

Indicators of Excellence Evaluation Tool

Administrator Evaluation: Postings and Assurances

Non-State Approved Evaluation Tool—District Approved Evaluation Tool

Research Base

Partner Solutions' Indicators of Excellence Evaluation Tool for School Leaders is a blend of prominent research in both education and successful business. Partner Solutions believes that the major indicators of how successful a leader, and therefore a school, will be cannot ignore marketplace forces that influence the quality of employees and the longevity and productivity of those employees. Also, consumer desire, needs, and satisfaction all factor in the primary indicator of a leader and school success—student achievement as measured by college and career readiness. Partner Solutions' Indicators of Excellence Evaluation Tool encompasses all of this research and theory by identifying areas of evaluation that reflect key outcomes using value-added measures and by evaluating the efforts or inputs of the school leader to positively influence said outcomes.

At the heart of the tool are the *Correlates of Effective Schools*,¹ Lawrence Lezotte and Ronald Brown's landmark research that identified correlates (common qualities) of schools who had unusual success. That is, when considering the demographic qualities of schools, these performed significantly better than their comparative schools or districts. Lezotte and Brown's research identified, named, and described the practices in place in these schools that resulted in their above-average achievement. In turn, Partner Solutions uses these correlates to evaluate leaders on each of these qualities of successful schools.

Additionally, Robert Marzano's synthesis of research on *School Leadership that Works*² is equally important to the evaluation tool, and reflected in each of the Indicators, most notably is the expectation that leaders will develop and inspect instruction in their school to guarantee that it reflects rigor and high expectations through the use of "high yield" strategies in classrooms.

The Indicators of Excellence Evaluation Tool relies on data to document that leaders are annually improving across five key areas: student achievement; enrollment, retention, and attendance; rules and compliance; managing the budget; and innovation are unique data points for charter school leaders. In a sense, school leaders are CEOs of their organization because charter school leaders have control over their budgets, they are the people responsible for maintaining 100% compliance with their authorizers and the MDE, as well as the performance of the school staff. The Partner Solutions' tool uses the Walton Foundation's guide to constructing performance measures³, to inform the structure and format of the evaluation process as school leaders set goals within the Indicators.

Over many years of refining and growing as an education service provider in Michigan, Partner Solutions' embrace of school reform and choice as its mission has resulted in looking beyond just best practices in schools. The literature on that is deep, but the failure rate is alarmingly high. Because of this, and the fact that charter school leaders have a remarkably different role to play than a traditional public

³ Holley, M.J., Carr, M.J., King, M.H. (n.d.) *How to construct performance measures 2.0: A brief guide for education reform grant applicants to the Walton Family Foundation.* Available at: <u>http://www.waltonfamilyfoundation.org/~/media/documents/how-to-construct-performance-measures-education.pdf?la=en</u>

¹ Lezotte, L., McKee-Snyder, K. (2011) What effective schools do: Re-envisioning the correlates. Bloomington, IN: Solution Tree Press.

² Marzano, R.J., Waters, T., & McNulty, B. (2005). School leadership that works: From research to results. Alexandria, VA: Association for Supervision and Curriculum Development.

school leader, Partner Solutions looks to successful business, organizational, and leadership strategies to empower its leaders, and by extension their staff, to build positive, collaborative and dynamic school communities. For instance, the category of "Innovation" in the Indicators of Excellence Evaluation Tool is an opportunity for leaders to document their progress toward school reform and in becoming a successful, unique choice in their local community. Training for leaders in how to achieve this is provided through the study, analysis, and evaluation of Mark Murphy's work on hiring, evaluation, compensation, and work culture⁴; the study of motivation from Dan Pink⁵; and the importance of effective strategic planning from Simon Sinek.⁶

Embedded in all of the aspects of the Indicators of Excellence Evaluation Tool is current research on school reform from TNTP (formerly The New Teacher Project)⁷, the Walton Foundation's research on school success and leadership,⁸ and the Gates Foundation Measures of Effective Teaching⁹ multi-year research project that identifies the qualities of effective teaching as well as the organizational structures necessary in schools to promote teacher retention and student success. Research funded by the Education Trust¹⁰ also informed the Indicators of Excellence Evaluation Tool by providing clear distinctions between the beliefs and practices of the most successful leaders, particularly in high poverty schools, and less successful leaders across the country. Finally, research from New Leaders¹¹ on how great leaders develop teachers, manage talent, and provide a great place to work rounds out the research that informs each aspect of the Indicators of Excellence Evaluation Tool.

