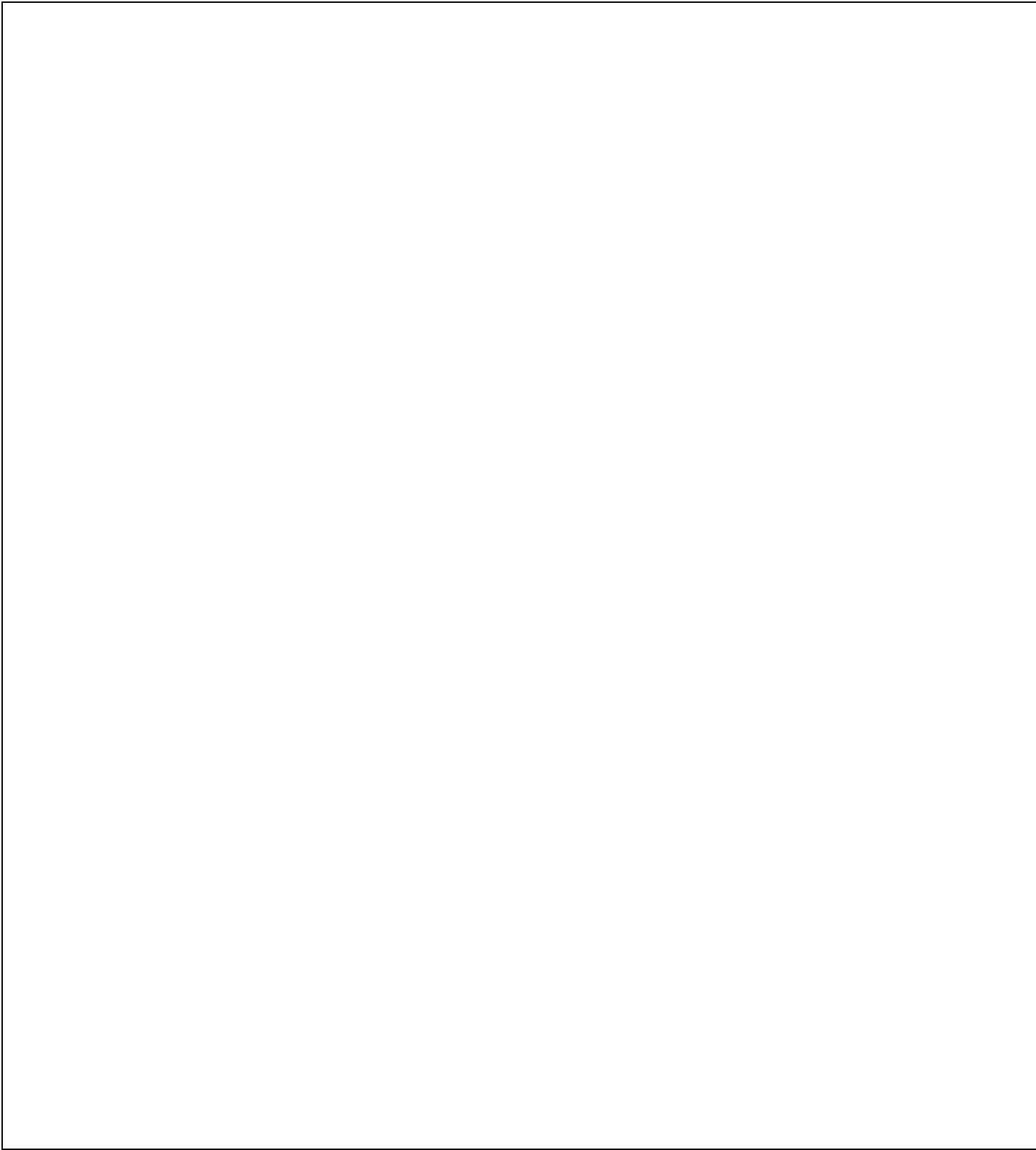
- **Share the plans you have made to provide formal or informal leadership opportunities to mentor emerging staff leaders.**
- **How are school/district administrators building capacity among the staff to improve teaching and learning?**
- **What have you done to ensure the retention of highly effective teachers and coaches in your building?**
- **What are your plans for staffing and placements for next year to ensure equitable distribution of high-quality staff?**

## LEADING INSTRUCTION RUBRIC

### *Professional Development: Adjusting Support Element*

<b>4</b>	<ul style="list-style-type: none"> <li>• <b>Accurately</b> analyzes student learning data and <b>in-depth</b> patterns of teacher progress, <b>relevant</b> teacher conceptions/misconceptions, and <b>anecdotal information about teacher</b>.</li> <li>• Accurately identifies high priority next areas for refinements in content, rigor, <b>and/or</b> pedagogical shifts for differentiated teacher groups <b>and targeted student groups</b>.</li> <li>• <b>Interprets</b> the impact of <b>the type of instructional support and the strategy for delivery (i.e. frequency, duration, and level of scaffolding)</b> on the progress of differentiated groups or individual teachers and makes adjustments to <b>the type of instructional support and strategies for delivery (i.e. frequency, duration, level of scaffolding)</b> to remove obstacles and improve student achievement.</li> </ul>
<b>3</b>	<ul style="list-style-type: none"> <li>• <b>Analyzes student learning data and patterns</b> of teacher progress, <b>teacher conceptions, and teacher misconceptions</b>.</li> <li>• <b>Accurately</b> identifies <b>high priority next areas</b> for refinement in content, rigor, <b>and/or</b> pedagogical shifts for differentiated groups.</li> <li>• <b>Interprets the impact of instructional support strategies on the progress of differentiated groups or assigned individual teachers and</b></li> <li>• <b>Makes adjustments to future instructional support to remove obstacles and improve student achievement.</b></li> </ul>
<b>2</b>	<ul style="list-style-type: none"> <li>• <b>Collects and analyzes teacher progress monitoring evidence of instructional effectiveness.</b></li> <li>• <b>Identifies needs for refinements in content, rigor, and/or pedagogical shifts for differentiated groups.</b></li> <li>• <b>Identifies relationships between professional development efforts and impact on student learning to adjust instructional support for teacher groups.</b> <ul style="list-style-type: none"> <li>○ <i>Planning, content or pedagogy training, application/practice in collaborative teams, observations, coaching, checking for understanding.</i></li> </ul> </li> </ul>
<b>1</b>	<ul style="list-style-type: none"> <li>• Maintains records of teacher progress and articulates the progress and potential obstacles of individual teachers.</li> <li>• Identifies refinements in pedagogical shifts for at least one teacher group.</li> <li>• Identifies areas of professional development support that need adjustment.</li> </ul>
<b>0</b>	

**Notes:**



*Consider talking with the leader and/or reviewing documents in conjunction with the observation (e.g. Instructional Support Plans, Coaching Plans, CIP PD documents and action plans, EGP/Differentiated PD outcomes).*



**LEADING INSTRUCTION RUBRIC**

*Professional Development: Adjusting Support Element*  
*Documentation: Instructional Support Plans*

<b>4</b>	<ul style="list-style-type: none"> <li>• <b>Accurately</b> analyzes student learning data and <b>in-depth</b> patterns of teacher progress, <b>relevant</b> teacher conceptions/misconceptions, and <b>anecdotal information about teacher</b>.</li> <li>• Accurately identifies high priority next areas for refinements in content, rigor, <b>and/or</b> pedagogical shifts for differentiated teacher groups <b>and targeted student groups</b>.</li> <li>• <b>Interprets</b> the impact of <b>the type of instructional support and the strategy for delivery (i.e. frequency, duration, and level of scaffolding)</b> on the progress of differentiated groups or individual teachers and makes adjustments to <b>the type of instructional support and strategies for delivery (i.e. frequency, duration, level of scaffolding)</b> to remove obstacles and improve student achievement.</li> </ul>
<b>3</b>	<ul style="list-style-type: none"> <li>• Analyzes student learning data and <b>patterns</b> of teacher progress, <b>teacher conceptions, and teacher misconceptions</b>.</li> <li>• <b>Accurately</b> identifies <b>high priority next areas</b> for refinement in content, rigor, <b>and/or</b> pedagogical shifts for differentiated groups.</li> <li>• <b>Interprets the impact of instructional support strategies on the progress of differentiated groups or assigned individual teachers and</b></li> <li>• <b>Makes adjustments to future instructional support to remove obstacles and improve student achievement.</b></li> </ul>
<b>2</b>	<ul style="list-style-type: none"> <li>• <b>Collects and analyzes teacher progress monitoring evidence of instructional effectiveness.</b></li> <li>• <b>Identifies needs for refinements in content, rigor, and/or pedagogical shifts for differentiated groups.</b></li> <li>• <b>Identifies relationships between professional development efforts and impact on student learning to adjust instructional support for teacher groups.</b> <ul style="list-style-type: none"> <li>○ <i>Planning, content or pedagogy training, application/practice in collaborative teams, observations, coaching, checking for understanding.</i></li> </ul> </li> </ul>
<b>1</b>	<ul style="list-style-type: none"> <li>• Maintains records of teacher progress and articulates the progress and potential obstacles of individual teachers.</li> <li>• Identifies refinements in pedagogical shifts for at least one teacher group.</li> <li>• Identifies areas of professional development support that need adjustment.</li> </ul>
<b>0</b>	

**Notes:**



“Instructional Support Plans” are documents that support the leadership team in monitoring the transfer of new learning to effective application. These documents support the assignment, monitoring and adjustments for coaching cycles, EGP progress, CIP goal completion, and real-time adjustments of support. There is alignment between the school’s CIP Goals, PD Plans (which are included in CIP Action Plans) and EGPs, and Instructional Support Plans. “Instructional Support Plans” are not mandated teacher improvement plans.

