

# 2009

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## *Intensive Partnerships to Empower Effective Teachers*

Bill & Melinda Gates Foundation



**Hillsborough County**  
PUBLIC SCHOOLS  
*Excellence in Education*

**2009-2010**

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## EXECUTIVE SUMMARY

The Bill & Melinda Gates Foundation has stated what should be obvious: "In order to achieve transformational results for students, we must focus on the heart of the educational experience: the learning partnership between teacher and student." What is not obvious is how to guarantee that all students will experience "learning partnerships" that prepare them for postsecondary education and the world beyond. Hillsborough County Public Schools is thrilled to have the opportunity to engage in an intensive learning partnership with the Gates Foundation, to establish those policies and practices that will most enrich the interaction between teacher and student.

Our proposal puts forth a <sup>7</sup>5-year plan to ensure that every classroom has a highly effective teacher. The plan, termed Project STARS (Supporting Teachers to Accelerate Results for Students), builds on our existing infrastructure to establish a comprehensive system of policies and practices designed to attract, support, reward, and retain our most effective teachers.

### Why Partner with Hillsborough

In the effort to place a strong teacher in every classroom, we believe that the Gates Foundation will not find a stronger partner than the Hillsborough County Public Schools (HCPS). As the nation's 8<sup>th</sup> largest school district, HCPS and its 12,500 classroom teachers educate 192,000 students spread across 248 schools. With communities ranging from the urban core of Tampa to suburban and farming areas, HCPS offers an unparalleled degree of geographic, economic, ethnic, and racial diversity—the ideal location for an intense research and development effort.

Moreover, HCPS enjoys strong relations with both its union leadership and staff at large. For instance, this year HCPS was the first district in Florida to reach agreements with its employee unions—a testament to our deep level of mutual trust. Similarly, in a Boston Consulting Group survey of more than 6,000 teachers and 500 school administrators, HCPS demonstrated extraordinary levels of employee engagement, with scores in the first quartile of all benchmark organizations. The degree of trust, collaboration, and engagement within HCPS vastly improves our ability to successfully implement an initiative as ambitious as Project STARS.

HCPS enjoys not just a strong, but also a highly productive relationship with the Hillsborough Classroom Teachers Association (CTA). For the past several years, HCPS and CTA together have been pursuing an innovation agenda that is highly aligned with the Gates Foundation's beliefs and priorities. For example, our priorities have included:

- ***Strategically focusing on preparing all students for college.*** Major efforts include:
  - Expansion of the Advanced Placement (AP) program, with the number of Black and Hispanic AP test-takers more than doubling over the past five years
  - First in the nation to implement the College Board's EXCEerator program district-wide
  - The only district in Florida to institute end-of-course exams in every single course
- ***Providing high-needs students with a world-class education.*** HCPS has established a range of programs, policies, and incentives focused on our high-needs students:
  - Enriched "magnet schools" situated in the city's toughest neighborhoods
  - High-needs "Renaissance" schools gain first access to new recruits
  - 5% bonuses for teaching in Renaissance schools and 5% more for school performance (plus an additional 10% for National Board Certified teachers)

## Supporting Teachers to Accelerate Results for Students (STARS)

- Teacher Incentive Fund (TIF) bonuses for teachers in high-needs schools who achieve outstanding student learning gains
- ***Rewarding teachers for demonstrated performance.*** HCPS teachers can already earn up to 50% of base salary in bonuses, including a range of bonuses driven by performance:
  - First district in Florida to win approval of its Merit Award Program (MAP), which awards 5% bonuses to individual teachers who deliver outstanding learning gains.
  - Advanced Placement / International Baccalaureate bonuses – teachers receive \$50 for each student whose score qualifies for college credit

Our long experience with managing pay-for-performance programs has uniquely positioned HCPS to create the nation's leading-edge teacher compensation plan. Not only have we already developed the data systems necessary to measure every teacher's "value-added." Through running the MAP program, now in its 5<sup>th</sup> year, HCPS has also learned firsthand how crucial it is to: 1) involve all stakeholders in the process; 2) be responsive to the concerns of classroom teachers; 3) intensively communicate with employees; and 4) ensure that measures of teacher effectiveness are regarded as "reliable, valid, fair, and easy to understand," as CTA President Jean Clements recently told a U.S. Department of Education audience.

### Our Vision for Success

HCPS is proud of our successes in narrowing achievement gaps, broadening access to rigorous college-level coursework, and improving graduation rates. Evidence of the district's achievements include:

- An "A" rating under Florida's A++ accountability system in three of the past four years
- More than half of our high schools named to *Newsweek* magazine's list of America's Best High Schools; three schools finished in *Newsweek*'s top 100
- An overall graduation rate of 80%, highest among large Florida districts
- 90% graduation rate from our IB programs, higher than the U.S. and world averages

Nevertheless, HCPS has a long way to go to meet the challenge of preparing every student for college. Consider the following:

- Today, by our best estimates, just 37% of our students graduate college-ready
- Just 15% of students meet ACT college readiness benchmarks in all four subjects
- While AP participation is rising, students pass the exams just 38% of the time
- There remain wide achievement gaps among socioeconomic, racial, and ethnic groups:
  - 60% of White students meet ACT college readiness benchmarks in reading, compared with just 33% of Hispanic students and 20% of Black students
  - White, Hispanic, and Black graduation rates are 85%, 72%, 65% respectively
- Low performance is everywhere, not just in the core urban areas—in fact, 60% of our lowest achieving students are being schooled in our high-performing "A" and "B" schools

Over the next five years, the district's goal is to increase the share of students graduating college-ready to 60%. We will accomplish this by:

- Vastly increasing the number of teachers capable of delivering outstanding learning gains
  - Under our new career ladder, moving our distribution of teachers from roughly 10% "Master," 30% "Advanced," and 40% "Career" to 20%, 30%, and 30%, respectively
- Continuing to strengthen our array of programs targeting college readiness

### **Our Strategy**

We believe that in order to achieve improvements in student performance never before seen on this scale, we must focus on the key point of leverage: the effectiveness of our classroom teachers. This does not simply mean focusing on talent management, however. It requires a holistic view of all the factors that influence a teacher's classroom performance:

- The goals and objectives we set for school systems, schools, and teachers
- District and school leadership practices and working conditions
- Talent management policies and practices
- Foundational infrastructure, including the assessments, instructional tools, and data necessary to support effective instruction

Project STARS is composed of a highly integrated set of initiatives designed to address each of these key levers. These initiatives include a set of core and enabling initiatives:

### **Core Initiatives**

**Strategic Initiative #1: Measuring Teacher Effectiveness.** Core to our plan is the fundamental redesign of our teacher evaluation system and linkage to professional development. The new system will include teams of highly trained peer evaluators who will provide an external objective perspective. In addition, at least 40% of a teacher's evaluation will be based on student learning gains. Professional development opportunities and requirements will be closely linked to identified weaknesses, and evaluation performance will play the dominant role in determining teachers' career opportunities and compensation.

**Strategic Initiative #2: Performance-Based Career Ladder.** We will establish a career ladder that clearly defines the performance level required for tenure as well as the levels required for advanced roles. Consistently delivering adequate student gains will be required to become a tenured teacher. Also, on a far more frequent basis, we will extend the non-tenured "Apprentice" period from 3 to 4 years, in order to provide at least three years of student learning data against which to evaluate teachers. We will also create teacher-leader roles that enable great teachers to increase their responsibilities and pay, without leaving the classroom.

**Strategic Initiative #3: Next Generation Pay-for-Performance.** HCPS has designed a leading-edge teacher compensation system that awards large salary increases based on sustained performance and progress up the career ladder, rather than years of experience or credentials. We will build on our experience to address flaws that harmed perceptions of the MAP system. For instance, performance levels will be tied to a more valid and reliable 3-year average of student learning gains. Moreover, we will establish absolute standards of performance to which all teachers can aspire, rather than artificially capping the number of teachers who can attain "Master" or "Advanced" status. Observational evaluations of a teachers' instructional practices will also play a larger role in determining performance-based pay, as the training of school administrators and peer evaluators will enable them to more effectively differentiate performance. The plan will also simplify the system for teachers by combining a number of different pay-for-performance plans into a single salary structure tied to their evaluation performance. Beginning with the 2010-11 school year, all new teachers will be placed on the new salary schedule, while it will be optional for existing teachers. Under this plan, young, exceptional teachers will be able to earn as much as a 20<sup>th</sup> year teacher currently earns. The goal is to retain our finest teachers and to attract a new pool of talented professionals into the field.

**Strategic Initiative #4: Programs and Incentives for High-Needs Students.** HCPS will develop further policies and incentives to address both schools with a critical mass of high-needs students, as well as the 60% of high-needs students who are located in our highest-performing schools. For the latter, principal evaluations will be based in part on the performance gains of the lowest performing students, and a new incentive will be paid to teachers for achieving significant performance gains with any low performing student. For high-needs schools, HCPS will focus on attracting and retaining high-quality teachers through a mixture of retention bonuses and new urban teacher and principal residency programs that will train staff to specialize in high-needs schools.

**Strategic Initiative #5: Apprentice Teacher Acceleration Program.** To address the high attrition rate among new teachers and to accelerate their growth in performance, HCPS will implement a comprehensive, high-quality induction program. Key elements include:

- Experienced and effective teachers serving as mentors in a full-time capacity
- Intensive one-on-one support with weekly observation and feedback for the first 2 years

#### **Enabling Initiatives**

**Strategic Initiative #6: Enhanced Recruitment and Dismissal.** To manage the new evaluation system and the higher expectations for the dismissal of ineffective teachers, principals will need significant support from Human Resources (HR), for which HCPS will create a new function, HR Business Partners, to support all of a school's staffing needs. The district will also use data more effectively in recruiting the best candidates from the best programs.

**Strategic Initiative #7: Strengthen School Leadership.** Effective leadership is critical to achieving any major gains in student achievement. Our plan will align our principal evaluation system with our expectations for growth in student performance, especially of high-needs students, and our expected growth in teacher effectiveness.

**Strategic Initiative #8: Performance Management.** HCPS will create school and district performance scorecards, in order to focus HCPS personnel and the community on the core metrics by which to measure our progress. HCPS will also develop data dashboards to enable teachers and principals to make real-time adjustments to instructional or management practices.

**Strategic Initiative #9: Integrated Instructional Toolkit.** Critical to the success of our plan will be an overhaul of the instructional tools the district makes available to our teachers. Key initiatives include the development of model lesson plans and pacing guides for all subjects, and the development of formative assessments to track progress on a real-time basis.

**Strategic Initiative #10: Change Management / Communications.** To succeed with this large-scale transformation effort, we will need to build the support of all HCPS stakeholders. The project's vision and goals must be well-articulated, and frequent pulse checks must be taken to gauge stakeholder buy-in. HCPS will open lines of communication with teachers, and will share successes with the community at large, in order to grow support for project goals.

#### **Implementation Plan and Risk Mitigation**

HCPS has organized the implementation of Project STARS into four main phases:

- *Phase 1: Organizational design and workplanning (August 2009 – January 2010).* Develop overall project management structure and fully staff the Project Management Office. Develop detailed workplans and begin critical design work.
- *Phase 2: Initiative design (January 2010 – June 2010).* Complete design of all initiatives, especially new evaluation instruments and refinement of the value-added measure.
- *Phase 3: Initiative roll-out (2010-2012).* Launch and implement all initiatives district-wide.
- *Phase 4: Ongoing monitoring, evaluation, and refinement (2012-2014).* Continuously monitor progress against milestones and outcomes; refine initiatives as necessary.

HCPS will establish a Project Management Office reporting directly to the Superintendent. Project managers will work closely with executive sponsors and initiative owners to drive design and implementation. The PMO will also be responsible for tracking and reporting progress against both execution milestones and key outcomes. Significant external partners needed to execute this effort include Cambridge Education (teacher evaluation and induction), The Boston Consulting Group (project management / initiative design support), the New Teacher Center (new teacher induction), and Mathematica (value-added measure, research and evaluation), and a communications firm such as Hill and Knowlton.

HCPS is well aware of the risks and challenges associated with a transformation effort of this scale. For instance, the entire effort hinges on our ability to accurately measure teacher effectiveness. To ensure a well-functioning evaluation system, we will leverage the expertise of external partners to train evaluators and to refine our measure of value-added. Other major risks, such as failure to gain employee buy-in, will be managed through an intensive change management effort. The risk of union tension has been mitigated through a Memorandum of Understanding that commits all parties to the core elements of this plan.

#### **Overall Project Budget and Request to the Bill & Melinda Gates Foundation**

Project STARS requires an investment of \$202M over five years. We are asking the Gates Foundation to fund \$100M of the project to support both capacity-building costs and a gradually decreasing percentage of ongoing costs. The district will fund \$102M of project costs through resource reallocations and aggressive pursuit of external funding. Our highly successful grants team has brought in more than \$30M a year in funding, and we will seek additional funding from TIF, Race to the Top, and other sources to reduce the impact on both HCPS and BMGF. HCPS also commits to fund an ongoing \$32.5M per year after the 5-year grant period. Funding ramps have been designed such that HCPS takes on a greater share of ongoing costs over the 5-year period, in order to build sustainability into the plan. The district's careful financial management has enabled the district to weather the current economic crisis without instructional cuts. We will bring the same fiscal prudence to our partnership with the Gates Foundation.