⁵ Pink, D. (2009) Drive: The surprising truth about what motivates us. New York, NY: Riverhead Books.

⁴ Murphy, M. (2012) *Hiring for attitude*. New York, NY: McGraw Hill.

⁶ Sinek, S. (2009) Start with why: How great leaders inspire everyone to take action. New York, NY: Penguin Books.

⁷ TNTP Publications: The Irreplaceables (2012); Greenhouse Schools (2012); The Mirage (2015); The Widget Effect (2009). Available at: http://tntp.org/publications

⁸ Leithwood, K., Louis, K. S., Anderson, S., & Wahlstrom, K. (2004). How leadership influences student learning. New York, NY: Wallace Foundation. Available at: http://www.wallacefoundation.org/knowledge-center/Documents/How-Leadership-Influences-Student-Learning.pdf

⁹ Archer, J., Cantrell, S., Holtzman, S., Joe., J., Tocci., C., Wood, J. (2016) Better feedback for better teaching: A practical guide to improving classroom observations. San Francisco, CA: Jossey Bass

¹⁰ Chenoweth, K., Theokas, C. (2011) *Getting it done: Leading academic success in unexpected schools.* Cambridge, MA: Harvard Education Press.

¹¹ Ikimoto, G., Taliaferro, L., Adams, E. (November 2012). *Playmakers: How great principals build and lead great teams of teachers.* Retrieved from: http://www.newleaders.org/newsreports/publications/playmakers/

Qualifications

The Indicators of Excellence Evaluation Tool is the result of the work of numerous educators with more than two decades of experience in the field as teachers, leaders, researchers, professional development leaders, and school designers.

Chuck Stockwell is the founder of Charyl Stockwell Academy, a high performing Michigan Public School Academy. With the help of former staff from the school, Chuck Stockwell also founded CS Partners/Partner Solutions and continues to serve as the company's senior advisor. CS Partners/Partner Solutions is an educational consulting and management company that works with over 30 public charter schools in Michigan. Mr. Stockwell began working in Michigan Public Charter Schools in 1995, and was a 2003 winner of the Michigan Association of Public School Academies Leadership award. In addition to his work in charter schools, Chuck has twenty-five years' experience in traditional public education as a teacher, central office administrator, community college trustee, elementary school principal, ISD program developer and consultant,. He also has experience in facilities development and construction, as well as school strategic planning including marketing and mission/vision development. He is an expert in early childhood development, elementary education, and special education.

Jim Perry earned his Bachelor of Arts in Psychology and Master of Arts in Education from the University of Michigan. He has over 18 years of experience in education with 12 years as a school leader. Jim is particularly interested in incorporating experiential education into the small high school model. Most recently, he led a development team in researching, planning, and ultimately successfully opening two innovative high schools that offer highly engaging project-based learning, online coursework, and flexible scheduling to offer non-traditional high school students a unique and personalized high school education. Jim specializes in strategic planning in a mission-driven organization, hiring, developing and rewarding successful professionals, and realizing the goals of school reform.

Laura Moellering earned both her bachelor's degree in Secondary Education in English and Psychology, and her master's degree in Curriculum and Instruction from Eastern Michigan University. Laura was a high school classroom teacher and school leader. Laura has written curriculum and education programs, and has trained leaders and teachers in how to make those a reality in their school.

Fred Borowski earned an associate degree at San Diego City College after serving as a Sergeant in the United States Marine Corps; he also earned a baccalaureate degree in education from Wayne State University, and received his master of education degree from Wayne State University in Detroit, Michigan. Fred has more than 34 years' experience in education in Michigan, serving as a teacher, private school principal, designer and leader of a lab school at Wayne State University, and leader of several new charter schools. Fred has deep knowledge of leadership, building effective leadership teams, and has presented at several national conferences.



Indicators of Excellence School Leader Evaluation



Evaluation Process

One of the duties Partner Solutions has to the Academy's Board of Directors and to the Michigan Department of Education is to "implement a process of evaluation for staff assigned to the Academy in compliance with all applicable law". Through the school leader, Partner Solutions is responsible "to select, evaluate, assign, discipline, and transfer personnel".