- **Share how the professional development plan was developed. How are professional development initiatives chosen for your building?**
- **Describe how data are collected on how often teachers implement strategies learned during professional development and whether they are using these strategies with fidelity.**
- **What evidence do you collect to show that the instructional strategies you are learning are making a difference in student achievement?**
- **What process is in place to modify the professional development plan based on teacher input or student learning data?**
- **How are teachers supported and held accountable for implementing what they are learning through professional development?**
- **How do you decide how to teach and support teachers with something and which strategy(ies) to use?**
- **How will the building continue to support the present professional development initiatives undertaken this year when \_\_\_\_\_, \_\_\_\_\_, or some other new initiative(s) might be brought to the building/district next year?**
- **How do you differentiate staff learning based on LOI and student achievement data?**
- **What impact have coaching plans had on meeting the needs of staff learning?**

## SECURING ACCOUNTABILITY RUBRIC

### *Accountability for Goals Element*

<b>4</b>	<ul style="list-style-type: none"><li>Utilizes an effective process to consistently monitor, review and revise horizontal <b>and vertical team</b> goals/action plans and/or CIP.</li></ul>
<b>3</b>	<ul style="list-style-type: none"><li>Utilizes an effective process to consistently monitor, review and revise <b>horizontal team goals/action plans</b> and/or CIP</li></ul>
<b>2</b>	<ul style="list-style-type: none"><li>Utilizes an <b>effective</b> process to <b>consistently monitor, review, and revise team goals or CIP in critical areas</b><ul style="list-style-type: none"><li><i>Track annual outcomes</i></li><li><i>Tracks monthly/weekly data against plan milestones to monitor, track, and review progress</i></li><li><i>Adjust strategies in order to reach goals</i></li></ul></li></ul>
<b>1</b>	<ul style="list-style-type: none"><li>Utilizes a process to monitor school or team goals.</li></ul>
<b>0</b>	

Notes:



Consider talking with the leader and/or reviewing documentation (next pages) in conjunction with the observation (e.g. consecutive leadership team minutes, coaching plans, and Collaborative Team Meeting minutes with revised goals or intervention plans).

In Leadership Team Meeting observations, you are looking for evidence of an effective, consistent process to monitor, review, and revise goals and plans. How might you use conversations with the leader and documentation to help you determine if the observed meeting evidence aligns with an effective and consistent process? You will use your observations, conversations rooted in documentation, and data to evaluate your evidence for a final “Accountability for Goals” score.

## SECURING ACCOUNTABILITY RUBRIC

### *Accountability for Goals Element*

#### *Documentation: CIP*

4	<ul style="list-style-type: none"><li>Utilizes an effective process to consistently monitor, review and revise horizontal <b>and vertical team</b> goals/action plans and/or CIP.</li></ul>
3	<ul style="list-style-type: none"><li>Utilizes an effective process to consistently monitor, review and revise <b>horizontal team goals/action plans</b> and/or CIP</li></ul>
2	<ul style="list-style-type: none"><li>Utilizes an <b>effective</b> process to <b>consistently monitor, review, and revise team goals or CIP in critical areas</b><ul style="list-style-type: none"><li>Track annual outcomes</li><li>Tracks monthly/weekly data against plan milestones to monitor, track, and review progress</li><li>Adjust strategies in order to reach goals</li></ul></li></ul>
1	<ul style="list-style-type: none"><li>Utilizes a process to monitor school or team goals.</li></ul>
0	

#### Notes:

- In what ways do you check that teachers are implementing the standards, benchmarks, and/or strategies that support your goal(s)?
- How do you know that what teachers are teaching builds on previous grades and prepares students for the next grade?
- What are the processes your school uses to coordinate the curriculum across and between grade levels?
- How do you determine requirements related to school goals and how do you follow up and check on progress?
- What structure do you use to collect walk-through trend data? How is trend data utilized to support, modify, or refine instructional practices?
- How do you use your leadership team to reach your goals?

## SECURING ACCOUNTABILITY RUBRIC

### *Accountability for Goals Element*

#### *Documentation: Student Achievement Data*

4	<ul style="list-style-type: none"><li>Exceeds school-wide performance goals for student achievement and for targeted sub-groups in core content areas.</li></ul>
3	<ul style="list-style-type: none"><li>Meets performance goals for student achievement in <b>targeted sub-groups in core content</b> areas.</li></ul>
2	<ul style="list-style-type: none"><li><b>Meets</b> performance goals for student achievement in <b>core content</b> areas.</li></ul>
1	<ul style="list-style-type: none"><li>Demonstrates measurable <b>student achievement gains</b> in <b>core content</b> goal areas.</li></ul>
0	

Notes:



Evaluators and school leaders need to have the same understanding of the performance goals and measures you will use to determine progress toward goals. For example, if you are discussing and scoring this element before you get state test results or growth from post-tests, what will you use near the end of the year? Are you focusing on the school's rigorous, measurable CIP goals and action plans from the beginning of the year even if these are adjusted throughout the year?



As you review student achievement data with the leaders, consider asking some questions about the relationships between what they monitor in teaching and what they monitor using data from various assessments.

- Describe how you see the relationship between what your teachers are teaching and state tests? And the benchmark assessments? The classroom-based/Common Formative Assessments?
- What actions have proven successful in helping your teachers change in instructional practices that result in student achievement gains?

## DEVELOPING THE ORGANIZATION RUBRIC

### *Change Process Element*

4	<ul style="list-style-type: none"> <li>• Uses knowledge of change theory to develop and apply specific strategies most likely to be effective in various situations to <b>proactively</b> support school staff in moving from agreement to commitment and</li> <li>• Engaging in <b>selective abandonment of practices</b> unaligned to research-based strategy or CIP and <b>adoption of new strategies</b>.</li> </ul>
3	<ul style="list-style-type: none"> <li>• Uses knowledge of change theory to develop and apply specific strategies <b>most likely to be effective in various situations</b> to support school staff in <b>moving from agreement to commitment</b> as they engage in changing classroom practice in alignment with school and district initiatives.</li> </ul>
2	<ul style="list-style-type: none"> <li>• <b>Uses knowledge of change theory to develop and apply specific strategies to</b> address resistance to change and</li> <li>• Support school staff as they engage in changing classroom practice in alignment with school and district initiatives.</li> </ul>
1	<ul style="list-style-type: none"> <li>• Uses tools and strategies to build agreement for change.</li> </ul>
0	

Notes:



Consider talking with the leader &/or reviewing documents to support **observation evidence** (e.g. CIP action plans for narrowed initiative, walk-through feedback, PD/support plans with differentiation to support movement from compliance to commitment).

- **What resistance have you or your team faced during this change?**
- **Are there specific practices you have focused on abandoning and how were they selected?**
- **How do you gauge that staff is committed to this change rather than doing it out of compliance?**
- **How did the staff respond to your last LdOI Survey regarding Change Process and have you made any shifts this year?**

## LEADING INSTRUCTION RUBRIC

### *Professional Development: New Learning Element*

<b>4</b>	<ul style="list-style-type: none"> <li>Ensures professional development has a specific, measurable, and ambitious objective that connects to a series of professional development cycles that leads to CIP goal(s).</li> <li>Ensure professional development is differentiated, <b>team-based, results-oriented</b>, and job-embedded with clear targets for teacher practice and student learning.</li> <li>Engages teachers in reflective interactions applying learning to previous and future instructional practice <b>within multiple contexts</b>.</li> <li>Maintains focus on narrowed initiatives <b>and adjust pacing of new PD objective cycles to allow sufficient time for teachers to build confidence and competence with current learning before advancing with new learning.</b></li> </ul>
<b>3</b>	<ul style="list-style-type: none"> <li><b>Ensures professional development has a specific, measurable, and ambitious objective that connects to a series of professional development cycles that leads to CIP goal(s).</b></li> <li>Ensures professional development is <b>differentiated</b> and job-embedded with clear targets for teacher practice and student learning.</li> <li>Engages teachers in <b>reflective interactions</b> applying learning to previous <b>and future</b> instructional practice.</li> <li>Maintains focus on narrowed initiatives to buffer staff from competing expectations for learning or implementation.</li> </ul>
<b>2</b>	<ul style="list-style-type: none"> <li>Delivers professional development that is aligned to CIP goals.</li> <li><b>Ensures professional development is job-embedded with clear targets for teacher practice and student learning.</b></li> <li><b>Engages teachers in applying learning to previous instructional practice.</b></li> </ul>
<b>1</b>	<ul style="list-style-type: none"> <li>Ensures professional development aligns to Continuous Improvement Plan (CIP) goals.</li> <li>Engages teachers in the professional learning.</li> </ul>
<b>0</b>	

Notes:



School leader and evaluator should know and be able to apply the characteristics of professional learning that leads to effective teaching practices and improved student results. Be certain that that leader and evaluator share an understanding of Adult Learning Theory.