#### **Capturing Lessons Learned and Evaluation**

Ongoing evaluation is critical to the success of this project. HCPS evaluation personnel will partner with Mathematica and BMGF evaluators to assess initiative progress. Progress reports will be used to modify implementation where needed, and to document success so that initiatives can be scaled effectively. Specifically, HCPS will be looking to answer questions on the following: the impact of new evaluation and compensation systems on teacher motivation and recruiting; induction's impact on teacher performance growth; and the strength of incentives for effective teachers to work with low-performing students.

## INTRODUCTION

Hillsborough County Public Schools (HCPS), which serves the city of Tampa and the surrounding communities, is the 8<sup>th</sup> largest school district in the nation, with 192,000 students in over 248 schools. HCPS employs about 12,500 classroom teachers and 25,000 total staff, making HCPS the largest employer in the county. The district's geography and student population are highly diverse, with large farming areas to the south and east, numerous suburbs, and a dense, urban core. The racial and ethnic makeup of the district as of October 2008 was 42% White, 22% Black, 28% Hispanic, 5% Multiracial, 3% Asian, and 0.3% American Indian. In recent years, the district has experienced explosive growth, opening six new schools a year for the past decade. The downturn in the economy and hard-hit real estate sector has also resulted in more children qualifying for the federal free and reduced-price meal program. Today that rate stands at over 50% of all HCPS students, which is well above Florida's average rate.



*Longevity*

HCPS is governed by a seven member elected School Board, which is charged with selecting the Superintendent. Unlike many large school districts, the district's senior leadership is notable for its longevity in their current positions. The district's current Superintendent is entering her 5<sup>th</sup> year in that position, with over 20 years experience in the district. The Board's most junior member is entering her 4<sup>th</sup> year in that position, while the Board Chair has been a Board member for 16 years. In 2005, The Board received the prestigious Council of Urban Boards of Education Award for Excellence in Board Governance. Working closely with the Board and district leadership is the Classroom Teachers Association (CTA), the district's bargaining unit. Again, unlike most large school districts, the CTA and the district have a long history of a trusting and collaborative working relationship. Most recently, they worked together to innovate in controversial areas such as pay-for-performance.

## PROJECT DESCRIPTION

### Vision of success

Hillsborough County Public Schools, in partnership with the Bill & Melinda Gates Foundation, seeks to launch a bold and comprehensive 5-year strategic plan, Project Supporting Teachers to Accelerate Results for Students (STARS), to dramatically improve the effectiveness of all teachers and, consequently, the achievement of our students. To set our sights on the ultimate goal, HCPS has developed both a single measure of college readiness and a cascading set of related outcome measures.

Our definition of college readiness relies on Florida and the district's robust data systems. We have developed a genuine measure of postsecondary success for all our students, which factors in our 9<sup>th</sup> grade enrollment, high-school graduation rates, postsecondary enrollment rates, and performance at the postsecondary level (in terms of GPA). The resulting metric reflects how many of our 9<sup>th</sup> graders go on to succeed in college or trade / technical school. This likely understates the percentage, since Florida's system has difficulty tracking students who go out-of-state for postsecondary school. Nevertheless, it provides a baseline measure of our ability to graduate students who are college-ready (estimated at 37%). Project STARS' 5 year goal of 61% reflects our goals for the cascading set of outcomes leading to postsecondary success:



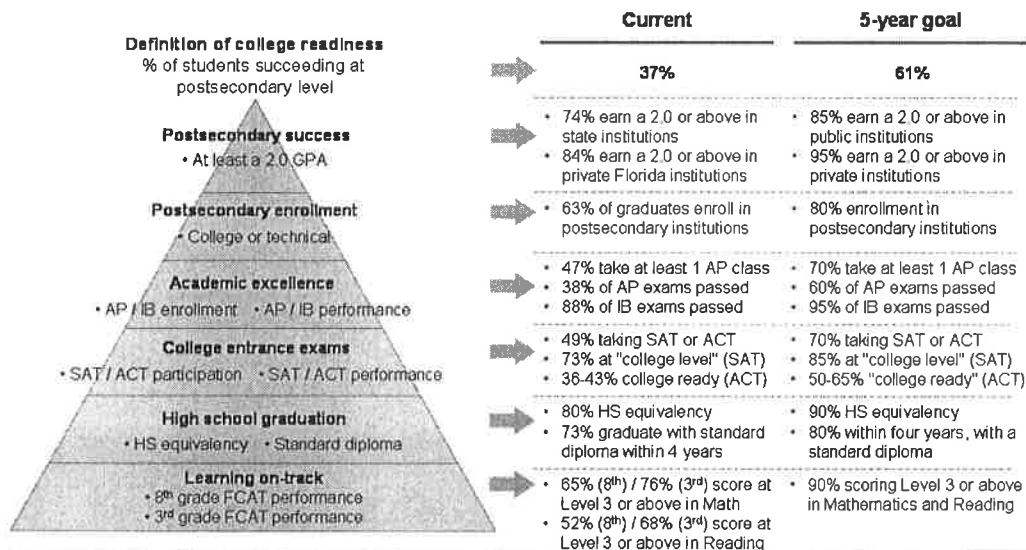
- A high-school graduation rate of at least 90%, up from today's 80%
- At least 80% of our graduates enrolling in postsecondary education, up from 63% today
- At least 85% of postsecondary enrollees earning a GPA of 2.0 or above in state institutions, up from 74% today

Big goals

Our vision of success also incorporates measures of on-track learning and academic excellence that will enable us to track progress against key milestones leading to postsecondary success. These include:

- Florida Comprehensive Assessment Test (FCAT) reading and mathematics performance in the 3<sup>rd</sup> and 8<sup>th</sup> grades
- SAT and ACT test-taking and performance against measures of college readiness
- Advanced Placement (AP) and International Baccalaureate (IB) course-taking, exam-taking, and performance against measures of college readiness

Figure 1: HCPS five-year student outcome goals



#### Baseline

HCPS has made substantial progress on a range of student outcomes tied to postsecondary readiness, but achievement levels among racial / ethnic subgroups are still low.

**Issue #1:** *A lower percentage of HCPS graduates enroll in postsecondary institutions than graduates statewide in comparable school districts.*

- 63% of HCPS graduates enroll in postsecondary institutions compared to 65% statewide and 72% in a comparable district (Appendix Figure 1).

**Issue #2:** *The district's graduation rate calculated by Florida is high relative to comparable districts. However, it is much lower when calculated using methodologies more reflective of true college readiness. Wide gaps also exist among ethnic / racial and economic subgroups.*

- HCPS improved its four-year Florida graduation rate to 80%, and NCLB rate to 78%. Utilizing approaches which are more closely aligned to the new proposed Florida and national calculations, the graduation rate is closer to 66% (Appendix Figures 2, 3).

**Issue #3:** *While AP participation rates have risen significantly, performance on AP exams has dropped (Appendix Figures 4, 5).*

- Nearly 50% of our students take at least one AP course, up from 28% in 2004 and significantly higher than the statewide rate of 35%.
- However, the percentage of students scoring 3 or above has decreased to 38%.

**Issue #4:** *While SAT and ACT participation rates have increased significantly, few students are meeting standards for college readiness. Wide gaps exist among ethnic/racial subgroups (Appendix Figures 6, 7, 8).*

- Nearly 65% of HCPS graduates took the SAT in 2007 and 39% took the ACT. Of SAT test-takers, 46% were minority students. There has been a 44% and 77% increase over the past five years in participation by Black and Hispanic students, respectively.
- 15% of ACT test-takers meet college readiness benchmarks in all four subjects (25% of white test-takers meet benchmarks compared to 3% and 8% for Black and Hispanic, respectively).
- 74% of SAT test-takers scored at or above college-level cut scores.

**Issue #5:** *Low rates of FCAT proficiency overall, and wide disparities by subgroup.*

- Across the district, 60% of HCPS students are proficient and above on the FCAT in Reading and 67% in Math, with much lower rates for Black, Hispanic and economically disadvantaged students (Appendix Figure 9).

**Issue #6:** *While HCPS has traditionally focused on schools with high concentrations of economically disadvantaged students, 60% of the district's lowest-performing students are in high-performing schools, those rated by Florida as "A" or "B" (Appendix Figure 10).*

- We recognize that this is not a problem limited to "D" and "F" schools in the urban core, but rather a district-wide issue that requires a systemic solution.

## STRATEGIC INITIATIVES

While we have seen significant gains in the areas of greatest focus, it is vital to be clear about the monumental task at hand: Achieving the dramatic increases in student achievement and postsecondary readiness we seek will require nothing less than the kind of focus, expertise, intensity of effort, and level of resources last seen when President John F. Kennedy announced his intention to land an astronaut on the moon. As Jean Clements, President of the Hillsborough Classroom Teachers Association, recently said at a U.S. Department of Education event where President Obama announced the release of federal "Race to the Top" guidelines, "There is no 'one thing' that will improve teacher quality or student achievement. Not achievement tests, the collection of data, grading our schools, new teacher and principal evaluations, powerful curricula, *or* professional development. Certainly not performance pay. There are no simple answers to the very complex question of how to improve teaching and learning in our schools. If it were easy, it would have been done by now."

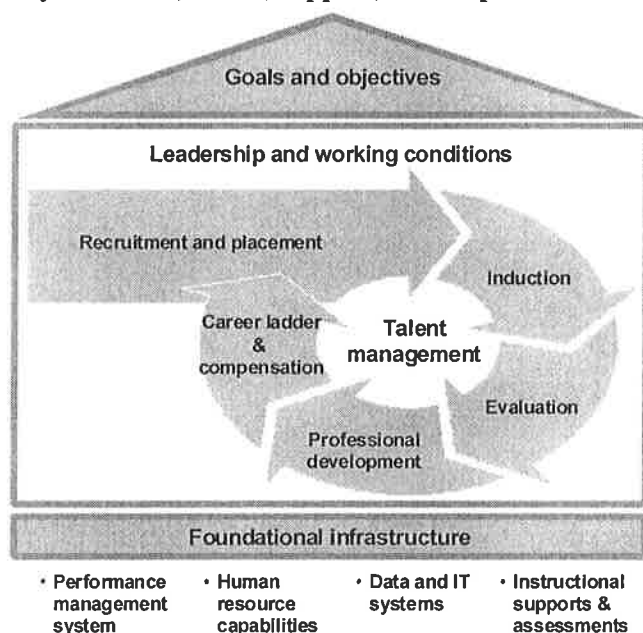
To take such a comprehensive approach will also require deep partnerships with the Union and with the local Hillsborough community, teacher training institutions such as the University of South Florida, Florida state government, private corporations and foundations, and the federal government, such as securing support from the Teacher Incentive Fund and Race to the Top grants. This is the kind of comprehensive partnership the Bill & Melinda Gates Foundation

invited HCPS to design, and it is the kind of partnership we believe is necessary to deliver on our vision.

We believe that in order to achieve and sustain improvements in student performance never before seen on a scale as large as our district's, we must focus on the key point of leverage: the quality and effectiveness of our classroom teachers. This does not simply mean focusing on talent management, however, it requires a holistic view of all the factors that influence a teacher's classroom performance (Figure 2):

- The goals and objectives we set for school systems, schools, and teachers
- District and school leadership practices and working conditions
- Talent management policies and practices
- Foundational infrastructure, including the assessments, instructional tools, and data necessary to support effective instruction

**Figure 2: Boosting student achievement requires a systemic approach that addresses all the factors necessary to recruit, retain, support, and empower effective teachers**



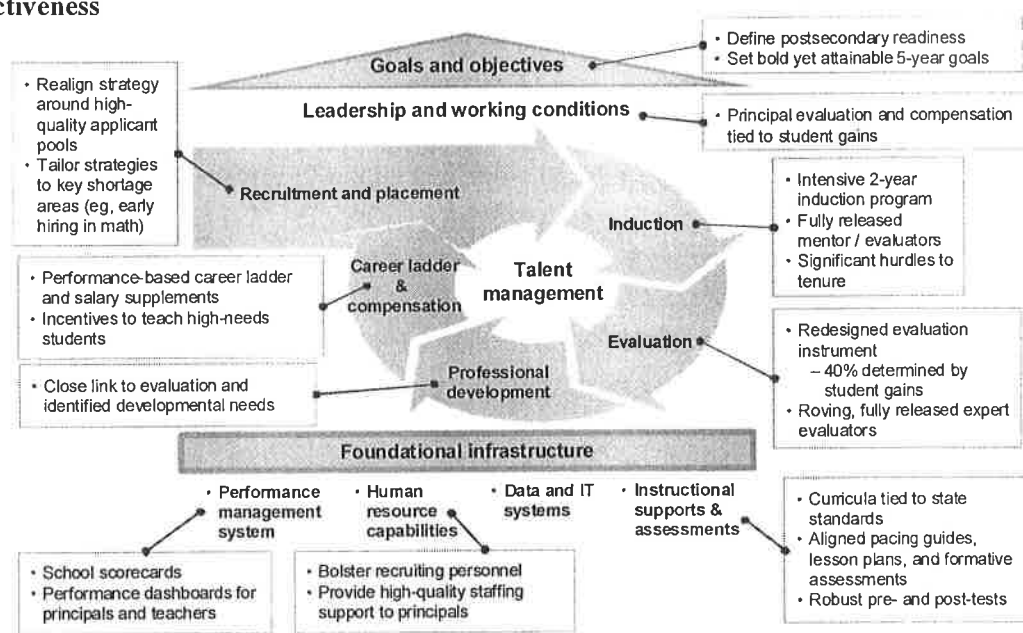
With the need for systemic change in mind (Figure 3), we are committed to launching a highly integrated set of initiatives designed to:

- Set bold yet attainable student achievement and postsecondary readiness targets
- Align the metrics, tools, and processes by which we measure district and school performance and hold leaders accountable
- Align the evaluation and compensation of principals with our goals and strategic priorities
- Rigorously measure and evaluate the effectiveness of all teachers
- Make tenure into a more significant hurdle, based on demonstrated performance

## Supporting Teachers to Accelerate Results for Students (STARS)

- Provide the training and supports necessary to vastly accelerate the performance and growth of our new teachers
- Link teacher evaluation and identified areas for development to ongoing professional development opportunities
- Replenish our pipeline with high-quality teaching candidates
- Promote and compensate teachers based on their demonstrated performance
- Ensure that our highest-needs students are taught by effective teachers
- Support teachers by providing the tools and assessments necessary for effective instruction

**Figure 3: HCPS strategic initiatives represent a systemic approach to enhancing teacher effectiveness**



In the following section, we describe each of our initiatives in detail, including the vision of success for each initiative; the current state of our policies and practices in each area; and the key elements of each initiative. We believe that it is only through this comprehensive approach to enhancing the quality and effectiveness of our teachers that we will achieve the magnitude of change envisioned by our School Board and district and teacher union leadership.