School leaders are the most important factor in the instructional success of their schools. We believe the most productive school leader evaluation is a structured and self-guided concurrent system built around a self-evaluation process. The process outlined below will continue throughout the year and the school leader will receive a rating of Highly Effective, Effective, Minimally Effective, or Ineffective. As required by the MDE, these ratings factor into retention, promotion, and termination decisions.

Timeline:

- October: The school leader will receive the self-evaluation forms from Partner Solutions.
- May: The Board will complete a survey, sent to them electronically by Partner Solutions.
- June 1st: The school leader will complete a self-evaluation and return it to Partner Solutions.
- June 30th: Partner Solutions will review the self-evaluation and feedback will be given to the school leader regarding the school leader's reflections, ratings, and goals. The final rating will be entered into the REP for the Michigan Department of Education.
- Throughout the year the leader should meet regularly with the identified evaluator(s) and discuss progress toward reaching any and all stated goals. In addition, this is a time for the leader to gather and document artifacts that support her/his self-reflection in each of the indicators for the evaluation. This regular meeting speaks to the self-reflective, collaborative nature of this evaluation tool and serves to establish a context conducive to continual improvement.

Future Goals:

Upon completion of this self-evaluation and rating the school leader will select 1-3 areas to focus on as their personal goals. The goals and measurements will be established as a part of the self-evaluation process and well as the feedback session with Partner Solutions. The response to those goals will be reviewed during the following year's self-evaluation process.

Rating Scale:

The Michigan Department of Education has developed the rating scale below that we must use.

* Ineffective (I) Numeric Value: 1

Performance is unacceptable and needs immediate improvement. Expected results are not attained and planned objectives are not being achieved. This rating also pertains to individuals who achieved results but did so in a manner that is clearly in violation of the competencies and values that are expected from the position.

*School administrators rated as ineffective must implement an improvement plan designed by the evaluator(s) designed to address and correct deficiencies noted in the evaluation. The improvement plan shall recommend professional development opportunities and other actions designed to improve the rating of the school administrator on her or his next annual evaluation, according to 380.1249b(1)(h).

**Leaders receiving a rating of "Ineffective" for three consecutive annual evaluations must be dismissed according to 380.1249b(1)(i) of the Revised School Code.

Minimally Effective (ME) Numeric Value: 2

Improvement is required as performance was varied, and the school leader's ability to meet expectations and accomplish planned objectives was inconsistent. This rating should be used for individuals who achieved results but did so by demonstrating behaviors that are not consistent with the position competencies and values.

*School administrators rated as minimally effective must implement an improvement plan designed by the evaluator(s) designed to address and correct deficiencies noted in the evaluation. The improvement plan shall recommend professional development opportunities and other actions designed to improve the rating of the school administrator on her or his next annual evaluation, according to 380.1249b(1)(h).

* Effective (E) Numeric Value: 3

Achieved results that consistently met or occasionally exceeded expectations and planned objectives. This rating describes a person who successfully does their job and meets high performance standards while at the same time demonstrating the school leader's competencies and values. (Note: This rating should also be used for individuals who are new to their position and who are progressing as expected.)

✤ <u>Highly Effective (HE)</u> Numeric Value: 4

Achieved results that far exceeded expectations and requirements of the job, while modeling the competencies expected of the school leader. Performance was always of exceptional quality. This rating is reserved for school leaders who exhibit exceptional performance while meeting challenging demands. If a leader receives a rating of "Highly Effective" for three consecutive annual evaluations the school district, intermediate school district, or public school academy may choose to conduct an evaluation biennially instead of annually, as stated in in 380.1249b(1)(j) of the Revised School Code.

Student Achievement (Weight: 25%)

Academic achievement of all students is the main success measure of a school. Part of the vision of an academy is how all stakeholders believe the teaching and learning process should proceed. The tests that measure academic achievement and the expected scores on those tests are all determined by that vision.