# SITE VISIT

Leader: \_\_\_\_\_

Date: \_\_\_\_\_

BUILDING RELATIONSHIPS RUBRIC	
Accessibility Element	
4	<ul style="list-style-type: none"> <li>Structures daily opportunities for <b>purposeful</b>, planned contact and interactions with students, staff, and parents in classrooms and throughout the school, <b>and structures strategic opportunities for meaningful interactions with colleagues and district staff</b> <i>(as evidenced by interactions that reflect knowledge of an on-going progress of students and staff in meaningful conversations <b>sense of ease and expectation to interact with administrator, and administrative schedules</b>)</i></li> </ul>
3	<ul style="list-style-type: none"> <li><b>Structures daily</b> opportunities for <b>planned</b> contact and interactions with students, staff, and parents in classrooms and through the school <i>(as evidenced by interactions that reflect knowledge of an on-going progress of students and staff in meaningful conversations and administrative schedules).</i></li> </ul>
2	<ul style="list-style-type: none"> <li><b>Establishes</b> visibility through <b>regular opportunities for contact and interactions with students, staff, and parents in classrooms and throughout the school</b> <i>(as evidenced by interactions that reflect knowledge of students and staff in meaningful conversations and administrative schedules).</i></li> </ul>
1	<ul style="list-style-type: none"> <li>Is visible at various times throughout the school day.</li> </ul>
0	
<p>Notes:</p>	

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## BUILDING RELATIONSHIPS RUBRIC

### Accessibility Element

#### Documentation: Management Systems Artifacts

4	<ul style="list-style-type: none"><li>Structures daily opportunities for <b>purposeful</b>, planned contact and interactions with students, staff, and parents in classrooms and throughout the school, <b>and structures strategic opportunities for meaningful interactions with colleagues and district staff</b> (as evidenced by interactions that reflect knowledge of an on-going progress of students and staff in meaningful conversations <b>sense of ease and expectation to interact with administrator, and administrative schedules</b>)</li></ul>
3	<ul style="list-style-type: none"><li><b>Structures daily</b> opportunities for <b>planned</b> contact and interactions with students, staff, and parents in classrooms and through the school (as evidenced by interactions that reflect knowledge of an on-going progress of students and staff in meaningful conversations and administrative schedules).</li></ul>
2	<ul style="list-style-type: none"><li><b>Establishes</b> visibility through <b>regular opportunities for contact and interactions with students, staff, and parents in classrooms and throughout the school</b> (as evidenced by interactions that reflect knowledge of students and staff in meaningful conversations and administrative schedules).</li></ul>
1	<ul style="list-style-type: none"><li>Is visible at various times throughout the school day.</li></ul>

Notes:



Consider talking with the leader &/or reviewing documents to support **observation evidence** (e.g. Calendar of observations, walk-throughs, and duty; walk-through monitoring notes/feedback).

- **What evidence can you show me that ensures you are providing frequent and regular opportunities for interactions with students, staff and parents?**
- **Are there ways that district staff or leaders are involved on your campus?**
- **According to \_\_\_\_\_ survey taken by the teachers, \_\_\_\_\_% responded they \_\_\_\_\_ (e.g. are not getting feedback from walk-throughs). How might you explain this?**

## DEVELOPING THE ORGANIZATION RUBRIC

### *Management Systems Element*

<b>4</b>	<ul style="list-style-type: none"> <li>Engages staff in the analysis of system data at key intervals, to inform the development, maintenance, monitoring, and/or revision of effective and consistent systems and administrative routines for most operations to address real and potential challenges to safety, security, or teaching and learning.</li> </ul>
<b>3</b>	<ul style="list-style-type: none"> <li>Engages staff in the development, maintenance, and/or revision of effective and consistent systems and administrative routines for critical operations to support instructional priorities, emotional safety and physical safety of students and staff, and an efficient, orderly learning environment free of distractions or disruptions.</li> </ul>
<b>2</b>	<ul style="list-style-type: none"> <li>Implements effective and consistent systems and administrative routines for critical operations (e.g., discipline, communication, schedules, attendance) to support instructional priorities, emotional safety and physical safety of students and staff, and an efficient, orderly learning environment free of distractions or disruptions.</li> </ul>
<b>1</b>	<ul style="list-style-type: none"> <li>Manages the organization and operation for a clean, safe, orderly, learning environment in compliance with city codes, board policy, state statute, district standard operating procedures, and site procedures.</li> </ul>
<b>0</b>	

Notes:



Evaluators may ask leaders to focus on specific systems related directly to the leader’s role or school or district initiatives [e.g., Positive Behavior Intervention Support (PBIS), school safety, Move On When Reading (MOWR), Multi-Tier Systems of Supports (MTSS)]. Remember to determine this before the process begins and to be consistent across evaluatees.

- What are some of the systems you put in place in order to maintain a clean, safe, orderly learning environment?
- How do staff engage in the development, maintenance, and monitoring of this system?
- Are there systems you want to put in place to address challenges to safety, security, or teaching and learning? Have you identified key staff in this initiative?

## DEVELOPING THE ORGANIZATION RUBRIC

### Management Systems Element

#### Documentation: Management Systems Artifacts

4	<ul style="list-style-type: none"> <li>Engages staff in the <b>analysis of system data at key intervals, to inform the</b> development, maintenance, <b>monitoring</b>, and/or revision of effective and consistent systems and administrative routines <b>for most</b> operations to address real <b>and potential challenges</b> to safety, security, or teaching and learning.</li> </ul>
3	<ul style="list-style-type: none"> <li><b>Engages staff in the development, maintenance, and/or revision of</b> effective and consistent systems and administrative routines for critical operations to support instructional priorities, emotional safety and physical safety of students and staff, and an efficient, orderly learning environment free of distractions or disruptions.</li> </ul>
2	<ul style="list-style-type: none"> <li>Implements <b>effective and consistent systems and administrative routines for critical operations</b> (<i>e.g., discipline, communication, schedules, attendance</i>) to <b>support instructional priorities, emotional safety and physical safety of students and staff, and an efficient, orderly learning environment free of distractions or disruptions.</b></li> </ul>
1	<ul style="list-style-type: none"> <li>Manages the organization and operation for a clean, safe, orderly, learning environment in compliance with city codes, board policy, state statute, district standard operating procedures, and site procedures.</li> </ul>
0	

Notes:



Evaluators may ask leaders to focus on specific systems related directly to the leader’s role or school or district initiatives [e.g., Positive Behavior Intervention Support (PBIS), school safety, Move On When Reading (MOWR), Multi-Tier Systems of Supports (MTSS)]. Remember to determine this before the process begins and to be consistent across evaluatees.

- **What documentation do you have that shows how you engage staff in the development, maintenance, and monitoring of this system?**
- **Are there systems you want to put in place to address challenges to safety, security, or teaching and learning? Have you identified key staff in this initiative?**

## LEADING INSTRUCTION RUBRIC

### *Collaborative Learning Structures Element*

<b>4</b>	<ul style="list-style-type: none"> <li>• Creates and successfully implements multiple flexible structures for professional learning and <b>weekly</b> collaboration to meet vertical, horizontal, and/or integrated team-specific learning/achievement goals <b>with protocols to support team SMART goal development, action plan implementation</b> (<i>including</i> <ul style="list-style-type: none"> <li>○ <i>reflection on prior instruction or assessment strategies,</i></li> <li>○ <i>lesson or unit planning,</i></li> <li>○ <i>examination of student work,</i></li> <li>○ <i>analysis of disaggregated data,</i></li> <li>○ <i>modification of materials to address gaps,</i></li> <li>○ <i>and/or assessment development</i>) <b>and</b></li> </ul> </li> <li>• <b>Reflection of group processes.</b></li> </ul>
<b>3</b>	<ul style="list-style-type: none"> <li>• Creates <b>and supports</b> the utilization of multiple <b>flexible</b> grouping structures for scaffolding professional learning, and</li> <li>• Ensures teams collaborate (<b>at least twice monthly</b>) to meet team-specific student learning/achievement goals and individual teacher needs for content, <b>planning, analysis of data, assessment development</b> and/or rubric element instructional strategies.</li> </ul>
<b>2</b>	<ul style="list-style-type: none"> <li>• <b>Utilizes multiple structures for scaffolding professional learning, and</b></li> <li>• <b>Ensures</b> (<i>via agenda/notes collection, visitations, verbal feedback to teams, etc.</i>) <b>teams collaborate</b> to meet team-specific (<i>school, grade level, or vertical content</i>) student learning/achievement goals <b>and individual teacher needs for content or rubric elements.</b></li> </ul>
<b>1</b>	<ul style="list-style-type: none"> <li>• Provides structures (<i>e.g., collaborative learning team common planning time, or grade level/subject area meeting</i>) for the purpose of meeting team specific student learning/achievement goals.</li> </ul>
<b>0</b>	

**Notes:**

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Consider talking with the leader &/or reviewing documents to support **observation evidence** (e.g. Minutes of CTMs from various teams, Professional Development Plan, vertical and horizontal CTM calendar).