### **INITIATIVE 1: MEASURING TEACHER EFFECTIVENESS**

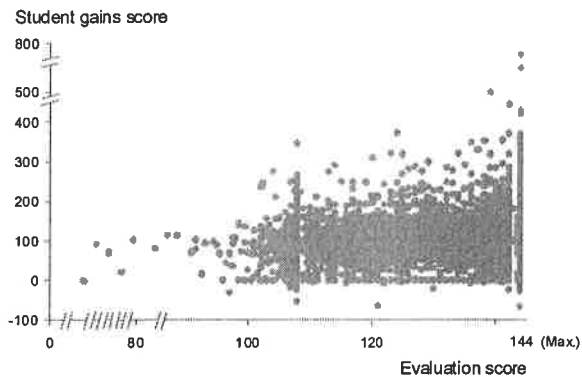
#### **Motivation for Initiative**

Project STARS' revised evaluation system will integrate teacher evaluation and customized staff development. The evaluation system will provide an accurate assessment of teacher performance that will facilitate recognition and, if necessary, dismissal of individual teachers. This new measure of teacher effectiveness will be built into our policies and practices for promotion, compensation, recruitment, placement, and professional development.

Under the current system, principals act as the sole evaluator of teacher performance. The evaluation criteria include: 1) Instructional Effectiveness, 2) Planning and Preparation, 3) Professional Behaviors, 4) Techniques of Instruction, and 5) Classroom Management. Teachers may be rated Outstanding, Satisfactory, Needs Improvement, or Unsatisfactory. The chief shortcomings of this system are:

**Issue #1:** *Teacher evaluation scores are not significantly driven by student outcomes.* Currently, just 7% of the maximum points possible are directly linked to student achievement, while 93% are related to other professional behaviors. This provides opportunity for a teacher with a perfect score to have lower student achievement gains than a teacher rated "Satisfactory." Overall, evaluation scores are not well correlated to student gains (as measured by Merit Award Program (MAP) effectiveness scores), partially because evaluations are completed before gains data are available (Figure 4).

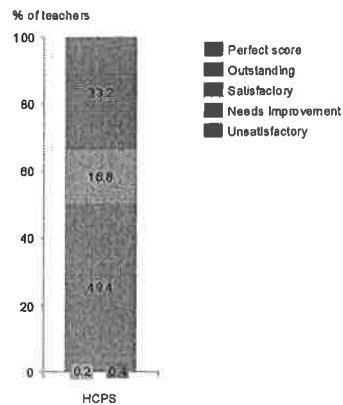
**Figure 4: Current teacher evaluation scores are not correlated to student gains**



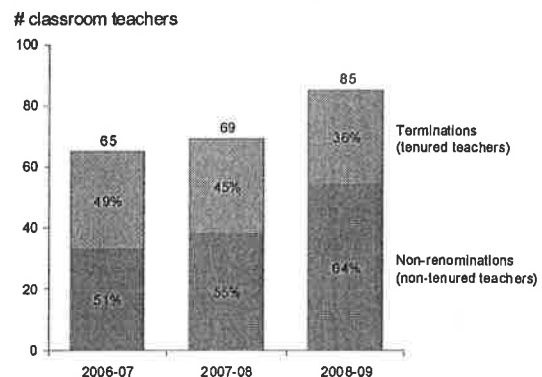
**Issue #2:** *Poor performance is rarely identified, and there is little differentiation for truly exceptional performance.* In the 2007-08 school year, 33% of all teachers in HCPS received a perfect score. A full 50% were rated "Outstanding", the top performance level possible. Of the remaining teachers, 49.5% were rated "Satisfactory", and a scant 0.4% were rated "Needs Improvement", while only 0.2% were rated "Unsatisfactory" (Figure 5). Teachers who receive an "Unsatisfactory" for two years in a row face possible dismissal following contractual due process.

However, the small number of teachers rated "Unsatisfactory" leads to only a small number of teachers dismissed annually (Figure 6).

**Figure 5: Current teacher evaluation scores are not correlated to student gains**



**Figure 6: Only 0.5% of teachers are terminated annually**



Numerous factors drive the over-identification of high performers:

1. Inadequate weighting of the most important measures of teacher effectiveness.
2. Limited use of objective measures to evaluate teaching behaviors and performance.
3. Lack of rubrics and clearly articulated levels of performance.
4. Varied levels of principal capacity to conduct the quantity and quality of classroom observations necessary to develop well-informed views of teacher performance.

**Issue #3:** *Limited, principal-based view of performance.* HCPS uses the required Florida Performance Management System (FPMS) framework to conduct formative and summative observations. Summative FPMS observations are only required of tenured teachers every three years. This results in limited observation and feedback given to tenured “Satisfactory” or “Outstanding” teachers. Administrators are also charged with conducting regular classroom walk-through observations on all teachers, but actual behavior varies depending on the principal’s workload. Other perspectives, such as feedback from peers, parents and students, are not incorporated into the evaluation; it is solely based on the principal’s limited view. In addition, principals are often evaluating teachers without the appropriate content knowledge of the subject being taught, especially at the high school level. This further compromises the validity of the teacher evaluation process.

**Issue #4:** *Weak link between professional development and key areas for improvement.* Except for those teachers who receive an “Unsatisfactory” rating, principals are not required to give written feedback to teachers, resulting in a lack of actionable feedback and identified areas for development. In addition, there is no mechanism in place to prescribe specific training to teachers based on their classroom needs and areas for development, as teachers are responsible for creating their annual individual PD plans and alone decide which courses to take.

**Issue #5:** *Inability to drive a district-wide professional development strategy that is informed by identified weaknesses and areas for development within the teaching corps.* The current pencil and paper evaluation process requires that administrators tabulate scores manually. Final evaluation scores are then manually entered into the Human Resources (HR) database. This inefficient process hinders the district’s ability to track teacher performance and areas of weakness, at a school- or district-wide level, in order to develop a professional development strategy and set of course offerings tailored to identified needs.

#### **Description of Initiative**

To address the issues of accurately evaluating teacher performance and developing high-quality teachers, HCPS will redesign the district’s evaluation and PD system. The redesigned system will require a significant shift in culture which will be achieved through intense communications and training efforts. Key to success is the addition of teams of highly trained, experienced, effective teacher evaluators who will provide an external objective perspective. These additional evaluations will bolster the information available on individual teacher performance and support the principal and the district in determining teacher effectiveness. Importantly, it will also provide rich data and information that can be directly linked to mentoring and professional development. This initiative will be owned by the Human Resources department in collaboration with Staff Development. Key elements of the district’s integrated evaluation system will include:

**Redesigned evaluation criteria and instrument:** The district will ground its new evaluation system in a clear definition of teacher effectiveness. HCPS will partner with an external provider, such as Charlotte Danielson, to craft a new teacher evaluation instrument, accompanying rubrics, self-evaluation instrument, classroom walkthrough forms and parent / peer / student surveys. Since student gains will be a significant component in the new teacher evaluation score, HCPS plans to engage a third party partner (possibly Mathematica, Stanford's Center for Research on Educational Outcomes, or the University of Wisconsin's Value-Added Research Center) to help redesign its value-added measure. The new criteria and instrument will include:

- a. Greater differentiation, scoring teachers on a scale from 1 to 5 (5 = highest standards of performance; 1 = performance significantly below expectations)
- b. 40% weighting on teachers' "value-added," as measured by student learning gains
  - i. In subject areas where robust, high stakes exams exist, a rolling 3 year average will be utilized
  - ii. In subject areas where exams are less robust, alternative (school / team) measures may be used
- c. 60% weighting on end-of-year evaluations performed by principals and expert teacher evaluators, with the following weights:
  - i. Administrator: 30% (High School / Middle School) / 40% (Elem)
  - ii. Teacher evaluator: 30% (HS / MS) / 20% (Elem)
- d. The administrator / expert teacher assessment has well-articulated desired teaching behaviors with a scoring formula weighted towards the most important elements:
  - i. Instruction – 75%; designing and planning instruction – 15%; learning environment – 5%; responsibilities – 5%
- e. Required identification of strengths and areas for development

**Redesigned evaluation process:** The new process will incorporate feedback from not only the principal, but also new teams of expert teacher evaluators, peers in Professional Learning Communities (PLC), students, and parents. HCPS will field test and validate the following tools as inputs into the evaluation system:

- a. Student survey to assess instruction (MS / HS)
- b. Parent survey to assess responsibilities
- c. Peer survey to assess planning and collaboration

The combination of principal, expert teacher evaluator, peer, and student input will ensure that teachers receive rich developmental feedback. The number of observations will be triggered by performance, with lower-performing teachers receiving more frequent formative evaluations and coaching time. The new performance levels will have explicit progression and exit implications to clearly articulate consequences for underperformance (see Figure 7). Levels of intervention include the number of formative evaluations and amount of coaching time and will be tailored to performance levels. Underperformers will receive the most intensive support.

**Figure 7: Number of formative evaluations is tailored to performance levels**

Performance level	Description	Expected initial distribution	Progression / exit Implications	# of evaluations		
				Admin.	Revolving	Total
5	Highest level of practice	10%	Candidate for instructional leader role	Evaluative 1	Formative 1 Evaluative 1	3
4	Strong practice, contribution, record of performance	30%	Candidate for mentor / evaluator role	Evaluative 1	Formative 2 Evaluative 1	4
3	Minimum level. Consistently delivers adequate gains	40%	No explicit exit timing. Hope to move up, but not necessary	Evaluative 1	Formative 3 Evaluative 1	5
2	Needs significant improvement	15%	2-3 years = dismissal	Formative 2 Evaluative 1	Formative 7 Evaluative 1	11
1	Poor performer	5%	1-2 years = dismissal	Formative 2 Evaluative 1	Formative 7 Evaluative 1	11

**Expert teacher evaluators:** HCPS plans to hire and train a corps of expert teacher evaluators who, alongside principals, will be responsible for delivering both formative and summative evaluations to every teacher. Selected from among the district's highest-performing classroom teachers, these evaluators will serve 2-year rotations before returning to the classroom or taking administrative roles. Based on current projections, the district will need 82 evaluators per year (based on a ratio of ~18 observations / week / evaluator). This number should decrease over time as the number of underperforming teachers, who require the most intensive support, are removed from the system.

Due to the size of the district's teaching staff, the number of evaluators represents less than 1% of the total classroom teachers, ensuring little negative impact on student achievement. Applicants for this position may also include current content coaches who are not assigned to a classroom, further mitigating impact. Moreover, HCPS believes that the experience of evaluating peers and observing other teachers will strengthen a teacher evaluator's teaching skills, and will help build a corps of teacher leaders in our schools.

Evaluators will be overseen by team leads, a new role created to manage the evaluation process and teacher evaluators. The intention is to eventually promote these individuals from the ranks of teacher evaluators. HCPS will need four team leads per year to ensure a ratio of 1 team lead for every 25 evaluators. Their role will be to orchestrate and schedule the evaluation process district-wide and to ensure evaluation quality and inter-rater reliability between administrators and teacher evaluators (80% of time). They will also continue to spend 20% of their time in the field conducting teacher evaluations to maintain expertise.

**Expert-driven training of administrators and teacher evaluators:** HCPS has engaged Cambridge Education, an external partner with deep expertise in teacher evaluation training and support, to provide intensive training for administrators, teacher evaluators, and district staff. During the launch year, Cambridge's expert evaluators will work alongside HCPS teacher evaluators to augment the staff and build capability. They will also serve in a supervisory capacity to oversee the teacher evaluators, provide quality assurance, and ensure inter-rater reliability. They will help to drive the cultural shift required and monitor the quality of the process, both of which are absolutely critical for the new evaluation system to be effective.