Highly Effective	Effective	Minimally Effective	<u>Ineffective</u>
I have a school where student growth and achievement are continuously improving. In addition to the work of an effective leader, I am particularly focused on sub-groups and making sure that all students, including special education (including gifted and talented), and economically disadvantaged students are all growing in equal measure. I engage staff in analyzing student data and in seeking solutions for weaknesses through the use of study groups, and monitoring the effects of efforts on student achievement. I conduct teacher performance evaluations utilizing the prescribed tool that provides clear evidence for the ranking of teachers and supports these rankings with tangible, non- subjective evidence pertinent to each and every one of the indicators for the evaluation. I meet all of the goals listed in the School Improvement Plan.	I have created a culture around student achievement that includes regular analysis of student data that goes beyond standardized assessments to include reflection on student success in unit plans. I have all staff involved in discussions of students learning and achievement and collectively owning the success of the school. In my school, teachers work with one another to share their successes and are provided with opportunities to lead upon showing success. I have a system in place to identify students at-risk of learning failure including an attendance monitoring plan that encourages consistent school attendance. I conduct teacher evaluations utilizing the prescribed tool and provide support for the teacher ranking that is based upon tangible evidence, entirely free of any subjective material and meets the minimum number of required observations I make progress toward achieving the goals listed in the School Improvement Plan.	I cannot sustain student growth over time and am reluctant to make significant decisions with regard to teacher effectiveness. I do not communicate a sense of urgency with regard to maximizing student learning and do not advise teachers on how to improve student learning. Data is used inconsistently in my school and teachers do not feel that they have control over student results or how they will be evaluated with regard to achievement. I conduct teacher evaluations utilizing the prescribed tool and generally provide support for the teacher ranking that is mostly based upon tangible evidence, but is not entirely free of any subjective material and meets the minimum number of required observations. I observe some progress toward achieving the goals listed in the School Improvement Plan.	I do not use data consistently with teachers and am poorly equipped to understand and use data to inform discussion. I do not make explicit connections between student achievement and attendance, the use of resources, classroom culture, or instructional methodology to provide teachers with the support needed to improve. Initiatives that are begun are quickly forgotten and teachers look at new efforts as just another new thing that will be discarded in a short time.
<u>Possible Evidences:</u> State assessment d	iata. Authorizer assessment data. Teacher	progress on Student Learning Objectives	. Stakenoider surveys. Attendance data.

Leader Reflection on Student Achievement:

Student Enrollment, Retention, and Attendance (Weight: 18.75%)

Retention of students year over year is dependent on parent and student satisfaction related to all aspects of the school but particularly student achievement and student connectedness to school and their classroom. Consistent retention of students allows the academy to have the necessary time to positively impact student achievement, personal success and continue to build a positive school climate and culture. A high percentage of student retention is essential to the success of the academy.

Highly Effective	Effective	Minimally Effective	<u>Ineffective</u>
I have built a culture around student	I have a procedure in place that has	I accept convenient excuses from	I retain less than 60% of students and
retention that recognizes that families	capable and responsible people	families instead of being reflective	do not accept responsibility for
that feel they are heard and valued	managing re-enrollment that results in	about the reasons families are leaving.	student mobility. I accept reasons
and whose children are well cared for	clear enrollment numbers by early	I design procedures for re-enrollment	like, "These families never make a
and learning will not leave their	spring. I run re-enrollment early and	and enrollment that do not respect	decision until September," or, "These
school unless their life circumstances	keep new families engaged up until	families or that communicate low	families never turn in their re-
change. I employ tools and processes	the start of school. I do not try to be	expectations to families and staff	enrollment forms," without trying to
that help all school staff understand	all things to all people, but instead	about how and why decisions are	establish the reasons behind those
their role in creating an environment	communicate the vision and mission	made about what school to attend. I	statements or beliefs and developing
where not only do students and	of the school so that students and	am reliant upon gimmicks like raffles	systems to improve.
families stay, but that there is a high	families appreciate and understand	and giveaways to lure families into	
community desire to attend my	the school. I foster a culture that	school and have not built a group of	
school. I meet the established	produces a 94% average daily	parents and students to spread the	
standard for annual student retention.	attendance rate.	word about their school. I observe an	
I have created a culture that produces		average daily attendance rate range of	
an average daily attendance rate		90% to 93%.	
greater than 94%.			
Possible Fyidences: Student retention data Daily average attendance. Identification of chronically absent students. Student counts from first day of school. Fall			

Possible Evidences: Student retention data, Daily average attendance, Identification of chronically absent students, Student counts from first day of school, Fall Count Day, and Spring Count Day, Student and family survey data

Leader Reflection on Student Enrollment and Retention:

Balanced Budget (Weight: 18.75%)

Academies will operate within a balanced budget each year. School leaders will be conservative in their estimate of enrollment and will make those decisions based on anticipated expenses, historical enrollment and retention information and projections for funding.