- How do you support the work that is occurring in CTMs?
- When do you have horizontal and vertical CTM meetings?
- How do you monitor and support the CTMs that you do not attend?
- Are there specific protocols or structures that you want to be in place in all of your CTMs?
- Which CTMs on your campus are meeting their goals and what is in place for those CTMs who are not meeting their goals?
- How does this CTM differ from the other CTMs on your campus?
- Share how you know that the assessments at the district, building, and classroom level are aligned with the standards and grade-level expectations (benchmarks).
- Describe how you and your colleagues use assessment data to plan and determine the impact of instruction.
- Describe how the staff uses collaboration as a part of the professional development process.

**LEADING INSTRUCTION RUBRIC**

*Collaborative Learning Structures Element*  
*Documentation: Management System Artifacts*

<b>4</b>	<ul style="list-style-type: none"> <li>• Creates and successfully implements multiple flexible structures for professional learning and <b>weekly</b> collaboration to meet vertical, horizontal, and/or integrated team-specific learning/achievement goals <b>with protocols to support team SMART goal development, action plan implementation</b> (<i>including</i> <ul style="list-style-type: none"> <li>○ <i>reflection on prior instruction or assessment strategies,</i></li> <li>○ <i>lesson or unit planning,</i></li> <li>○ <i>examination of student work,</i></li> <li>○ <i>analysis of disaggregated data,</i></li> <li>○ <i>modification of materials to address gaps,</i></li> <li>○ <i>and/or assessment development</i>) <b>and</b></li> </ul> </li> <li>• <b>Reflection of group processes.</b></li> </ul>
<b>3</b>	<ul style="list-style-type: none"> <li>• Creates <b>and supports</b> the utilization of multiple <b>flexible</b> grouping structures for scaffolding professional learning, and</li> <li>• Ensures teams collaborate (<b>at least twice monthly</b>) to meet team-specific student learning/achievement goals and individual teacher needs for content, <b>planning, analysis of data, assessment development</b> and/or rubric element instructional strategies.</li> </ul>
<b>2</b>	<ul style="list-style-type: none"> <li>• <b>Utilizes multiple structures for scaffolding professional learning, and</b></li> <li>• <b>Ensures</b> (<i>via agenda/notes collection, visitations, verbal feedback to teams, etc.</i>) <b>teams collaborate</b> to meet team-specific (<i>school, grade level, or vertical content</i>) student learning/achievement goals <b>and individual teacher needs for content or rubric elements.</b></li> </ul>
<b>1</b>	<ul style="list-style-type: none"> <li>• Provides structures (<i>e.g., collaborative learning team common planning time, or grade level/subject area meeting</i>) for the purpose of meeting team specific student learning/achievement goals.</li> </ul>
<b>0</b>	

**Notes:**

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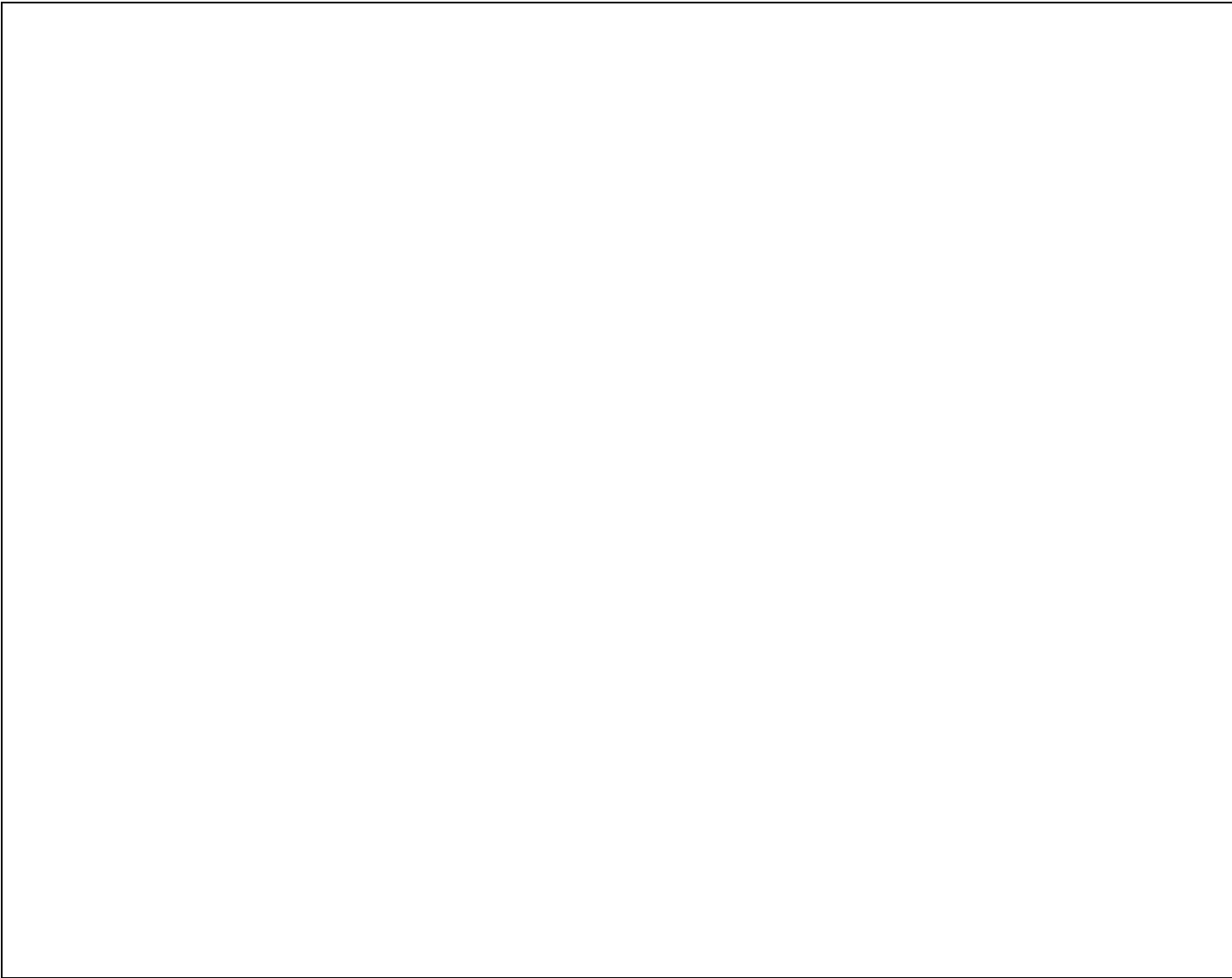
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Consider talking with the leader &/or reviewing documents to support **observation evidence** (e.g. Minutes of CTMs from various teams, Professional Development Plan, vertical and horizontal CTM calendar).

- How do you support the work that is occurring in CTMs?
- When do you have horizontal and vertical CTM meetings?
- How do you monitor and support the CTMs that you do not attend?
- Are there specific protocols or structures that you want to be in place in all of your CTMs?
- How does this CTM differ from the other CTMs on your campus?
- Which CTMs on your campus are meeting their goals and what is in place for those CTMs who are not meeting their goals?
- Share how you know that the assessments at the district, building, and classroom level are aligned with the standards and grade-level expectations (benchmarks).
- Describe how you and your colleagues use assessment data to plan and determine the impact of instruction.
- Describe how the staff uses collaboration as a part of the professional development process.

## SECURING ACCOUNTABILITY RUBRIC

### *Supervision of Written, Taught & Tested Curriculum Element*

4	<ul style="list-style-type: none"><li>Monitors teaching to assess alignment <b>and team-specific</b> gaps between written, taught, tested curriculum and student achievement results;</li><li>Summarizes implementation of <b>more than</b> one content vertical progression.</li></ul>
3	<ul style="list-style-type: none"><li>Monitors teaching to assess alignment <b>and gaps between written, taught, and tested curriculum and student achievement results;</b></li><li><b>Summarizes implementation of at least one content vertical progression.</b></li></ul>
2	<ul style="list-style-type: none"><li>Monitors teaching <b>alignment</b> to the standards <b>in all subjects</b> through teacher evaluation process, classroom visits, and supervision of collaborative team meetings.</li></ul>
1	<ul style="list-style-type: none"><li>Monitors teaching of the standards in core subjects (or assigned core subject for assistant principal) through teacher evaluation process, classroom visitations, and supervision of collaborative team meetings.</li></ul>
0	

Notes:

- How do you know that what teachers are teaching builds on previous grades and prepares students for the next grade?
- What are the processes your school uses to coordinate the curriculum across and between grade levels?
- How do you determine requirements related to school goals and how do you follow up and check on progress?