**Tight links to professional development:** The new evaluation process will require evaluators to identify strengths and areas of development for teachers. They will then need to make specific recommendations on professional development needs, opportunities, and requirements based on identified strengths and weaknesses. Significant enhancements to the process will include:

Enhancements to current PD efforts	Implementation details
Evaluator identification of top 3 overall strengths and developmental needs to achieve next performance level	Strengths to document will include communications, mentoring, and leadership capabilities so that those teachers can be candidates for advanced teaching roles
Revise teacher self-assessment to include reflection on instructional improvements	Utilize different tool other than teacher self-evaluation
Evaluators and/or administrators recommend specific PD tied to areas in need of improvement	Clear listing of supports that will help teachers improve: specific training courses to attend, instructional strategies to implement, other teachers to observe, etc.
Individual PD plans and recommendations captured electronically in a format that can easily be aggregated at the school and district level	Individual PD plans and PD recommendations will be tracked over time and monitored for completion of recommended training courses
Greater usage of just-in-time resources to support teachers to maximize value of interim evaluations	Potential online resources include: videos showing difference between performance levels for each element, library of past trainings, forum for best practice sharing

**Enhanced technology and data capture:** The system's provision for frequent evaluations and tighter link to professional development will need to be supported by appropriate technology tools and processes. PDAs and tablet PCs will be needed to enable efficient information capture by evaluators without follow-up data entry. Enhanced data systems and software will enable the aggregation of evaluation results and the informing of professional development strategies.

#### Plan of Action

##### Key activities and execution milestones

**Activity #1:** Align with definition of teacher effectiveness. Create evaluation instrument, weighting of each element, rubrics, objective measures to evaluate each element, and value-added measure. Design peer, student and parent survey instruments.

- Milestone: Teacher evaluation instruments redesign complete by January 2010.
- Milestone: Value-added measure redesigned by June 2010.

**Activity #2:** Recruit and select evaluators. Train all evaluation personnel (teacher evaluators, principals, assistant principals, and key district staff).

- Milestone: Expert teacher evaluators selected, trained, and in place by August 2010.

**Activity #3:** Field testing of instrument and process. Gather and incorporate teacher and evaluator feedback. Assess value of survey data and decide how it will be included in the evaluation.

- Milestone: New evaluation piloted for all teachers by December 2010.

**Activity #4:** Full roll-out with ongoing feedback and adjustments as necessary.

- Milestone: All teachers evaluated under new system by September 2011.

**Key outcomes**

**Outcome #1:** At least 15% of workforce identified as performing well below expectations and provided with additional supports or, when necessary, dismissal.

**Outcome #2:** At least 5% of tenured teachers dismissed for underperformance annually.

**Outcome #3:** 95% of teachers deliver adequate yearly student gains as defined by new value-added measure.

$$12,500 \times .05 = 625$$

**INITIATIVE 2: PERFORMANCE-BASED CAREER LADDER**

**Motivation for Initiative**

As critical as the need to identify high-performing teachers is the need to provide teachers with opportunities for career advancement while remaining in the classroom. A defined career ladder provides a means to recognize teachers who have developed a certain level of performance, encourages teachers to progress along a path of continuous improvement and creates additional roles that develop a teacher's capabilities in mentoring, evaluation, and instructional leadership.

**Issue #1:** *HCPS currently lacks a robust and defined teacher career ladder.* School-based advanced roles include lead teachers and department heads who take on extra administrative responsibilities. This typically involves a lighter teaching load and/or a salary supplement. Non-classroom roles include resource teachers and subject coaches at the school level and district resource teachers located at the central office who support classroom teachers. These roles do not typically include a salary increase. Current roles do not encompass leadership responsibilities such as evaluating teachers or functioning as instructional leader at the school site.

**Issue #2:** *Tenure is granted based on experience not demonstrated performance.* Currently, HCPS culture views tenure as a reward for the satisfactory completion of three years of teaching, rather than a distinction earned based on demonstrated instructional effectiveness. New teachers who complete three consecutive years of teaching and are re-nominated by the principal for a fourth year without reservation are then tenured. A fourth probationary year may be required by the principal. At the end of the fourth year, if performance is satisfactory, the teacher is tenured. The vast majority of teachers eligible for tenure each year receive it; only 2% of teachers in 2007-2008 did not.

**Description of Initiative**

A new career ladder based on differentiated teacher performance has been developed that clearly defines the performance level required for tenure as well as the performance levels required for new advanced roles (Figure 8). For new teachers, achieving tenure is linked to moving from an Apprentice to a Career teacher. A Career teacher is defined as someone who consistently delivers adequate student gains, the minimum bar for all tenured teachers.

The new career ladder emphasizes sustained performance. A teacher is required to exhibit performance at a new level for two years to achieve a new step along the career ladder. Higher performing teachers, at the Advanced or Master level, have the opportunity to become Mentors / Evaluators, the rotational mentor and teacher evaluator roles in the new evaluation process and induction program. Exposure to teaching practices in classrooms across the district and the ability to coach and mentor peer teachers will give teachers valuable expertise when they return to their own classrooms and schools. Master teachers will have the opportunity to become Instructional Leaders, a leadership role within their school with responsibilities for managing

PLC (teacher collaboration teams), modeling lessons, team teaching, coaching teachers in the analysis and use of student data to improve differentiated instruction, conducting classroom observations and providing input into the administrator evaluations of teachers in their school.

The Tenure Act allows for a fourth probationary year for new teachers prior to granting tenure. It is not currently utilized often, but going forward HCPS plans on using the fourth year option significantly more often. This provides the benefit of having 3 years of student gains data upon which to make the tenure decision. Only new teachers who demonstrate top levels of performance and strong student gains will be granted tenure in their third year. A more robust tenure decision process will increase the likelihood that all tenured teachers will be effective.

**Figure 8: New HCPS teacher career ladder**

	Experience and performance-based career steps				Role-based career steps	
	Apprentice	Career	Advanced	Master	Mentor / Evaluator	Instructional Leader
<b>Qualifications / Performance level</b>	<ul style="list-style-type: none"> <li>Bachelor's degree and certification</li> <li>Ineffective or at risk in any category</li> </ul>	<ul style="list-style-type: none"> <li>Achievement of tenure</li> <li>Consistent rating of "3" on evaluation</li> </ul>	<ul style="list-style-type: none"> <li>Consistent rating of "4" on evaluation</li> <li>Two years in a row</li> </ul>	<ul style="list-style-type: none"> <li>Consistent rating of "5" on evaluation</li> <li>Two years in a row</li> </ul>	<ul style="list-style-type: none"> <li>Advanced or Master teachers</li> <li>Strong peer ratings</li> </ul>	<ul style="list-style-type: none"> <li>Consistent rating of "5"</li> <li>Strong performance as Mentor or Evaluator</li> <li>Expertise in curriculum dev., test analysis, or PD</li> </ul>
<b>Progression hurdles</b>	<ul style="list-style-type: none"> <li>Exit after 3 years if performance does not reach Level 3</li> </ul>	<ul style="list-style-type: none"> <li>Can remain in level for career</li> </ul>	<ul style="list-style-type: none"> <li>Drop to "Career" if performance falters for two years in a row</li> </ul>	<ul style="list-style-type: none"> <li>Drop if performance falters 2 years in row</li> </ul>	<ul style="list-style-type: none"> <li>Screened for mentoring / coaching capabilities</li> <li>Annual requalification</li> </ul>	<ul style="list-style-type: none"> <li>Screened for instructional leadership capabilities</li> <li>Annual requalification</li> </ul>
<b>Responsibilities</b>	<ul style="list-style-type: none"> <li>Develop knowledge and skills in instruction, curriculum and assessment</li> <li>Collaborate with colleagues in PLCs</li> </ul>	<ul style="list-style-type: none"> <li>Engage in continuous improvement</li> <li>Collaborate to construct benchmark lessons and assessments</li> <li>Team-teach</li> </ul>	<ul style="list-style-type: none"> <li>Similar to career teacher, with additional mentoring responsibilities</li> <li>Eligible to become Mentor / Evaluator</li> </ul>	<ul style="list-style-type: none"> <li>Similar to career teacher, with additional mentoring responsibilities</li> <li>Eligible to become Instructional Leader</li> </ul>	<ul style="list-style-type: none"> <li>Attend mentor / evaluator training</li> <li>Observe and provide peer assistance and coaching</li> <li>Work with principals to identify underperformers and assist in dismissal</li> </ul>	<ul style="list-style-type: none"> <li>Share instructional leadership role with admin</li> <li>Strong input into admin evaluation of teachers</li> <li>Analyze / use school and teacher/student data</li> <li>Monitor PLC effectiveness</li> <li>Provide demonstration lessons / team-teach</li> </ul>
<b>Compensation</b>	<ul style="list-style-type: none"> <li>Base salary schedule</li> </ul>	<ul style="list-style-type: none"> <li>Significant step change in salary</li> </ul>	<ul style="list-style-type: none"> <li>Significant step change in salary</li> </ul>	<ul style="list-style-type: none"> <li>Significant step change in salary</li> </ul>	<ul style="list-style-type: none"> <li>Lock into most recent total comp</li> <li>Additional \$2K</li> </ul>	<ul style="list-style-type: none"> <li>Lock into most recent total comp</li> <li>Additional \$4K in salary</li> </ul>
<b>Work days</b>	<ul style="list-style-type: none"> <li>Standard school calendar</li> </ul>	<ul style="list-style-type: none"> <li>Standard school calendar</li> </ul>	<ul style="list-style-type: none"> <li>Standard school calendar</li> </ul>	<ul style="list-style-type: none"> <li>Standard school calendar</li> </ul>	<ul style="list-style-type: none"> <li>10 additional days for training</li> </ul>	<ul style="list-style-type: none"> <li>20 additional days (spread into extra days or hours)</li> </ul>

### Plan of action

#### Key activities and execution milestones

##### Activity #1: Implementation of new career ladder.

- Milestone: Teachers placed on career ladder after receiving two evaluation scores from the new evaluation system in Fall 2013.
- Milestone: First Instructional Leaders named in June 2013.

#### Key outcomes

**Outcome #1:** Significantly more teachers will not be granted tenure until after their fourth year.

**Outcome #2:** Create Instructional Leader corps of 350 teachers (1-2 per school) and Mentor/Evaluator corps of ~200 teachers (~80 evaluators, ~120 mentors).

**Outcome #3:** Initial breakdown of teachers by performance steps will be 20% Apprentice, 40% Career, 30% Advanced, and 10% Master.

### **INITIATIVE 3: NEXT GENERATION PAY-FOR-PERFORMANCE**

#### **Motivation for Strategic Initiative**

The goals of the new teacher compensation plan are to ensure that we retain our finest teachers and to attract a whole new pool of talented professionals into the field. The new plan compensates teachers for their demonstrated performance, and as such will motivate them to continuously improve their teaching practice. HCPS believes that by rewarding and retaining our highest-performing teachers, we will achieve dramatic improvements in student performance.

HCPS has been a pioneer in the design and roll-out of pay-for-performance programs. Today, teachers in HCPS can already earn up to 50% of their base salary in additional supplements and bonuses. The bonuses, described below, were initiated several years ago and sought to compensate teachers based on performance, credentials, and for teaching in high-needs schools. Though only addressing a portion of a teacher's compensation, these efforts began shifting the culture of HCPS, and have built the foundation for teachers to embrace the new compensation plan that dramatically shifts the status quo.

- **Performance Pay Program** – A 5% district funded “bonus” to base pay for those tenured teachers / principals who both demonstrate superior performance in instruction via a portfolio and are recommended by their principal or supervisor.
- **Merit Award Program (MAP)** – This state program allows for a “bonus” of ~5% to those teachers and principals who meet two criteria: 1) a sufficient evaluation rating and 2) an effectiveness rating based on student achievement gains. All teachers and administrators are then compared and ranked within their grade level, teaching assignment, and school site type. The top ~25% of teachers receive the award.
- **Teacher Incentive Fund Grant** – Distributed to teachers in Title I schools based on the MAP calculation.
- **Teachers of Advanced Placement (AP) or International Baccalaureate (IB)** courses at the high schools are eligible for a “bonus” of \$50 for each student who scores a level 3, 4 or 5 on a College Board test.
- **National Board Certified Teachers** are provided with a bonus (~\$4000) each year for attaining this certification. In December 2008, 150 HCPS teachers earned NBC which brings the district's total of NBC teachers to 787, the highest in the state.
- The schools in the district with 90% or higher percentage of free/reduced lunch students are considered **Salary Differential** schools. Highly qualified teachers at these schools are given a 5% bonus and additional performance bonus awarded on the basis of school performance. NBC teachers at these schools received an additional \$4500.
- **Florida's A++ Accountability** system provides bonuses to schools that sustain high student performance or demonstrate substantial improvement in student performance. The award is currently \$85 per student. Last year, 127 HCPS schools earned the award.