<u>Highly Effective</u>	Effective	Minimally Effective	<u>Ineffective</u>
I work with the Board of Directors to identify areas of need so that funds can be dedicated to meet them. I seek to solve problems through collaboration, consultation and analysis, ultimately doing what is best for students. I identify and implement research-based practices to operate as efficiently as possible while compensating individuals competitively and commensurate with the value they bring to the school. I understand how finances impact the overall operations of the Academy and bring stakeholders into budget conversations in a way that helps everyone understand budget limitations as well as opportunities.	I plan the budget in conjunction with the board of directors and the HR Manager and maintain Throughout the year, I maintain spending within categories. To be effective, I would work with the Board of Directors to identify the strategic use of funds to improve student learning in innovative and creative ways. I understands that spending and achievement do not necessarily correlate and continually seek to enhance my understanding of how finances impact the overall operations of the Academy .	I am reactive in financial matters and do not always make decisions based on student needs. I do not always give programs having financial impact time or support to work and often make financial decisions that are not thoroughly thought-out. I struggle in making the right decisions when budget revisions are required and may overspend certain budgeted items. I spend into fund balance and do not have a sustainable plan in place to prevent that from occurring again.	The ineffective leader does not adequately consult with their budget when committing to purchases or increases in salaries or staffing resulting in budget issues. The ineffective leader does not have adequate oversight over the approval of and use of POs or other purchasing system.

to 15%, Balanced budget at conclusion of the fiscal year, Salaried and hourly staff are paid at a competitive wage. Effective and appropriate use of all grant funds, annually.

Leader Reflection on Balanced Budget:

Rules and Compliance (Weight: 18.75%)

A successful academy is able to function within all the rules and regulations established by various stakeholders. School leaders will ensure that the Board of Directors has up-to-date policies and procedures that integrate all administrative requirements and current staff, student and family handbooks. The expectation is that leaders and staff will follow all of the policies and procedures continuously and consistently.

Highly Effective	Effective	Minimally Effective	Ineffective
I avail myself to all of the resources available outside of and within their school to complete all compliance requirements in a timely fashion. I use compliance activities to continuously reflect on and improve academy operations. I do not have a top-heavy administrative staff to complete compliance items.	I monitor the compliance calendar and employ staff to complete tasks in a timely fashion. I delegate but at times am unsure of what results from delegation. I respond quickly to requests for information or documentation and know how to prioritize compliance activities as they relate to the whole of Academy operations and needs.	I miss or am unresponsive to deadlines. This leader promises to have work completed but frequently misses these deadlines. The minimally effective leader fails to put the right amount of resources into compliance matters—either having too many people working on a single project or too few.	I miss important submission deadlines and am not responsive to reminders or requests. I struggle to find balance in getting academy compliance work done in conjunction with everyday events and am often pulled off task.
Possible Evidences: Authorizer compli MDE	ance percentage report. 100% success on	OFS, MiTap or special education audits,	Timely submissions to the State and/or

Leader Reflection on Rules and Compliance:

Innovation (Weight: 18.75%)

Charter schools provide an opportunity to enact educational reform in a way that is innovative and creative to best meet the needs of students.

Innovation occurs when a school honors the whole child by creating practices that respect the fact that all children will learn when the environment accounts for the intellectual, social, emotional, developmental, and physical needs of each student.