## SECURING ACCOUNTABILITY RUBRIC

### *Supervision of Written, Taught & Tested Curriculum Element*

#### *Documentation: Teacher Observational Data or Artifacts*

4	<ul style="list-style-type: none"><li>Monitors teaching to assess alignment <b>and team-specific</b> gaps between written, taught, tested curriculum and student achievement results;</li><li>Summarizes implementation of <b>more than</b> one content vertical progression.</li></ul>
3	<ul style="list-style-type: none"><li>Monitors teaching to assess alignment <b>and gaps between written, taught, and tested curriculum and student achievement results;</b></li><li><b>Summarizes implementation of at least one content vertical progression.</b></li></ul>
2	<ul style="list-style-type: none"><li>Monitors teaching <b>alignment</b> to the standards <b>in all subjects</b> through teacher evaluation process, classroom visits, and supervision of collaborative team meetings.</li></ul>
1	<ul style="list-style-type: none"><li>Monitors teaching of the standards in core subjects (or assigned core subject for assistant principal) through teacher evaluation process, classroom visitations, and supervision of collaborative team meetings.</li></ul>
0	

Notes:

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## SECURING ACCOUNTABILITY RUBRIC

### *Implementation of Strategies Element*

4	<ul style="list-style-type: none"><li>Establishes academic priorities that are non-negotiable, and teachers demonstrate <b>implementation</b> of strategies to promote the academic priorities <b>throughout the school or assigned group of teachers.</b></li></ul>
3	<ul style="list-style-type: none"><li>Establishes academic priorities that are non-negotiable, <b>and teachers demonstrate support of strategies to promote the academic priorities.</b></li></ul>
2	<ul style="list-style-type: none"><li>Establishes academic priorities <b>that are non-negotiable.</b></li></ul>
1	<ul style="list-style-type: none"><li>Establishes academic priorities.</li></ul>
0	

Notes:



Evaluators and Leaders should discuss the leader's CIP goals and non-negotiables before conducting the walk-throughs or full site visit. As you walk the campus, what evidence do you see of the goals and non-negotiables?



The descriptors for the observation and documentation for this element are different. Consider both as you use your evidence to determine an "Implementation of Strategies" score.

- **What are your academic non-negotiables right now and how were these priorities established and shared?**
- **Tell me about how you are handling staff who are not meeting your non-negotiables?**
- **What structure do you use to collect walk-through trend data? How is trend data utilized to support, modify, or refine instructional practices?**

## SECURING ACCOUNTABILITY RUBRIC

### *Implementation of Strategies Element*

#### *Documentation: Management System Artifacts*

4	<ul style="list-style-type: none"><li>• Holds staff and teams accountable for implementing CIP aligned strategies and tracks effectiveness of implementation of strategies <b>by school and team based on teaching and student learning.</b></li></ul>
3	<ul style="list-style-type: none"><li>• Holds staff and teams accountable for implementing CIP aligned strategies <b>and tracks effectiveness of implementation of strategies school-wide.</b></li></ul>
2	<ul style="list-style-type: none"><li>• Holds staff and teams accountable for implementing <b>strategies that align teaching and learning with CIP.</b></li></ul>
1	<ul style="list-style-type: none"><li>• Communicates expectation for implementing strategies that align to CIP.</li></ul>
0	

Notes:

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# INSTRUCTIONAL CONFERENCE:

Leader: \_\_\_\_\_

Date: \_\_\_\_\_

## LEADING INSTRUCTION RUBRIC

### *Observation & Evaluation of Instruction: Scripting Element*

4	<ul style="list-style-type: none"> <li>• Accurately scripts teacher and student statements</li> <li>• <b>Analyzes instruction, and</b></li> <li>• <b>Labels script for specific instructional feedback examples in conference</b> and evidence of observations and evaluation ratings.</li> </ul>
3	<ul style="list-style-type: none"> <li>• Accurately scripts teacher and student statement <b>in a comprehensive</b> manner to provide evidence of observations and evaluation ratings (e.g.):               <ul style="list-style-type: none"> <li>○ <i>Time intervals</i></li> <li>○ <i>Learner engagement data</i></li> <li>○ <i>Teacher movement patterns</i></li> </ul> </li> </ul>
2	<ul style="list-style-type: none"> <li>• <b>Accurately</b> scripts teacher and student statements to provide evidence of observations and evaluation ratings.</li> </ul>
1	<ul style="list-style-type: none"> <li>• Scripts teacher and student statements to provide evidence of observations and evaluation ratings.</li> </ul>
0	

Notes:

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## LEADING INSTRUCTION RUBRIC

### *Observation & Evaluation of Instruction: Scripting Element*

#### *Documentation: Teacher/School Observational Data or Artifacts*

<b>4</b>	<ul style="list-style-type: none"><li>• Accurately scripts teacher and student statements</li><li>• <b>Analyzes instruction, and</b></li><li>• <b>Labels script for specific instructional feedback examples in conference</b> and evidence of observations and evaluation ratings.</li></ul>
<b>3</b>	<ul style="list-style-type: none"><li>• Accurately scripts teacher and student statement <b>in a comprehensive</b> manner to provide evidence of observations and evaluation ratings (e.g.):<ul style="list-style-type: none"><li>○ <i>Time intervals</i></li><li>○ <i>Learner engagement data</i></li><li>○ <i>Teacher movement patterns</i></li></ul></li></ul>
<b>2</b>	<ul style="list-style-type: none"><li>• <b>Accurately</b> scripts teacher and student statements to provide evidence of observations and evaluation ratings.</li></ul>
<b>1</b>	<ul style="list-style-type: none"><li>• Scripts teacher and student statements to provide evidence of observations and evaluation ratings.</li></ul>
<b>0</b>	

Notes:

- How does your script support you during scoring and during the post-conference?
- How do you narrow down what evidence from the script you will use in the post-conference?

## LEADING INSTRUCTION RUBRIC

### *Pre & Post Conference: Data Gathering Element*

<b>4</b>	<ul style="list-style-type: none"> <li>Focuses conference on objectives derived from accurate analysis of instruction, content rigor, student misconceptions, and <b>knowledge of teacher as a learner</b>.</li> <li><b>Teacher self reflects</b> on lesson assessment data (<i>for whole group, subgroup, and individuals</i>) and teacher plans or actions to <b>make conjectures</b> about the relationship between teaching and student learning.</li> <li><b>Uses teacher conjectures</b> to adjust or transition with <b>efficient, appropriate, and focused</b> follow-up questions; and</li> <li>Ascertains teacher knowledge of elements, attributes, and <b>when and how to use elements effectively</b>.</li> </ul>
<b>3</b>	<ul style="list-style-type: none"> <li>Focuses conference on objectives derived from accurate analysis of instruction, <b>content rigor, and student misconceptions</b>.</li> <li><b>Guides</b> teacher reflection on lesson assessment data (<i>for whole group and sub-groups</i>) and teacher plans or actions <b>to analyze the cause and effect relationship between teaching and student learning</b>.</li> <li><b>Uses teacher responses to adjust or transition with follow-up questions and ascertains teacher knowledge of element and attributes</b>.</li> </ul>
<b>2</b>	<ul style="list-style-type: none"> <li>Focuses conference on objectives <b>derived from accurate analysis of instruction</b>.</li> <li>Engages teacher reflection on (<i>whole group and sub-group</i>) lesson assessment data and teacher plans or actions.</li> <li>Asks initial questions and <b>follow-up</b> questions aligned to conference objectives <b>to probe deeper</b>.</li> </ul>
<b>1</b>	<ul style="list-style-type: none"> <li>Conducts teacher conference to focus on conference objectives.</li> <li>Engages teacher reflection on whole group lesson assessment data and teacher plans (<i>pre-conference</i>) or actions (<i>post-conference</i>).</li> <li>Asks questions aligned to conference objectives.</li> </ul>
<b>0</b>	

Notes:

- How do you determine when to clarify, when to probe, and when to determine your scores in your pre and post-conferences?
- For the elements you discussed, how do you determine if the teacher understands the elements' purpose, attributes/steps, and when and how to effectively use a strategy?