The efforts to date have focused on adding incremental bonuses related to student learning, rather than fundamentally restructuring the way in which teachers are rewarded. The next generation pay-for-performance system will build performance-based pay into the salary schedule itself, and will address the following issues:

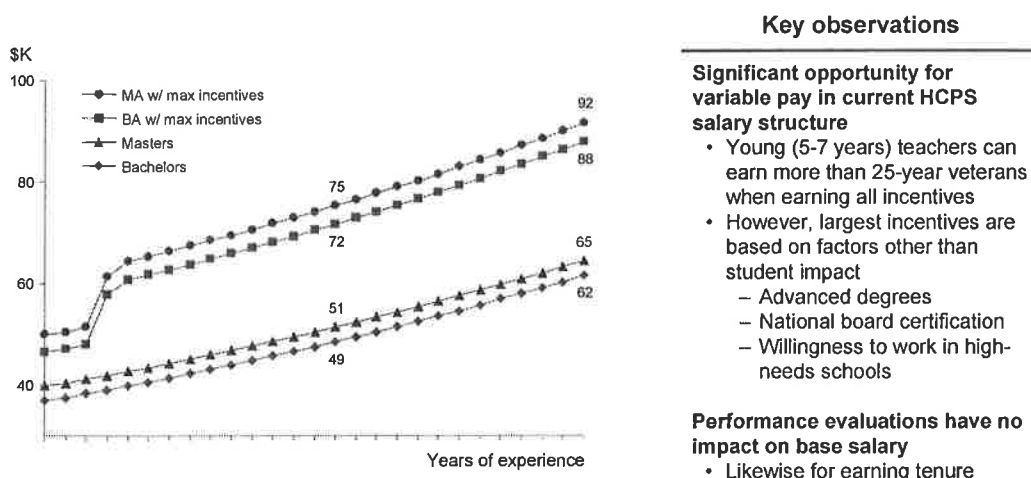
**Issue #1:** *The existing MAP program has not been popular, due to flawed measures of value-added and a cap on the number of teachers who could earn bonuses.* Teachers have objected to basing compensation decisions on annual learning gains, for which the sample size can be as low as 10-15 students. In addition, teachers would prefer an absolute standard of performance instead of the relative, zero-sum percentile rankings of MAP.

**Issue #2:** *Under the current salary schedule, the largest salary differentials are based on experience, inhibiting HCPS's ability to reward and retain young, exceptional teachers.* This pay structure rewards those who are able to remain in the profession as opposed to those who are truly effective with students.

**Issue #3:** *HCPS pays an advanced degree bonus in perpetuity (~4,500 teachers).* Teachers have a strong financial incentive to earn an advanced degree, although research has shown very little to no increased impact on student performance from such degrees.

**Issue #4:** *Performance has little impact on overall teacher compensation.* Today just 4% of the total compensation pool is tied to gains in student learning, through the MAP and TIF programs.

**Figure 9: HCPS's current salary schedule offers steady increases based on experience and attainment of an advanced degree, plus opportunities for incentive-based pay**



#### Description of Initiative

HCPS plans to transition from an experience and degree-based salary system to a salary system driven by demonstrated teacher performance. This revolutionary plan moves from previous efforts to cobble together a number of small performance-based incentives across the entire teaching corps to awarding substantial increases in compensation to teachers who have demonstrated student impact. The tight link from evaluation scores to performance levels and compensation helps reduce the complexity of the existing compensation system.

We will build on our experience to address flaws that harmed perceptions of the MAP system. Performance levels will be tied to a more valid and reliable 3-year average of student learning gains. Moreover, we will establish absolute standards of performance to which all teachers can aspire, rather than artificially capping the number of teachers who can attain additional

performance-based compensation. Observational evaluations of a teacher's instructional practices will also play a larger role in determining performance-based pay, as the training of school administrators and peer evaluators will enable them to more effectively differentiate performance.

The new salary plan will consist of an initial salary with large increases in salary tied to performance levels along the new career ladder. Additional role-based supplements will also be available for taking on leadership roles (Mentor/Evaluator, Instructional Leader). Evaluation scores, rather than experience, will drive compensation levels. Money that was previously used to pay for experience steps will now be used to reward teacher excellence based on student performance. Any cost of living adjustments will be applied to initial salary and salary steps.

To garner teacher support for this initiative, HCPS will offer existing teachers a choice between remaining on the old salary schedule or opting into the new compensation system. Existing teachers will have the opportunity to opt-in to the new plan at any point, but will not be able switch back to the old plan. Salary steps for each performance level on the new career ladder have been developed for the transition period while HCPS runs two salary schedules. These salary steps are based on estimated opt-in rates for existing teachers, expected performance levels for those teachers who opt-in, and the effects of removing under-performing teachers as a result of the new evaluation system. Under the new salary plan, the salary increments above the Apprentice base salary of ~\$37,000 will be as follows (Figure 10):

- Instructional Leader: \$17,000 (roughly equivalent to 23<sup>rd</sup>-year or step 20 teacher currently)
- Mentor/Evaluator: \$15,000 (roughly equivalent to 22<sup>nd</sup>-year or step 19 teacher currently)
- Master: \$13,000 (roughly equivalent to 21<sup>st</sup>-year or step 17 teacher currently)
- Advanced: \$8,000 (roughly equivalent to 13<sup>th</sup>-year or step 11 teacher currently)
- Career: \$5,000 (roughly equivalent to 11<sup>th</sup>-year or step 8 teacher currently)

**Figure 10: The new career ladder will be explicitly linked to the new salary structure**

Career ladder and performance levels	Criteria	Link to compensation
Instructional leader	<ul style="list-style-type: none"> <li>• Consistent rating of "5" and time as a mentor or evaluator</li> </ul>	<ul style="list-style-type: none"> <li>• Master level salary</li> <li>• Additional role supplement</li> </ul>
Mentor / evaluator	<ul style="list-style-type: none"> <li>• Consistent "4" or "5" performance</li> <li>• Willingness and selection for increased responsibility</li> </ul>	<ul style="list-style-type: none"> <li>• Master or advanced level salary</li> <li>• Additional role supplement</li> </ul>
Master	<ul style="list-style-type: none"> <li>• At least 2 straight "5s" on annual evaluations</li> </ul>	<ul style="list-style-type: none"> <li>• Master level salary</li> </ul>
Advanced	<ul style="list-style-type: none"> <li>• At least 2 straight "4s" on annual evaluations</li> </ul>	<ul style="list-style-type: none"> <li>• Advanced level salary</li> </ul>
Career	<ul style="list-style-type: none"> <li>• Tenured teacher</li> <li>• "3s" on annual evaluations</li> </ul>	<ul style="list-style-type: none"> <li>• Career level salary</li> </ul>
Apprentice	<ul style="list-style-type: none"> <li>• New teacher</li> <li>• Non-tenured teacher</li> </ul>	<ul style="list-style-type: none"> <li>• Apprentice level (initial) salary</li> </ul>

Two consecutive years of consistent performance at a higher performance level will be required for the additional performance step to be paid. Similarly, two consecutive years of negative

performance change will result in salary reduction. During that period of diminished performance, teachers will be paid at the prior performance level attained.

This new salary plan will allow higher performing teachers to earn a higher salary earlier in their career. These teachers are expected to opt in to the new plan. Existing teachers who perform at Level 3 (minimum performance level required of a career teacher) will prefer to stay on the existing salary plan and will be allowed to do so for the duration of their career.

**Tuition reimbursement for advanced degrees:** HCPS will offer a one time tuition reimbursement for advanced degrees in the sum of \$12,000. The reimbursement is based on the cost of attaining a master's degree at a Florida public university. Existing teachers who choose to opt in to the new salary plan and have earned their degree in the last four years will receive the reimbursement amount less any graduate degree salary supplements they have already been paid. Teachers who opt-in and earned their degree more than four years ago will not receive any tuition reimbursement as they have already earned advanced degree salary supplements that exceed the reimbursement amount. HCPS has elected to continue awarding some compensation to teachers for advanced degrees due to a strongly held belief that continual education is an important aim. Also, HCPS must be able to competitively recruit against surrounding districts, all of whom offer compensation for advanced degrees.

**Treatment of current performance-pay programs:** The funds for the current MAP and Performance Pay programs will be divided among teachers in the old and new salary plan based on the percent of teachers in either plan. This will ensure that existing teachers who do not opt in are kept whole in terms of annual potential total compensation. The MAP and performance pay program money allocated towards the new salary plan will be used to fund the performance salary steps and will not be used for annual performance bonuses. HCPS will work with the state to get a waiver allowing it to use the state funded MAP program dollars as described above.

**Transition from old to new salary schedule:** The district will increase the amount associated with the performance steps in the new salary plan over time with additional funding. As the teachers who do not opt in to the new system retire, more money will be transferred to the new salary plan. Any cost of living adjustments that are negotiated will apply to both salary plans. Any new grant funding for compensation will be disproportionately directed towards performance steps for teachers in the new salary plan vs. increased experience steps for the old salary plan.

In the first few years of the transition, there will be an increase to HCPS' current teacher salary budget from running a dual compensation system. HCPS has currently budgeted \$10M annually to ensure a smooth transition to the new compensation system. The additional funds needed are based on assumptions on the number of existing teachers who opt in to the new plan, the number of teachers who are dismissed from HCPS, and the distribution of evaluations for teachers on the new plan. To account for the uncertainty of these assumptions the \$10M was set aside as an ongoing cost for the district.

In the future, when all existing teachers who have opted to stay on the old salary plan retire and the district returns to having only one salary plan, the district projects the salary increments above the Apprentice base salary of ~\$37,000 will be roughly:

## Supporting Teachers to Accelerate Results for Students (STARS)

- Instructional Leader: \$28,000 (exceeds steps of current salary schedule)
- Mentor/Evaluator: \$26,000 (exceeds steps of current salary schedule)
- Master: \$24,000 (roughly equivalent to 30th-year or step 27 teacher on current salary schedule)
- Advanced: \$13,000 (roughly equivalent to 20<sup>th</sup>-year or step 17 teacher on current salary schedule)
- Career: \$6,300 (equivalent to 11<sup>th</sup>-year or step 9 teacher on current salary schedule)

In the future, when all teachers are on the new compensation system, HCPS expects that its compensation spend will shift from being 4% student performance related to 18% student performance related (not including high needs incentives that are performance based).

### Plan of Action

#### Key activities and execution milestones

*Activity #1:* Communicate the new career ladder and salary structure to all teachers.

- Milestone: 80% of teachers express through a survey that they are ready to begin the opt in period by July 2010.

*Activity #2:* Place new teachers on the new salary plan, and give existing teachers the opportunity to opt in to it.

*Activity #3:* Set initial salary step amounts once the number of existing teachers who opt in has been determined and the effective differentiation of teachers is demonstrated through the new evaluation system.

- Milestone: Salary steps for the new plan are determined based on the number of existing teachers who opt in to the new plan by September 2010.

*Activity #4:* All teachers will be assessed on the new evaluation system and all new teachers and existing teachers who opt in will be paid based on the new system.

- Milestone: Teacher evaluations are able to adequately differentiate teacher performance by Fall 2012.
- Milestone: All teachers on the new salary plan will receive a salary based on their evaluation by 2012 – 2013.

#### Key outcomes

*Outcome #1:* Approximately 10% of teachers are identified as master teachers.

*Outcome #2:* More than 30% of existing teachers opt in to the new salary plan.

## INITIATIVE 4: PROGRAMS AND INCENTIVES FOR HIGH-NEEDS STUDENTS

### Motivation for Initiative

Improving student outcomes at high-needs (low-performing, high-poverty) schools requires a four-prong approach: 1) strong leadership, 2) highly effective teachers, 3) incentives to attract highly effective teachers and 4) disproportionate investment in order to ensure that they have the human capital and resources necessary to succeed. Low-achieving students are not isolated to high poverty schools though. To combat low-achievement district-wide, high-needs initiatives also need to be expanded to the often overlooked low-achieving students at low-poverty schools.

HCPS already gives disproportionate accountability and resources to low-performing / high-needs schools. Principals are carefully selected by the Superintendent. They are supported in managing the teacher pool at their schools with Superintendent transfers of teachers out of the school. These schools receive additional staff development resources, personnel units if needed,



instructional materials and any instructional initiatives needed such as Saturday Academies, after school, or extended year services. Despite these activities, high-needs students still struggle.

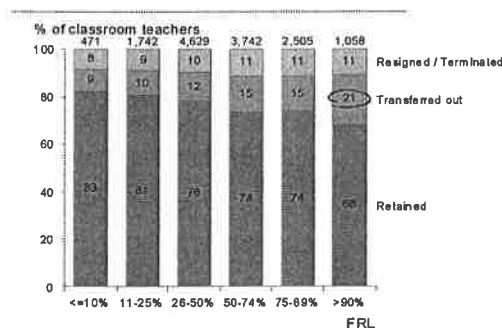
**Issue #1:** *Limited accountability for improving performance of highest need students.* Student achievement gains for the lowest quartile students are measured and monitored by principals, but no explicit accountability (with negative consequences) exists.

**Issue #2:** *Current teacher incentives are insufficient.* HCPS offers a package of incentives aimed at placing highly effective teachers in front of the highest needs students that includes both salary and performance bonus components.

- Salary Differential program: Teachers who work in or transfer to high-poverty schools receive a 5% salary increase and an annual performance bonus. In addition, National Board Certified (NBC) teachers receive an additional \$4,500 for serving in a high-needs school.
- Teacher Incentive Fund (TIF) bonuses: Teachers awarded performance pay under the MAP receive an additional performance bonus if they work in Title I schools.

These incentives have not been successful enough. While improvement has been made, high-needs schools have much higher teacher turnover versus low-poverty schools (Figure 11). A consequence of the high turnover rate is that a greater percentage of teachers in high-needs school have less than three years experience (Figure 12).