deeply and the purpose of having a charter school in my community. Iand communicate this to all stakeholders. I shape what they dothe school. I do not evaluate the practices of the school as supportingschool or the purpose of charter schools in general. I do not recogni	Highly Effective	Effective	Minimally Effective	Ineffective
	deeply and the purpose of having a charter school in my community. I make decisions based on serving the needs of the students who attend my school and help staff understand the mission and why their school is not just a different choice in the community, but a better one. I can easily distinguish between practices and procedures that are designed for students and those that are designed for adult convenience. I am imaginative in constructing a school unlike the local school while still working within the rules.	and communicate this to all stakeholders. I shape what they do and how they do it around that "why." I am regularly engaged in analyzing school practices for their contribution to the overall goal of student learning and do research on potential changes and other innovative schools when it appears it is a good fit for my school community. I do not view rules and compliance as roadblocks and seek help from others if I have a great idea that will advance learning.	the school. I do not evaluate the practices of the school as supporting the mission of the school or as being necessary. I fail to see how school can be done differently and hide behind the belief that regulations require all schools to behave and look similar to one another.	schools in general. I do not recognize when others subscribe to actions or practices that are intended to punish or blame children for failures.

Leader Reflection on Innovation:

School leader Goals:

The response to these goals will be reviewed during the follow year's self-evaluation process.

Goal #1:

Measurement:

School leader Response:

Goal #2:

Measurement:

School leader Response:

Goal #3:

Measurement:

School leader Response:

Board Survey	Board Rating
Student achievement data is presented in a way that is understandable.	
Student achievement data is meeting the goals of the academy.	
Student retention data is presented in a way that is understandable.	
Student retention data is meeting the goals of the academy.	
Budget data is presented in a way that is understandable.	
The budget is meeting the goals of the academy.	
Academy has up to date policies and procedures in place.	
Academy is in compliance with all authorizer requirements.	
Academy is in compliance with all state and federal requirements.	
Academy receives minimal complaints.	
Your satisfaction with the school leader.	
Comprehensive rating	



Overall Summary This is the overview rating of your self-review and board surveys.

	Score
Principal Self-Review	
Student Achievement Review (25% weight)	
Overall Rating	

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Reliability

The creators of this tool shall collect and analyze evaluations across the portfolio of schools over the course of the next three years in order to determine the reliability, that is the extent to which ratings are consistent. Evaluators of the reliability of this evaluation tool will look at two forms of reliability: test-retest reliability and interrater reliability. The reliability of the Indicators of Excellence Evaluation Tool is grounded in the use of research from Robert Marzano and Lawrence Lezotte. Multiple observations, trainings, and the evaluation of pre-defined evidence and goals for that evidence lead to a reliable tool that is accurate in evaluating the effectiveness of school leaders in different settings and at different levels of experience.

Validity

Validity is determined by assessing whether a tool does what it says it will do. Thus, after establishing reliability, the evaluators of this tool will then work to establish validity: that is, it does effectively measure the leadership of school administrators. Because the Indicators Evaluation Tool is clear in its definitions of what a successful school will look like in whichever stage of development it is in, the tool is designed to measure the effectiveness of a charter school leader accurately. Additionally, the format of the tools implementation with embedded training, mentoring, and conferencing defines success for the charter school leader in Michigan.

Efficacy

The developers of the tool--as well as the school leaders who have been evaluated under it for the past few years--indicate, anecdotally, that it effectively guides the evaluator and school leader in identifying weaknesses in their leadership or administration as well as defining areas where school leaders are particularly successful. This is achieved through annual goal setting and refection.

As the tool is in its infancy, having been used in the current format for only the past three years, evidence of the Indicators Evaluation Tool's efficacy, reliability and validity will continue to be gathered over time.

Process

One of the duties Partner Solutions has to the Academy's Board of Directors and to the Michigan Department of Education is to "implement a process of evaluation for staff assigned to the Academy in compliance with all applicable law". Through the school leader, Partner Solutions is responsible "to evaluate, assign, discipline, and transfer personnel".

School leaders are a vital factor in the instructional success of their schools. We believe the most productive school leader evaluation is a structured and self-guided concurrent system built around a self-evaluation process. The following indicators of success will be used to evaluate the school leader and their administrators: student achievement; student enrollment, retention, and attendance; balanced budget; compliance; and innovation. The school leader and their administrators will receive a rating of Highly Effective, Effective, Minimally Effective, or Ineffective. As required by the MDE, these ratings factor into retention, promotion, and termination decisions.

Training

School leaders, and all other evaluators, are provided annual training in regards to the use, expectations and effectiveness of this tool. This is in accordance with both 380.1249b(1)(k) and 380.1249b(1)(l) of the Revised School Code.