## LEADING INSTRUCTION RUBRIC

### *Post Conference: Reinforcement & Refinement Element*

4	<ul style="list-style-type: none"> <li>• <b>Teacher converses with evaluator and demonstrates exploration of the content discipline and deep, nuanced knowledge of high-leverage strategies</b> integral to the cause/effect relationship between teaching and learning (<i>for whole group, sub-groups, and individual needs of students and the needs or interests of the teacher</i>).</li> <li>• <b>Teacher demonstrates understanding</b> of conference objective rubric element(s) and their purpose, attributes/steps, and insight about when and how to effectively use the <b>strategy in multiple instructional contexts</b> (<i>i.e. content concepts or groupings</i>).</li> </ul>
3	<ul style="list-style-type: none"> <li>• <b>Builds on teacher comments to transition to reinforcement and refinement and provide meaning for feedback</b> focusing on rubric elements integral to the cause/effect relationship between teaching and learning (<i>for whole group and sub-groups</i>), based on evidence from script and student learning artifacts.</li> <li>• Shares strategy aligned to conference objective rubric element(s), and teacher demonstrates understanding of purpose, attributes/steps, and</li> <li>• When and how to use the strategy to previously taught lesson <b>and future lessons</b>.</li> </ul>
2	<ul style="list-style-type: none"> <li>• Provides <b>relevant feedback focusing on rubric elements integral to the cause/effect relationship between teaching and learning (for whole group)</b>, based on evidence from the script and student learning artifacts.</li> <li>• <b>Shares strategy aligned to conference objective rubric element(s) and teacher demonstrates understanding of purpose, attributes/steps, and</b></li> <li>• <b>When and how to use the strategy to previously taught lesson.</b></li> </ul>
1	<ul style="list-style-type: none"> <li>• Provides practical and specific feedback based on direct quotes from instruction and examples of student learning.</li> <li>• Teacher leader checks for understanding, and teacher restates element and attributes/steps.</li> </ul>
0	

Notes:

- How do you follow up with teachers to check on their progress with their refinement?
- What strategies do you use to get your teachers to make connections between their teacher actions and student learning at the subgroup and individual level?

**BUSINESS OR PARENT TEAM MEETING:**

Leader: \_\_\_\_\_

Date: \_\_\_\_\_

**SETTING & COMMUNICATING DIRECTION RUBRIC**

*School Resource Management Element*

<b>4</b>	<ul style="list-style-type: none"> <li><b>Extends</b> the resources of school, family members, and community; and actively <b>maximizes</b> mutually beneficial relationships with business, religious, political, higher education, and/or service organizations <b>to add programs, services, extra-curricular activities, and/or staff outreach to meet student and staff needs.</b></li> </ul>
<b>3</b>	<ul style="list-style-type: none"> <li>Coordinates the resources of school, family members, and community; <b>and actively builds mutually beneficial relationships with business, religious, political, higher education, and/or service organizations to support current programming and resources for emerging student needs.</b></li> </ul>
<b>2</b>	<ul style="list-style-type: none"> <li>Coordinates the resources of <b>school, family members, and community</b> stakeholders to <b>support and sustain programming for learning and/or wrap-around social services</b> (<i>e.g., interns, mentors, in-kind donations, grants, non-profit partnerships</i>).</li> </ul>
<b>1</b>	<ul style="list-style-type: none"> <li>Identifies the resources and stakeholders within the community and school to positively affect student and adult learning.</li> </ul>
<b>0</b>	

Notes:

BUSINESS OR PARENT TEAM MEETING



## SETTING & COMMUNICATING DIRECTION RUBRIC

### *School Resource Management Element*

#### *Documentation: CIP Plans*

4	<ul style="list-style-type: none"><li>Collaborates with key staff to establish and implement a process for allocating appropriate fiscal resources, evaluate effectiveness of fiscal <b>and other resource allocation</b> (<i>time, schedule, technology, staff, funding</i>), <b>and reallocate resources to meet or exceed student achievement goals.</b></li></ul>
3	<ul style="list-style-type: none"><li>Collaborates with key staff to establish and implement a process for allocating appropriate fiscal resources <b>and evaluate effectiveness of fiscal resource use relative to the attainment of school goals and improvement of student achievement.</b></li></ul>
2	<ul style="list-style-type: none"><li><b>Collaborates with key staff to establish and implement a process</b> for allocating appropriate fiscal resources to support the school goals and improve student achievement.</li></ul>
1	<ul style="list-style-type: none"><li>Establishes a process to allocate appropriate fiscal resources that support the school goals and improve student achievement.</li></ul>
0	

Notes:

- I see that you have two types of leadership teams within your building, the \_\_\_\_\_ (e.g., Grade Level Site Council) and the \_\_\_\_\_ (e.g., Instructional Cabinet). Describe these teams and how they work within the building.
- Please show me your M&O, Tax Credit, and Title I budgets. Explain to me *how* you have decided to budget for various items and *why*?
  - What are some examples of others having a voice in this process?
  - Please explain to me how this resource allocation aligns to your CIP goals.
- How do resource allocations reflect school goals?
- What information (other than budgets) did you look at when making decisions about utilizing resources (i.e. instructional time, etc.)?
- How does the school determine the adequacy of resources provided to support student learning?
- Where do you see the biggest need for resources in your building?
- How are human, social, physical, and/or financial resources developed, managed, and allocated across your building?
- To what extent are resources equitably distributed throughout your school?

## BUILDING RELATIONSHIPS RUBRIC

### *Mutual Trust & Respect Element*

4	<ul style="list-style-type: none"><li>• Demonstrates active listening skills in interactions with stakeholders (e.g., students, parents, and staff). Promotes the appreciation of diverse perspectives and <b>displays empathy to support productive relationships that foster a shared vision.</b></li></ul>
3	<ul style="list-style-type: none"><li>• Demonstrates active listening skills in interactions with stakeholders (e.g., students, parents, and staff). Responds <b>appropriately to differing perspectives or values and displays concerns for the well-being of others.</b></li></ul>
2	<ul style="list-style-type: none"><li>• Demonstrates active listening skills in interactions with stakeholders (e.g., students, parents, and staff) and <b>responds appropriately to develop rapport.</b></li></ul>
1	<ul style="list-style-type: none"><li>• Listens to stakeholders (e.g., students, parents and staff) in a respectful way.</li></ul>
0	

Notes:

## DEVELOPING THE ORGANIZATION RUBRIC

### *Communication Systems Element*

4	<ul style="list-style-type: none"><li>• Develops and implements systems <b>that achieve</b> shared decision making with staff, families, and/or the community regarding <b>concerns, challenges, and potential obstacles to achieving CIP goals</b>; and</li><li>• Progress monitors for effective and consistent <b>two-way communication between teachers, students, and families</b> about student progress</li></ul>
3	<ul style="list-style-type: none"><li>• Develops and implements systems to increase <b>shared decision making</b> with staff, families, and/or the community regarding <b>shared purpose</b>, key school information, events/programming <b>challenges</b>, decisions, and school improvement; <b>and</b></li><li>• <b>Creates expectations for consistent communication from teachers to families about student progress.</b></li></ul>
2	<ul style="list-style-type: none"><li>• <b>Develops systems to promote two-way communication and participation with staff and/or families regarding key school information, events/programming decisions, and school improvement.</b></li></ul>
1	<ul style="list-style-type: none"><li>• Communicates key school information and events to staff on a regular basis and invites staff and parents to participate on committees for school improvement.</li></ul>
0	

Notes:



The descriptors for the observation, survey, and documentation (next page) for this element have some overlap but they are different. Consider them together as you use your evidence to determine a “Communication Systems” score.

**DEVELOPING THE ORGANIZATION RUBRIC**

**Communication Systems Element**

**Documentation: Management System Artifacts**

<b>4</b>	<ul style="list-style-type: none"> <li>• Develops and implements systems <b>that achieve</b> shared decision making with staff, families, and/or the community regarding <b>concerns, challenges, and potential obstacles to achieving CIP goals</b>; and</li> <li>• Progress monitors for effective and consistent <b>two-way communication between teachers, students, and families</b> about student progress</li> <li>• Implements a system to formally and informally acknowledge and celebrate individual and team academic successes <b>that includes rigorous and progressive benchmarks aligned to goals or vision</b> on a consistent basis.</li> </ul>
<b>3</b>	<ul style="list-style-type: none"> <li>• Develops and implements systems to increase shared decision making with staff, families, and/or the community regarding <b>shared purpose</b>, key school information, events/programming <b>challenges</b>, decisions, and school improvement; <b>and</b></li> <li>• <b>Creates expectations for consistent communication from teachers to families about student progress.</b></li> <li>• <b>Implements a system</b> to formally and informally acknowledge and celebrate individual and team <b>academic successes on a consistent basis.</b></li> </ul>
<b>2</b>	<ul style="list-style-type: none"> <li>• <b>Develops systems to promote two-way communication and participation with staff and/or families regarding key school information, events/programming decisions, and school improvement.</b></li> <li>• Celebrates individual and team accomplishments on a <b>formal and</b> informal basis.</li> </ul>
<b>1</b>	<ul style="list-style-type: none"> <li>• Communicates key school information and events to staff on a regular basis and invites staff and parents to participate on committees for school improvement.</li> <li>• Celebrates individual and team accomplishments on an informal basis.</li> </ul>
<b>0</b>	

Notes:

- How are parents and the community involved in the building?
- How are parents & community members involved in decision making or school improvement planning within the building/district?
- How effective is the newsletter (or other form of communication) in communicating with parents?
- Describe how grade-level expectations are shared with parents and students.
- How do you celebrate accomplishments?