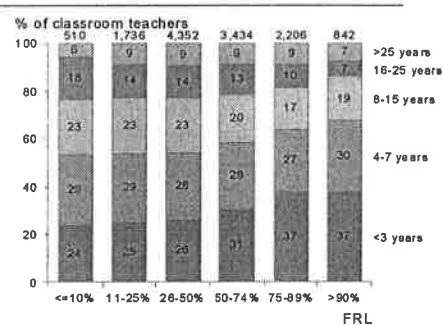
**Figure 11: Teacher turnover increases with student poverty level**



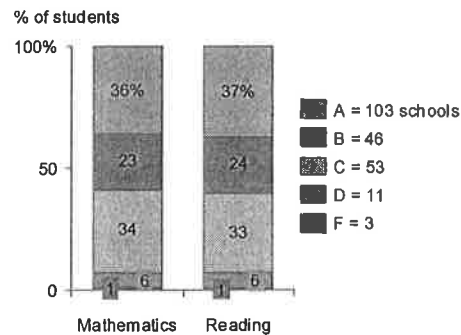
Many of Hillsborough's lowest achieving students are actually scattered throughout high performing schools (schools graded A and B by the state) with low levels of poverty (Figure 13).

**Issue #3:** *Limited pool of administrator and teacher talent with skill set suited for the high-needs environment from which to draw.* HCPS has difficulty in finding good talent to staff its high-needs schools. There are limited training and apprentice programs available to develop the skills needed to succeed in high-needs environments.

**Figure 12: High poverty schools have less experienced teachers**



**Figure 13: Distribution of FCAT Level 1 and 2 students by school grade**



### Description of Initiative

There are several elements we feel are critical to enhance our effectiveness with high-needs students and in high-needs schools. They are as follows:

#### *Serving High-needs Students*

**New incentive for teachers:** Focus groups and surveys of principals and teachers revealed concerns about effective teachers' willingness to move into the highest need classrooms due to diminished opportunity to earn existing performance bonuses. To reward teachers who succeed with high-needs students, HCPS is creating a new incentive that provides up to \$50 per Level 1 or 2 student making demonstrable achievement gains. Of the 60,000 level 1 and 2 students in HCPS, ~30% increase their achievement level each year. This results in an expected payout of approximately \$3.5M per year. HCPS will begin with a budget of \$4M and adjust the per-student incentive amount if the budget is exceeded.

**Accountability for principals:** The evaluation process to assess principal performance will be modified to reflect the need to significantly improve the performance of high-needs students. School leadership will have an explicit need to focus on the lowest performing students, as the weighting of this metric will be a full 10% of their evaluation. Principals will be less inclined to assign weak or inexperienced teachers the remedial students or to reward high-performing teachers with honors or AP/IB classes.

#### *Serving High-needs Schools*

**Expanding existing Salary Differential program:** The current high-needs program is only offered at 28 elementary and two middle schools, creating an unfair situation for teachers at high-needs high schools and other middle schools. This program will be expanded to include teachers at middle schools with greater than 75% FRL students and high schools with greater than 60% FRL students.

**Teacher residency program for high-needs schools:** Successful urban teacher residency programs have been established in Chicago, Denver, and Boston. The retention rate of graduates of these programs has approached 90% over five years, compared to ~50% for most high-needs schools. In the residency model, participants with high potential are recruited and matched with struggling schools. The candidates go through a full-year paid apprenticeship, working side-by-side with a master teacher in that school, while simultaneously taking graduate-level education classes. Master teachers receive a stipend of ~\$2,000 to work with the resident and therefore have a stronger incentive to work in a high-needs school. Upon completion of the program, participants earn a Master's degree, become full-time teachers, and commit to working in a high-needs school for at least three years.

A non-profit, the Urban Teacher Residency United (UTRU), will help Hillsborough create a residency program for up to 100 teachers a year. One hundred teachers per year is a small number, but a multiple year view, coupled with the power of high retention rates, makes this a powerful way to change the teaching dynamic of high-needs schools in the district. Existing residency programs have shown dramatic increases in student achievement because of their ability to recruit master teachers and the powerful effect of having a teacher and apprentice paired in many classrooms.

**Principal residency program for high-needs schools:** Similar to teacher residencies, we will develop and implement a high-needs principal residency program that includes training on instructional leadership, classroom management, recruiting and retaining effective teachers, and community engagement. Given New Leaders for New Schools (NLNS) is known for its principal residency program, HCPS has had discussions with them to provide assistance in designing a principal residency program. The relationship will either be an explicit partnership, consulting arrangement, or sharing of learnings that NLNS has developed over the last 9 years.

#### **Plan of Action**

##### **Key activities and execution milestones**

**Activity #1:** Design a salary differential program extension to middle and high schools that have high-needs populations and difficulty attracting highly effective teachers.

- Milestone: Salary Differential program expanded by June 2010.

**Activity #2:** Design, pilot, and launch a high-needs incentive program that rewards teachers for working with low-performing students in any school situation (January 2010 – September 2011).

- Milestone: Award of new high-needs performance bonuses by September 2011.

**Activity #3:** Partner with UTRU to design an urban teacher residency program. Develop guidelines and protocols for the apprenticeship model, create course plans for the academic portion of the residency, and recruit the first cohort of residents to pilot the program.

- Milestone: Pilot teacher residency program by August 2011.

**Activity #4:** Develop a principal residency program. Design the program with help from New Leaders for New Schools, recruit high potential principals and place them into schools.

- Milestone: Pilot principal leadership program by August 2012.

##### **Key outcomes**

**Outcome #1:** Increase the number of high-performing teachers at high-need schools (to be determined after baseline is established with new evaluation system).

**Outcome #2:** 80% retention rate for effective teachers at high-needs schools.

**Outcome #3:** 75% of non-proficient (FCAT Level 1 or 2) students will make annual learning gains in Reading.

**Outcome #4:** 80% of non-proficient (FCAT Level 1 or 2) students will make annual learning gains in Math.

#### **INITIATIVE 5: APPRENTICE TEACHER ACCELERATION PROGRAM**

##### **Motivation for Initiative**

In order to support new teachers and ensure that all students are taught by effective teachers, HCPS will create a virtuous cycle led by the on-boarding and induction of new teachers. By working intensively with new teachers to help them develop their craft, HCPS will create a more effective teacher corps which will lead to improved student performance. In addition, new teachers will feel more supported in their careers and remain in the district longer, limiting the number of new (and initially ineffective) teachers that are needed.

Rigorous mentoring combined with a thorough evaluation will also allow for better decisions pertaining to teachers who are underperforming. It will be much easier to identify the weaker teachers, document their performance and counsel them out of the profession. Some attrition among teachers is positive attrition, as not every new teacher is meant for the classroom. For this vision to become a reality, the district must address several issues pertaining to new teachers.

**Issue #1: High attrition among new teachers.** Of the teachers who started three years ago, only 68% are still in HCPS classrooms. Not only is the investment in those teachers lost, but additional new teachers need to be recruited to fill their place. Estimates range from \$15K - \$75K in terms of the cost of recruiting, hiring, training, and then losing a new teacher.

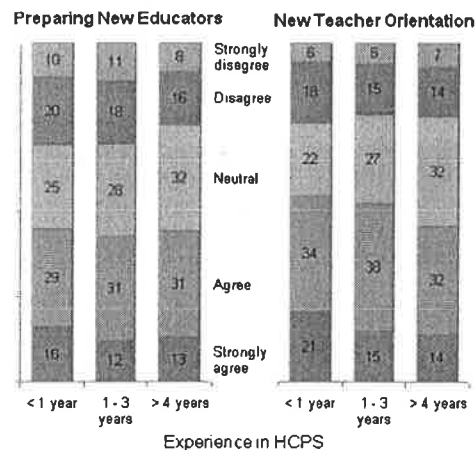
The 3 year attrition rate of 32% is a daunting figure, but it only tells part of the story. Attrition of weak teachers is beneficial to a school district. The new induction system will allow HCPS to differentiate between positive and negative attrition, helping to maximize the former and minimize the latter. The main purpose of the induction program is to support and train new teachers, but identifying ineffective teachers early to remove them is also important.

**Issue #2: Ineffective on-boarding programs.** The current induction process was developed to tackle the attrition problem, but it has had little effect. Two programs support new teachers, New Teacher Orientation (NTO) and Preparing New Educators (PNE). NTO is a four-day training held prior to the school year. A major emphasis of the training is classroom management, establishing high expectations, and effective lesson design. Following NTO, new teachers also complete additional days of subject content training, including a review of the specific Sunshine State Standards, pacing guides, resources and student assessments.

PNE provides support in the form of Peer Assistants who are veteran teachers trained in best practices of mentoring, observing and providing feedback to the new teachers. The Peer Assistant conducts formative assessments, provides the new teacher with feedback and assists in the development of action plans that address areas for improvement. The length of time in the program varies depending upon the skill level of the new teacher. New teachers must remain in the program for at least one cycle (three months), but can remain in the program for the timeframe of their temporary certificate. However, the vast majority of new teachers receive no focused, long-term mentoring.

Both NTO and PNE programs received mixed feedback from teachers and principals. The PNE program was singled out in focus groups as inconsistent (Figure 14). Principals stressed how difficult it is to oversee the program effectively (amongst many other responsibilities) and felt they were not overseeing it adequately. Principals often allow new teachers to finish their requirements after only one year because of the difficulty of overseeing the program. The lack of accountability limits the support new teachers receive even though they are still in a critical developmental period. In addition, new teachers often felt as though their peer was not particularly well-matched with them (grade / subject level).

**Figure 14: Survey results indicate that neither program was considered instrumental in “increasing teacher effectiveness”**



### Description of Initiative

Building from the experience of PNE, HCPS has decided to implement a more comprehensive model of induction. In order to provide intensive support to new teachers the district will move to a full-release mentoring model. Key elements of the district's new induction system include:

**Experienced and effective teachers serving as mentors:** Mentors will be primarily drawn from highly effective classroom teachers with five plus years experience for a two year rotation. This new role is one of the additional career advancement opportunities along the new career ladder. To minimize the impact of removing effective teachers from the classroom, the district will also source from effective retired teachers and/or teachers on leave with strong mentoring skills. Full-release mentors are essential to providing consistent support to new teachers. As the PNE program demonstrates, quality school-based mentoring is very difficult to control. Classroom-based mentors have too many other responsibilities in the classroom to focus on the development of new teachers. The rigorous application, selection, training, and evaluation of mentors will be the responsibility of the Staff Development department. In the first five years, HCPS will leverage New Teacher Center's (NTC) expertise with induction in developing internal capabilities.

**Extensive training for mentors:** Mentors will be given substantial amounts of training, including three weeks during the summer and 10 hours per month during the school year, to change current district culture around induction. Training on mentoring will be provided by the NTC and training on evaluation will be provided by Cambridge Education. They will be managed by mentor leads, who are responsible for ensuring high quality mentor-mentee interaction, providing ongoing support and evaluating mentor performance.

**Intensive one-on-one support:** The new teacher to mentor ratio will be 15:1 for first year teachers and 25:1 for second year teachers. Second year teachers who have demonstrated success in the classroom will receive less support allowing for a higher mentor / new teacher ratio. The mentors will ensure that each new teacher is getting the full support necessary to excel. They will meet with their mentees weekly for observation and debrief.

**Strong links to evaluation and professional development component:** Throughout the course of the year mentors will conduct formative evaluations and identify areas for improvement. Based on the action plans developed, mentors will direct new teachers to appropriate PD training to address their developmental needs. This ensures that the induction program will be linked to both professional development and evaluation. Mentors will also conduct end of year evaluations for new teachers that are not their mentees.

**Strong links to recruiting sources:** Feedback on the new teachers will be aggregated and shared with teacher training programs (universities and alternative certification programs) to help them improve their programs so that incoming teachers are better prepared.

### Plan of Action

#### Key activities and execution milestones

**Activity #1:** Design of induction program, with links to PD and evaluation data. External partner hired for five year program evaluation.

- Milestone: New teacher induction program design complete by February 2010.

**Activity #2:** Recruitment and selection of mentors, pairing of mentors to new teachers, mentor training and launch of pilot program.

- Milestone: Pilot group of mentors selected and trained by July 2010.

**Activity #3:** Rigorous program evaluation with fidelity checks and refinements.

- Milestone: Rigorous evaluation of induction program designed by March 2010.

**Activity #4:** Feedback from program evaluation incorporated, number of mentors needed adjusted based on number of new teachers, any new mentors selected and trained. Full roll out of program, all 1<sup>st</sup> and 2<sup>nd</sup> year teachers receive mentors.

- Milestone: All new 1st and 2nd year teachers receive mentoring by August 2011.

#### **Key outcomes**

**Outcome #1:** 80% of teachers participating in the induction program rate it highly effective by June 2013.

**Outcome #2:** 20% of teachers participating in induction program identified as ineffective and counseled out annually.

### **INITIATIVE 6: ENHANCED RECRUITMENT & DISMISSAL**

#### **Motivation for Initiative**

To manage the new evaluation system and the higher expectations for the dismissal of ineffective teachers, principals will need significant support from district Human Resources personnel. In addition, the district will seize the opportunity presented by the current economic situation and expected dismissals to replenish its teaching corps with the highest-quality candidates. This initiative will address the following issues with our current systems and processes:

**Issue #1:** *Principals are reluctant to dismiss teachers due to the onerous process.* The district's process to dismiss tenured teachers for performance-related issues is resource-intensive, requiring close coordination between principals, HR managers, and legal counsel. In focus groups with principals and teachers, many commented that principals were more inclined to move low-performing teachers to another school than to get involved in a dismissal process. Of the approximately 250 internal investigations of instructional personnel conducted last year, just 35 resulted in a recommendation to terminate. In a district with roughly 8,500 tenured teachers, this number is significantly below the suggested healthy turnover rate of 5%.