## SETTING & COMMUNICATING DIRECTION RUBRIC

### *CIP Goal Setting Element*

#### *Documentation: CIP Plans*

4	<ul style="list-style-type: none"> <li>Sets or adjusts district-aligned, rigorous, measurable, CIP goals, based on <b>analysis of recent and longitudinal measures</b> of teacher evaluation and student achievement data/evidence, and root cause analysis.</li> <li>Ensures <b>measurable indicators for significant and achievable growth for all students</b>, with targeted goals to close student achievement gaps, for prioritized student sub-groups and <b>grade-level/course cohorts</b> are in place.</li> </ul>
3	<ul style="list-style-type: none"> <li>Sets or adjusts rigorous, measurable, CIP goals, based on analysis of <b>multiple sources</b> of teacher evaluation and student achievement data/evidence and <b>root cause analysis</b>.</li> <li>Ensures <b>targeted goal(s) to close student achievement gaps for prioritized student sub-groups</b> (e.g., 3<sup>rd</sup> grade ELL; 10<sup>th</sup> grade special education) <b>are in place</b>.</li> </ul>
2	<ul style="list-style-type: none"> <li>Sets or adjusts <b>rigorous, measurable</b>, district-aligned goals <b>for the CIP based on analysis of strengths and weaknesses in teacher evaluation and student achievement data and potential cause/effect relationships</b>.</li> </ul>
1	<ul style="list-style-type: none"> <li>Sets attainable district-aligned student achievement goals.</li> </ul>
0	

Notes:

- Please describe the process you used for planning for this school year. Specifically, please show me what documentation/data (both for students and teachers) you used when engaging in the planning process.
  - How did you ensure that your goals for teacher and student growth are rigorous and measurable?
  - How are student learning data used in designing professional development and assessing its impact?
  - What specific teacher and student sub-groups have you chosen to target for improvement and why?
  
- What adjustments have been made to your plan as a result of recent data and analysis?

## SETTING & COMMUNICATING DIRECTION RUBRIC

### CIP Action Plans Element

#### Documentation: CIP Plans

<b>4</b>	<p>Works with the staff to write CIP-action plans that include the following:</p> <ul style="list-style-type: none"> <li>• Sequenced, task-analyzed objectives that identify milestones toward the CIP goal.</li> <li>• <b>Differentiated</b> year-long PD plans with systematic monitoring and coaching.</li> <li>• <b>Targeted student intervention systems for identified sub-populations</b> (<i>differentiated plans /materials, data analysis, remediation/intervention delivery, progress monitoring, communication</i>).</li> </ul>
<b>3</b>	<p>Works with the staff to write CIP action plans that include the following:</p> <ul style="list-style-type: none"> <li>• <b>Sequenced</b>, task-analyzed objectives that identify milestones toward the CIP <b>for year-long PD and student intervention activities</b>.</li> <li>• Action steps and timelines for achieving objectives.</li> <li>• Identified budget funds, resources, and responsible person(s) aligned to each objective.</li> </ul>
<b>2</b>	<p><b>Works with the staff</b> to write CIP action plans that include the following:</p> <ul style="list-style-type: none"> <li>• <b>Task-analyzed</b> objectives <b>that identify milestones toward the CIP goal</b>.</li> <li>• Action steps and <b>timelines</b> for achieving objectives.</li> <li>• Identified <b>budget funds, resources, and responsible person(s) aligned to each objective</b>.</li> </ul>
<b>1</b>	<p>Writes CIP action plan that includes the following:</p> <ul style="list-style-type: none"> <li>• Objectives aligned to CIP goal(s).</li> <li>• Action steps for each objective in CIP.</li> <li>• Source-of funding for identified objectives.</li> </ul>
<b>0</b>	
<p><b>Notes:</b></p>	

- For your main CIP goal, please share your 1) sequenced, task analyzed objectives 2) differentiated year-long PD with systematic monitoring, and 3) targeted student intervention systems for identified student sub-populations.
- How were these action plans developed? How did you break down long-range goals in to short-term action steps?
- What role do members of your leadership team have in developing and then implementing the Strategies and Action Steps outlined in the CIP?
- How do you measure the impact of an intervention on student progress?
- What do you do if the student and/or teacher intervention isn't working?

## LEADING INSTRUCTION RUBRIC

### *Observation & Evaluation of Instruction: Scoring Accuracy Element* *Documentation: Teacher/School Observational Data or Artifacts*

<b>4</b>	<ul style="list-style-type: none"><li>• <b>Systematically</b> uses own LOI CET, CEA, teacher evaluation, and walk-through data, co-observation feedback, to identify areas for own professional learning</li><li>• Collaborates with colleagues to increase inter-rater agreement</li><li>• <b>Improves fair and consistent scoring practices across content areas and evaluators.</b></li></ul>
<b>3</b>	<ul style="list-style-type: none"><li>• Uses own LOI CET, CEA, <b>teacher evaluation, and walk-through data</b>, along with co-observation feedback, to identify areas for own professional learning.</li><li>• <b>Participates in opportunities to collaborate with colleagues to increase inter-rater agreement</b> and scoring accuracy.</li></ul>
<b>2</b>	<ul style="list-style-type: none"><li>• Uses own LOI CEA and CET data, along with co-observation feedback, to identify areas for own professional learning.</li><li>• <b>Participates in aligned professional development</b> to increase scoring accuracy.</li></ul>
<b>1</b>	<ul style="list-style-type: none"><li>• Uses own LOI CEA and CET data, along with co-observation feedback, to identify areas for own professional learning to increase scoring accuracy.</li></ul>
<b>0</b>	

Notes:

- How has your Continuing Evaluator Training (CET) changed or impacted your practice this year?
- Where do you think there are still concerns with accurate scoring?
- What areas of the LOI rubric or conference process is your leadership team working for greater inter-rater agreement and how have you addressed variability in scoring?
- Are there content areas, elements, or instructional conferencing skills where you or your leadership team need more support? How might collaboration among evaluators support you in this?
- What evidence do you have to show increased inter-rater agreement or accuracy based on your work?

## SECURING ACCOUNTABILITY RUBRIC

### *Educator Goal Plans Element*

#### *Documentation: Educator Goal Plans*

<b>4</b>	<ul style="list-style-type: none"><li>• Develops and/or annually revises Educator Goal Plans in collaboration with teachers that include measurable goals that will have the greatest impact on student learning, aligned action steps, and sufficient support or resources for the teacher clearly identified within the plan and provided to <b>nearly all</b> teachers.</li><li>• Produces documentation that <b>90%</b> of teachers achieved their EGP goals.</li></ul>
<b>3</b>	<ul style="list-style-type: none"><li>• Develops and/or annually revises Educator Goal Plans in collaboration with teachers that include measurable goals <b>that will have the greatest impact on student learning</b>, aligned action steps, and <b>sufficient support or resources for the teacher clearly identified</b> within the plan <b>and provided to most teachers</b>.</li><li>• Produces documentation that <b>80%</b> of teachers achieved their EGP goals.</li></ul>
<b>2</b>	<ul style="list-style-type: none"><li>• Develops and/or annually revises Educator Goal <b>Plans in collaboration with teachers that include measurable goals and aligned actions steps</b> for all assigned teachers using <b>student achievement</b> and teacher observation data.</li><li>• Produces documentation that <b>70%</b> of teachers achieved their EGP goals.</li></ul>
<b>1</b>	<ul style="list-style-type: none"><li>• Develops and/or annually revises Educator Goal Plan for all teachers using refinement goal from assigned teachers' observation(s).</li><li>• Produces documentation that <b>less than 70%</b> of teachers achieved their EGP goals.</li></ul>
<b>0</b>	

Notes:



**Start of the Year**

- How did you determine your EGP goals with staff?
- How did you determine support for staff EGP goals?
- How are you measuring your EGP goals?
- How are you monitoring the support, feedback, and progress toward goals?
- Are there educators who do not to have an EGP this year? If so, what’s your rationale?

**Leader’s own EGP:**

- Based on your school’s achievement and growth data, in what content area do you most need to become the top instructional expert for your campus?
- If you were to really put a plan in place using an LdOI element, what would be the most impactful for your staff and students’ growth?
- What would support look like to you?

**End of the Year:**

- Walk through your documentation showing the percentage of teachers meeting their EGP goals.
- What percentage of teachers achieved their EGP goals this year?
- How did you use EGPs to help teachers make the connection between teacher behavior and student learning?
- Walk me through progress toward your own EGP goal of \_\_\_\_?

# SURVEYS

## NOTE ABOUT SURVEYS

Districts have found it beneficial to conduct parent, staff, and student surveys during the middle of the school year so that the results best reflect the current year with the current leader while there is still time to make adjustments. Other districts do a mid-year survey for feedback to the leaders and another end-of-year survey that is then used to inform the LdOI evidence. In order to meet this timeline, it is important to determine what surveys will be used and how the data will be interpreted.