**Issue #2:** *Recruitment strategy is not optimized based on projected needs predicted measures of success, or analysis of characteristics of successful recruits.* In 2007-2008, the district mandated all attendees of its invitation-only recruiting fair to take the Haberman personality test, which is correlated with success in a high-needs environment. However, candidates are not sorted or ranked based on their results. Moreover, HCPS lacks the integrated data systems necessary to use the extensive amount of data it maintains on teachers to inform strategy. For instance, the district maintains detailed information on applicants but does not analyze it for common characteristics of successful recruits, which it could use to identify and target high potential recruiting pools.

#### **Description of Initiative**

**Create HR Business Partners role to support principals in building talent pool:** The district will create new positions with responsibility for ensuring that every school has a highly effective staff. Business partners will be dedicated to a group of schools based on grades and

geographical area, with three dedicated to elementary schools, one to middle schools, one to high schools and two serving schools across different levels. Business partners will:

1. Monitor and project a school's specific instructional needs, especially in key shortage areas.
2. Assist principals in finding high-quality candidates to meet needs, including screening candidates for subject-matter expertise.
3. Provide guidance, particularly for new principals, on the procedures to properly dismiss a teacher.
4. Once a dismissal proceeding is initiated, work with evaluators to compile necessary documentation and coordinate with managers of Personnel Services and Professional Standards departments to satisfy procedural requirements.

**Develop a more data-driven recruiting strategy:** The district will hire at least one additional recruiting resource whose main responsibility will be to build the systems and processes required to use data more effectively in recruiting the best candidates. The district will focus on the following two priorities:

1. Utilize data from new evaluation system to determine which candidate pools produce the most effective teachers, and realign recruiting strategy accordingly.
2. Build partnerships with feeder programs that train effective teachers; work with feeder programs to strengthen teacher preparation.

HCPS will enhance its IT system to enable this data analysis. The improved IT system will integrate employment application and subsequent teacher evaluation data. In addition, the system will provide access to on-line resumes and search capabilities to enable principals to differentiate applicants prior to interviews.

#### **Plan of Action**

##### **Key activities and execution milestones**

**Activity #1:** Develop job descriptions, recruit, hire, and train new recruiting resources.

- Milestone: Additional personnel hired and trained by March 2010, in advance of teacher interview days in mid-June.

**Activity #2:** Develop job descriptions, recruit, hire, and train new HR Business Partners.

Extensive communication provided to principals about role of new HR Business Partners.

- Milestone: Business partners hired and trained by May 2010.

**Activity #3:** Develop necessary IT enhancements to enable data-driven recruiting strategy. The district will work with Lawson to develop software modules that support the new personnel. Recruiting department designs and runs retrospective analyses of recruiting data to identify quality recruiting pools. Recruiting strategy is adjusted based on data insights.

- Milestone: Upgrades completed by April 2011.

**Activity #4:** Analyze current HR processes to identify areas for improved efficiency and determine potential resource reallocations in order to sustain newly created recruiting and HR roles.

- Milestone: Assessment with recommendations completed by June 2010.
- Milestone: Processes reengineered and personnel reallocated by January 2011.

**Key outcomes**

**Outcome #1:** Meeting of dismissal targets outlined in Strategic Initiative 1.

**Outcome #2:** Meeting of recruiting needs resulting from increased number of dismissals outlined in Strategic Initiative 1.

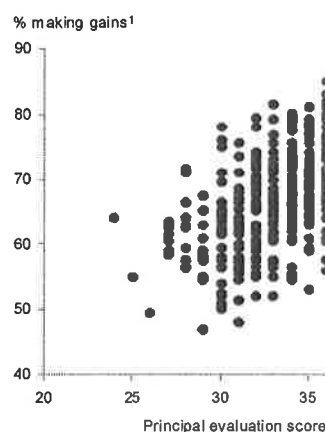
**INITIATIVE 7: STRENGTHEN SCHOOL LEADERSHIP****Motivation for Initiative**

Research has shown that strong leadership is a prerequisite to major gains in school-wide achievement. Teachers are willing to follow good leaders to new or difficult schools and consistently rank school-based leadership as critical to their effectiveness. With chief responsibility for the hiring, evaluation, development, and dismissal of teachers, principals play a critical role in improving teacher effectiveness. As such, principal evaluation and compensation must be aligned with the district's 5-year strategic priorities and objectives.

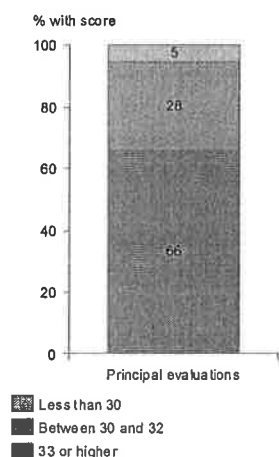
The following issues currently limit the district's ability to ensure that every school has a leader focused on enhancing teacher effectiveness:

**Issue #1:** *Lack of correlation between evaluation scores and student outcomes* (Figure 15). Each area of the evaluation (instructional, operational, and school leadership) is given identical weight, which fails to emphasize student achievement. Leadership components critical to the development and support of effective instruction are also not identified or gauged.

**Figure 15: Principal evaluation scores are only weakly correlated to school-wide student gains**



**Figure 16: Principal evaluation scores show similar positive bias found in teacher evaluation scores**



**Issue #2:** *Limited objectivity in assigning evaluation scores* (Figure 16). Area Directors (AD) are given guidelines for evaluating principals against objective data (e.g., FCAT scores should inform the instructional leadership rating), but the guidelines lack benchmarks or standards. This leads to a highly subjective and positively biased evaluation system, in which 2/3 of principals received an evaluation score of 33 or above (out of 36).

**Issue #3:** *Instrument and process do not aid in professional development of principals.* The current instrument does not require ADs to identify key developmental needs nor does it help to identify which principals are suited to take on the challenge of high-needs schools. Principals



also do not know which metrics or elements were used to determine their overall scores, and thus have little insight into their areas for development.

#### Description of Initiative

Through the design of a researched-based evaluation tool and a compensation system geared toward results, principal evaluation and compensation will be aligned with both the new system for teachers and the district's objectives. Key elements of the new system will include:

**Redesigned evaluation instrument:** To evaluate principals, HCPS will use VAL-Ed, a research-based instrument developed by Vanderbilt University and aligned with the Interstate School Leaders Licensure Consortium standards for principal effectiveness. The results of VAL-Ed are displayed across both core components and key processes and allows for principals and their ADs to immediately diagnose problem areas and address them. With this tool:

- Principal, teachers, and AD provide a 360°, evidenced-based assessment of leadership behaviors. AD input will have the heaviest weighting.
- Respondents rate effectiveness of 72 behaviors on a 5-point scale, along with listing the sources of evidence on which the effectiveness is rated
- Growth can be measured over time
- Principals are rated against both absolute standards of performance and relative to peers

**Evaluation against standardized performance benchmarks:** While ADs will continue to bear primary responsibility for evaluating principal performance through the VAL-Ed tool, performance against a set of objective metrics will also compose a significant percentage of the evaluation (Figure 17).

**Figure 17: Principal evaluation score will have seven components, a mix of student gains and other management responsibilities**

Evaluation component	% allocated
Percent of students making learning gains	30%
Percent of Level 1 and 2 students making learning gains	10%
VAL-Ed principal evaluation system	30%
School operations – finances and facilities	10%
Student and teacher attendance / discipline	10%
Teacher retention	5%
Principal evaluation of teachers (correlation with student gains)	5%

*is this happening?*

Given principals' bottom-line accountability for student performance, it is critical that student learning gains factor heavily in their evaluation. It is also critical that we focus principals on the performance of their highest-needs students, and provide appropriate incentives to influence their staffing and scheduling decisions. This will be accomplished through two key metrics:

- **Percent of all students making gains**
  - Improvement over previous year's results will also be considered.
  - This metric will include the student gains for all teachers to whom the principal has granted tenure in the past 10 years, in order to hold principals accountable for this

critical decision. However, these gains will be weighted less than teachers currently being managed by the principal.

- New principals will be granted a one year exception from this requirement.
- **Percent of Level 1 and 2 students making gains**
  - Improvement over previous year's results will also be considered

**Training and professional development:** To change the evaluation culture, school and district administrators will be extensively trained on the new evaluation system and evaluation scores will be calibrated across ADs. ADs will be responsible for providing support and feedback on principal improvement. Three areas for improvement will be singled out by the AD, and the principal will be expected to devise a strategy on how to address those issues. Struggling principals will be assisted in identifying positions in the district that would be a better fit.

**Performance-based compensation:** Performance pay will be tied to the new evaluation system, with highest performing principals and assistant principals (AP) receiving a 5% annual bonus (7.5% for principals and APs at high-needs schools<sup>1</sup>). HCPS is dedicated to raising administrator base salaries to be competitive. Adding an additional incentive pay component to principal performance will increase administrator compensation, which has fallen behind surrounding counties by a significant margin and has resulted in several administrators moving to other districts in the past two years. Currently principals have two performance-pay opportunities, the MAP and Pay-for-Performance programs. The current pay-for-performance (subjectively awarded by ADs based on principal performance) dollars will be repurposed to fund the new bonus.

#### **Plan of action**

##### **Key activities and execution milestones**

**Activity #1:** Design appropriate metrics to be used in the principal evaluation. Each metric should be designed with appropriate benchmarks for each type of school.

- Milestone: Redesign complete by June 2010.

**Activity #2:** Train area directors, principals and APs on the new evaluation system and the links to performance bonuses.

- Milestone: Training of key personnel completed by July 2010.

**Activity #3:** Pilot of new evaluation system. Two of the district's seven areas will participate. Refinements will be made based on AD and principal feedback on objectivity, accuracy, and ease of use of the new system.

- Milestone: Pilot completed by June 2011.

**Activity #4:** Full roll out of the new system for all principals. Performance pay bonuses made available to high-performing principals.

- Milestone: All principals evaluated under new system by August 2012.

**Activity #5:** Evaluate APs under new system one year after all principals are evaluated through the new system.

- Milestone: All APs evaluated under new system by August 2012.

##### **Key outcomes**

**Outcome #1:** At least 80% of principals (at high- and low-needs schools) are evaluated as highly effective by the end of the 2014 school year.

<sup>1</sup> High-needs is defined as >90% FRL for elementary, >75% for middle, and >60% for high schools

**Outcome #2:** At least 80% of APs (at high and low-need schools) are evaluated as highly effective by the end of the 2014 school year.

## **INITIATIVE 8: PERFORMANCE MANAGEMENT**

### **Motivation for Initiative**

To focus both district personnel and the broader community on the district's 5-year goals, the metrics and tools the district uses to manage district- and school-wide performance must be aligned with the outcomes we aim to achieve. In addition, we must supply principals and teachers with the data and tools they need to manage performance on a day-to-day basis.

Through Project STARS, the district aims to redesign the district's performance management system by developing new district- and school-level scorecards that track progress against the district's chief objectives. In addition, HCPS will simplify the use of data through data dashboards, which will supply day-to-day information on both teacher and student performance such that principals and teachers can easily diagnose issues and develop solutions. Administrators and teachers will be trained on how to use the data-dashboard effectively. In addition, in order to ensure that administrators can manage the performance of every teacher, and that value-added can be assessed for every teacher, HCPS must revise or replace its district-developed beginning- and end-of-course exams in subjects not tested through the FCAT system. To support best-in-class teacher PD a new system will enable the automated identification of professional development needs and opportunities based on a teacher's evaluation and student performance results. These initiatives will address the following shortcomings:

**Issue #1:** *Student performance data are not presented simply or in a timely manner to the people who need to use them to make decisions.* Administrators and teachers must switch between multiple systems and queries in order to develop a holistic view of school or student performance.

**Issue #2:** *Some key student indicators are not tracked.* Certain indicators of postsecondary readiness, such as 9<sup>th</sup> grade off-track indicators or student progress toward proficiency, are either not tracked or reported adequately.

**Issue #3:** *Inadequate information provided to key stakeholders (parents, students community members).* Aside from required school reports through Florida's accountability system, HCPS does not provide community stakeholders with information on the relevant performance of district schools.

**Issue #4:** *Inadequate training on using data to improve instructional practice.* Teachers do not feel adequately trained on how to incorporate student performance data in their approach to lesson planning and differentiated instruction.

**Issue #5:** *Unclear psychometrics undermine the usefulness of beginning- and end-of-course exams.* District-developed assessments on the whole have not been subjected to rigorous field-testing to ensure validity, especially for purposes of assessing student learning gains.

**Issue #6:** *Lack of clear direction provided to principals and teachers on trainings available to address specific developmental needs.* Principals and teachers alike have difficulty identifying

specific professional development opportunities within the vast HCPS PD course offering based on their identified areas or student needs.