LdOI Evaluators could ask themselves the following questions as they plan for the district use of surveys:

- **What surveys should we use?**
  - *Should we use surveys specifically aligned to LdOI elements and performance levels?*
  - *Should we use existing surveys and if so, which questions align with Accessibility, Mutual Trust & Respect, Change Process (Staff only), Communication, and Management Systems (Staff only)?*
  - *Are we requiring the same survey across the district?*
  - *If we have more than one leader at a campus on the LdOI, do we need different surveys for each leader for staff? Do we need different surveys for each leader for parents?*
- **How should we interpret the survey data (by role, based on initiatives, differences in grades, etc)?**

Some examples of how survey data may be interpreted include:

- Evaluators use survey data as part of a leader conference where the leader speaks to the results and their leadership practices.
- Evaluators independently interpret the results to allow for expected differences across the district (Elementary vs. Middle School results, initiatives, leaders who are pushing and getting expected backlash/leaders who are well-loved but not showing growth, etc.)
- Evaluators use the data consistently across the district with specific survey scores being converted into 0-4 LdOI scores.

It is recommended that these decisions are made and communicated at the beginning of the year so that evaluators and building-level administrators have the same understanding.





Whether you use the survey statements below or use other survey questions, consider talking with leaders about perception data that has been collected and what they have done to continuously improve perception data.

**Staff:**

*With respect to behavior and academics, my principal makes sure teachers are informed about student expectations and their progress along with any necessary next steps. In addition, my principal keeps teachers informed on the level of progress and achievement of school goals. This information is communicated in a variety of ways that ensures all stakeholders (parents, staff and students) receive the information.*

*My principal partners with parents to create a positive environment that welcomes and values parents in the school. Some activities might include business partnerships, volunteering, serving on committees, access to social service agencies and programs that support social as well as academic learning.*

**Parents:**

*I was informed about academic and behavior expectations for students. I am aware of my child’s progress and any next steps that may be needed. I also have received information about whether or not the school is meeting its goals. I know that this information is available in many ways including newsletters in English and Spanish, emails, the school’s website and/or automated phone calls.*

*I believe parents are welcome, valued and respected at my child’s school. I am greeted respectfully in the office, am aware of volunteer opportunities and have been invited to participate in committees, activities, or site decisions. I believe the leadership works with parents to find ways to involve families in the school.*

- Describe how school goals and grade-level expectations are shared with parents and students.
- How are parents and the community partners in education at your school?

## BUILDING RELATIONSHIPS RUBRIC

### *Mutual Trust & Respect Element*

#### *Survey: Parent, Staff, (Student)*

4	<ul style="list-style-type: none"><li>• Demonstrates active listening skills in interactions with stakeholders (e.g., students, parents, and staff).</li><li>• Promotes the appreciation of diverse perspectives and <b>displays empathy to support productive relationships that foster a shared vision.</b></li></ul>
3	<ul style="list-style-type: none"><li>• Demonstrates active listening skills in interactions with stakeholders (e.g., students, parents, and staff).</li><li>• Responds <b>appropriately to differing perspectives or values and displays concerns for the well-being of others.</b></li></ul>
2	<ul style="list-style-type: none"><li>• Demonstrates active listening skills in interactions with stakeholders (e.g., students, parents, and staff) and <b>responds appropriately to develop rapport.</b></li></ul>
1	<ul style="list-style-type: none"><li>• Listens to stakeholders (e.g., students, parents and staff) in a respectful way.</li></ul>
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Whether you use the survey that includes the questions below or use other survey questions, consider talking with leaders about perception data that has been collected and what they have done to continuously improve perception data.

*Staff:*

*When working to develop mutual trust and respect, my principal gives undivided attention to parents and/or staff and is an active listener. I believe the leadership promotes the appreciation of diverse perspectives and displays empathy to support productive relationships that foster a shared vision.*

*Parents:*

*I believe the leadership shows respect by making eye contact, giving their full attention. I believe the leadership responds appropriately to issues, concerns or questions from students and parents who may have differing perspectives or values and displays concerns for the well-being of others.*

- **What steps have you taken to build a culture of trust, mutual respect, empathy, and competence among teachers, students, parents, etc.?**
- **Describe the climate and culture among staff members and how this impacts student achievement.**
- **Describe the climate and culture between staff and students and parents, and how this impacts student achievement.**

## DEVELOPING THE ORGANIZATION RUBRIC

### *Change Process Element*

#### *Survey: Staff*

4	<ul style="list-style-type: none"><li>• Uses knowledge of change theory to develop and apply specific strategies most likely to be effective in various situations to <b>proactively</b> support school staff in moving from agreement to commitment and</li><li>• Engaging in <b>selective abandonment of practices</b> unaligned to research-based strategy or CIP and <b>adoption of new strategies</b>.</li></ul>
3	<ul style="list-style-type: none"><li>• Uses knowledge of change theory to develop and apply specific strategies <b>most likely to be effective in various situations</b> to support school staff in <b>moving from agreement to commitment</b> as they engage in changing classroom practice in alignment with school and district initiatives.</li></ul>
2	<ul style="list-style-type: none"><li>• <b>Uses knowledge of change theory to develop and apply specific strategies to</b> address resistance to change and</li><li>• Support school staff as they engage in changing classroom practice in alignment with school and district initiatives.</li></ul>
1	<ul style="list-style-type: none"><li>• Uses tools and strategies to build agreement for change.</li></ul>
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Whether you use the survey statement below or use other survey questions, consider talking with leaders about perception data that has been collected and what they have done to continuously improve perception data.

*Staff:*

*When considering a systemic change, my principal proactively supports staff in commitment to the new initiative. This may include developing an implementation plan, engaging in selective abandonment of practices unaligned to research or the school's Continuous Improvement Plan, and adoption of new strategies.*

- **How will the building continue to support the present professional development initiatives undertaken this year when \_\_\_\_\_, \_\_\_\_\_, or some other new initiative(s) might be brought to the building/district next year?**
- **How are teachers balancing expectations from \_\_\_\_\_ and expectations from the district's \_\_\_\_\_ initiative?**



**DEVELOPING THE ORGANIZATION RUBRIC**

***Communication Systems Element***  
***Survey: Parent & Staff***

4	<ul style="list-style-type: none"><li>• Develops and implements systems <b>that achieve</b> shared decision making with staff, families, and/or the community regarding <b>concerns, challenges, and potential obstacles to achieving CIP goals</b>; and</li><li>• Progress monitors for effective and consistent <b>two-way communication between teachers, students, and families</b> about student progress</li></ul>
3	<ul style="list-style-type: none"><li>• Develops <b>and implements</b> systems to <b>increase shared decision making</b> with staff, families, and/or the <b>community</b> regarding <b>shared purpose</b>, key school information, events/programming <b>challenges</b>, decisions, and school improvement; <b>and</b></li><li>• <b>Creates expectations for consistent communication from teachers to families about student progress.</b></li></ul>
2	<ul style="list-style-type: none"><li>• <b>Develops systems to promote two-way communication and participation with staff and/or families regarding key school information, events/programming decisions, and school improvement.</b></li></ul>
1	<ul style="list-style-type: none"><li>• Communicates key school information and events to staff on a regular basis and invites staff and parents to participate on committees for school improvement.</li></ul>
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Whether you use the survey statements below or use other survey questions, consider talking with leaders about perception data that has been collected and what they have done to continuously improve perception data.

*Staff:*

*My principal has established procedures that require two-way communication between teachers, students and families. This communication is helpful in receiving input on new systems that may benefit student achievement, encouraging shared decision making and providing successful opportunities to meet the school's academic goals.*

*Parents:*

*I was informed of the school's goals and any progress toward meeting them. I was also informed about how I can help the teachers, students and leadership achieve the goals.*

- **Do parents, students, and/or staff feel listened to and how do you know that?**
- **How do teachers communicate their concerns to the building leadership team?**
- **To what extent do e-mails and weekly bulletins provide adequate communication within the building?**
- **Describe the types of communications between/among you, the AP, the leadership team(s), and staff.**
- **Share how discussions/decisions are communicated between and among grade levels. Students? Parents?**

**DEVELOPING THE ORGANIZATION RUBRIC**

*Management Systems Element*  
*Survey: Staff*

<b>4</b>	<ul style="list-style-type: none"><li>Engages staff in the <b>analysis of system data at key intervals</b>, to inform the development, maintenance, <b>monitoring</b>, and/or revision of effective and consistent systems and administrative routines <b>for most</b> operations to address real and <b>potential challenges</b> to safety, security, or teaching and learning.</li></ul>
<b>3</b>	<ul style="list-style-type: none"><li><b>Engages staff in the development, maintenance, and/or revision of</b> effective and consistent systems and administrative routines for critical operations to support instructional priorities, emotional safety and physical safety of students and staff, and an efficient, orderly learning environment free of distractions or disruptions.</li></ul>
<b>2</b>	<ul style="list-style-type: none"><li>Implements <b>effective and consistent systems and administrative routines for critical operations</b> (<i>e.g., discipline, communication, schedules, attendance</i>) <b>to support instructional priorities, emotional safety and physical safety of students and staff, and an efficient, orderly learning environment free of distractions or disruptions.</b></li></ul>
<b>1</b>	<ul style="list-style-type: none"><li>Manages the organization and operation for a clean, safe, orderly, learning environment in compliance with city codes, board policy, state statute, district standard operating procedures, and site procedures.</li></ul>
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# Leading Observation Instrument Handbook

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