### Description of Strategic Initiatives

**Develop customized district- and school-level performance scorecards:** Customized scorecards will focus the district and schools on the essential goals and outcomes the district seeks. They will rationalize the various performance data required by Florida's A++ accountability and federal No Child Left Behind standards, along with other key metrics, into a more coherent set of standardized metrics for everyone to track and to measure progress against. See Figure 18 for an example of the potential design of the district's school scorecards and the kinds of data they might include.

**Figure 18: An example of what a scorecard may look like and potential data to include**

Sam P. Le High School  
SCHOOL PERFORMANCE SCORECARD

Category	Subcategory	Target	Actual	Score	Comments
Graduation	Four year graduation rate	85%	82%	95%	Below target
	On track for graduation	85%	82%	95%	Below target
	College/workforce ready	85%	82%	95%	Below target
	Achievement	85%	82%	95%	Below target
College/workforce ready and achievement	% of grads in post-secondary education and/or employed	85%	82%	95%	Below target
	SAT / ACT: participation, average score, % of students with college-ready score	85%	82%	95%	Below target
	FCAT: % proficient / growth on all tests	85%	82%	95%	Below target
	AP: % students passing at least one test	85%	82%	95%	Below target
On track	% of freshmen on track for graduation	85%	82%	95%	Below target
	Quality instruction exposure	85%	82%	95%	Below target
	% of students missing >= 'x' days	85%	82%	95%	Below target
	Average days absent per teacher	85%	82%	95%	Below target
Learning environment	Extra-curricular participation	85%	82%	95%	Below target
	Parent satisfaction with school academics and environment (survey metric), parent survey completion rate	85%	82%	95%	Below target
	Student and teacher data	85%	82%	95%	Below target
	Parent and community involvement	85%	82%	95%	Below target

Potential scorecard categories include the following items among others:

#### Graduation

- Four year graduation rate

#### College / workforce ready and achievement

- % of grads in post-secondary education and/or employed
- SAT / ACT: participation, average score, % of students with college-ready score
- FCAT: % proficient / growth on all tests
- AP: % students passing at least one test

#### On track

- % of freshmen on track for graduation

#### Quality instruction exposure

- % of students missing >= 'x' days
- Average days absent per teacher

#### Learning environment

- Extra-curricular participation
- Parent satisfaction with school academics and environment (survey metric), parent survey completion rate

*Is this in place?*

**Develop real-time data dashboards for principals and teachers:** At the teacher level, the dashboard will combine student performance results with attendance, discipline, on-track indicators, and student demographic information to provide teachers with a more complete view of their students' performance. In a simplified one page view, teachers will see how different subgroups of students are performing relative to each other, to the school and to other schools with similar students. If there are any issues in the class, the one-page dashboard will identify them.

Principals will be able to access each teacher's dashboard, but they will also have access to their own school-wide dashboard in order to manage school performance. Data on teacher performance by student subgroup will be provided along with discipline and attendance statistics, classroom observation information, student on-track indicators, and other school-wide information to help a principal better monitor student and teacher performance. The dashboard will provide comparisons relative to similar schools and the district as a whole.

Many elements to be used in the data-dashboard are stored electronically, but in different locations. Student and teacher data are currently housed in over 10 different systems that have a

limited capacity to communicate with each other. Through this initiative, HCPS will migrate all data storage into a single easily accessible location. The data warehouse system will be capable of integrating existing longitudinal district and state data for students, teachers, and principals into a single, secure, user-friendly interface that allows varying levels of access based on individuals' position in the district.

**Training on the use of data to inform instructional strategies:** Along with data availability, training in the use of data is needed in order for teachers to use data to guide instruction. As part of its plan, HCPS has identified an online course, *Datawise*, offered through an arm of the Harvard Graduate School of Education, as a needed addition to current strategies toward improving the understanding and use of data. The five-year plan is to educate teams of key district and school personnel who would become trainers for HCPS teachers and staff.

**Improving the district's assessment system:** There must be an increase in the capacity of the district to revise, refine, and expand course exams for all subjects. Also, since value-added measures will be incorporated into teacher evaluation scores and salary determination in the future, it is critically important to have robust and valid pre- and post-tests. While examinations in the core courses generally have good psychometrics, the majority of the exams in the non-core courses have never been reviewed and have less than optimal reliability.

In order to accomplish this task, the district will convene a committee to analyze currently available assessments and pinpoint deficiencies. Once this is done, the district will either purchase needed assessments from appropriate vendors or will contract with content experts to develop such assessments. This will allow the district to ensure assessments are standards-based and include an opportunity for field testing, eliminating current validity and reliability issues.

To implement the new assessments, HCPS has recognized the need for better assessment technology. HCPS will fund the installation of computer labs in every school where students will take assessment tests – eventually even state FCAT – online. This will allow disaggregated assessment results to be rapidly available to teachers, principals, and district personnel for real-time classroom use.

**Prescriptive professional development:** Once teachers have the data they need and the training to understand what they are seeing, they need help with how to alter their instruction based on their students' achievement results. To solve that, HCPS will develop a first of its kind *prescriptive* system that directly ties together teachers' professional development regimen with their students' performance. The goal is to create a system that suggests and/or requires professional development based upon identified key indicators. For example, a teacher who has written excessive discipline referrals and has been observed to lack good classroom management might be required to complete a classroom management training.

#### Plan of Action

##### **Key activities and execution milestones**

**Activity #1:** Develop and update new assessments.

- Milestone: All pre and post tests are upgraded or certified by a HCPS team by June 2011.

**Activity #2:** Identify essential data that must be available to users for dashboards and scorecards.

- Milestone: Data elements to be used in scorecards and dashboards are identified by June 2010.
- Milestone: Scorecards released by August 2010.

**Activity #3:** Develop prescriptive professional development system aligned with evaluation data.

- Milestone: Staff development courses are mapped to the new teacher evaluation rubric by January 2011.

**Activity #4:** Data storage upgrade and consolidation of all relevant data elements into one centralized system.

- Milestone: Data storage is upgraded to capture all elements needed for dashboards and scorecards by June 2011.

**Activity #5:** Pilot the use of a simplified data dashboard in ~30 schools; integrate feedback and make modifications.

**Activity #6:** Improve the use of data-driven decision making in the district by presenting multiple data elements in an easy to use format.

- Milestone: All teachers and principals have a simplified data dashboard to be used for classroom and school level decision making by June 2012.

**Activity #7:** Training in data usage through *Datawise*.

- Milestone: 90% of teachers participate in *Datawise* online training.

**Key outcomes:**

**Outcome #1:** 80% of teachers will self-report that they use data effectively to modify classroom instruction by June 2012.

**Outcome #2:** 80% of teachers will report that they believe value-added assessment system is an accurate gauge of teacher performance by Fall 2011.

## INITIATIVE 9: INTEGRATED INSTRUCTIONAL TOOLKIT

### Motivation for Initiative

Critical to the success of our plan will be an overhaul of the instructional tools the district makes available to teachers. Instructional tools, such as high-quality curricula, model lesson plans, and pacing guides, enable teachers to align their day-to-day instruction with a set of common goals. They also ensure that teachers are able to access and leverage best practices in instruction, rather than each teacher creating from scratch. The district envisions utilizing technology to create a more holistic curriculum planning tool that provides, in a highly efficient and integrated fashion, an electronic portal of lesson plans and teaching resources aligned with Next Generation Sunshine State Standards and based on best instructional practice. Providing teachers with curriculum tools will streamline planning time, a limited resource, and enhance classroom instruction.

In addition to equipping teachers with the appropriate tools for teaching, student assessment is a valuable tool to enable effective instruction. The process of teaching and learning in its most simple form involves diagnosis of student knowledge, instruction and then assessment of learning. Continuous assessment is integral to successfully impacting student learning.

**Issue #1:** *Robust curriculum supports not available in all subject areas and grade levels.* In order to be an effective teacher, it is important that educators have access to the resources and tools they need to do their job. Without these resources and tools, teachers lack support in their

ability to help students achieve. Currently, the district does not adequately prepare its teachers to deliver instruction that will enable students to show progress towards meeting state standards.

Most curriculum content areas merely provide a list of references of suggested teaching strategies within their curriculum guides and none of these are explicitly linked to standards and benchmarks. Some additional support and preparation for teachers in English and Math exist in the district's recent implementation of the College Board's SpringBoard program. For example, math teachers assigned Algebra I are provided with a rich and detailed pacing guide to ensure teachers across the district cover required course content and accurately assess student learning. Overall, however, ~20 percent of high school and ~60 percent of middle school content areas provide additional instructional support such as lesson plan banks to complement curriculum guides. In all cases, lesson plan banks lack uniformity, ease of navigation, and effective search functions. In reality, they are merely lesson plan collections.

**Issue #2:** *Formative assessment data to diagnose student learning not user-friendly.* HCPS has developed formative assessments in most core subject areas and grade levels linked to state standards. Teachers are able to see how each student performed on each strand, but additional time and analysis would be required to draw out patterns and key takeaways, precious time that teachers do not have. A user-friendly interface does not exist that presents the student results with a quick summary of concepts that have been learned, concepts that have not been grasped and links to the instructional tools mentioned above to address the weaknesses found.

**Issue #3:** *Limited sustained professional development in curriculum content areas.* In order to make the most effective use of the newly developed instructional tools, teachers must be able to access high-quality PD focused on these tools. Specific weaknesses to address include:

- No content curriculum areas have developed best practice distance learning trainings, enabling teachers to receive just in time support
- Current PD system does not allow teachers to search offerings tied to specific state standards. This makes the system less effective in providing targeted assistance to teachers seeking to improve specific skills
- Lack of accountability, with little to no follow-up after training is provided to ensure that best practices are implemented in the classroom

#### Description of Initiative

**Development of model lesson plans and pacing guides for all subjects accessed through an electronic portal:** Curriculum teams will first create, revise, or purchase (from appropriate vendors) a full complement of benchmarked instructional resources that are tied to state standards. This will include curriculum guides reflecting Next Generation Sunshine State Standards, rich pacing guides, and lesson plans in all subject areas. Lesson plans will include Exceptional Student Education (ESE) access points, suggested teaching strategies, and allow teachers flexibility in adapting lessons to differentiate instruction for ability level and learning style. This will ensure that the individual needs of each student are met.

These resources will be organized into content area lesson plan banks. They will be designed to be user friendly and allow filtering and searching of lessons based on characteristics such as student need, learning style, benchmark, topic, and teaching strategy. Curriculum teams will

further ensure that existing banks are vetted and updated to be incorporated into the new bank format to maintain consistency and quality.

HCPS curriculum supervisors envision establishing and communicating curriculum with teachers in a way that is innovative and reflects 21<sup>st</sup> century skills and technologies that will enhance student performance and college readiness. Thus, as the lesson plan banks are constructed, the district will build and launch an electronic portal to serve as a gateway to all previously described resources. To optimize the utility of the portal, every component will be downloadable and adaptable for use by individual classroom teachers to meet their students' unique needs.

Additional resources will address differentiated instruction, strategies to improve student achievement, learner profile support that accounts for variable learning styles, model lessons via podcasts and online streaming video of exemplary classroom instruction, and practice exams. To facilitate the interactive nature of the portal, resources such as blogs, wikis, templates, and discussion boards will allow teachers to contribute to the portal and post their comments and ideas about the content. This will encourage the formation of a cross-curricular virtual learning community. The improved communication venue for interdisciplinary collaboration and sharing of best practice will increase the probability that an effective curriculum is delivered. Once these pieces are in place, the portal will also incorporate an area for parent and student access, with course information, study guides, and practice course exams.

**More robust teacher-friendly formative assessments:** The district will invest in a vendor developed assessment tool (such as ThinkLink Learning's Predictive Assessment Series) which assesses student progress toward meeting state standards for reading/language arts, math, science, and social studies. HCPS has been running a ThinkLink pilot in a few schools and teacher response has been very positive on its user-friendly interface, ease with which data can be analyzed and interpreted and guidance on improving teaching practice. The curriculum and instruction team will conduct a thorough review of products in the marketplace and make their selection based on the dimensions that are important to teachers.

**Professional development:** HCPS will develop training modules and provide peer support for the new curriculum tools and formative assessment package. To best suit teacher needs, the training format will include distance learning modules, face-to-face training and follow-up peer coaching. Peer coaches, a newly created role, will be deployed to school sites to build relationships with teachers and provide support in advancing content knowledge and pedagogical practices. Each coach will work with ~30 schools to conduct larger group trainings, small group sessions with PLCs and departments as well as one-on-one coaching for teachers who need extra support.

#### **Plan of Action**

##### **Key activities and execution milestones**

**Activity #1:** Design and/or collect existing instructional resources for FCAT and non-FCAT tested content areas. Leverage curriculum supervisors, vetted teacher generated content and supplemented with 3<sup>rd</sup>-party materials.

- Milestone: Purchase and develop bulk of instructional materials by June 2012 and all materials by June 2014.

**Activity #2:** Revise and strengthen curriculum guides for FCAT and non-FCAT tested content areas.



- Milestone: Revise the curriculum guides in most content areas to reflect the Next Generation Sunshine State Standards by June 2012 and all areas by June 2014.

**Activity #3:** Create electronic portal, test for functionality and usability, refine based on feedback and launch.

- Milestone: Most content loaded into the portal by August 2012 and all content by August 2014.

**Activity #4:** Provide training to teachers on new tools, portal and assessment package on an ongoing basis starting August 2010.

- Milestone: Content area supervisors and curriculum teams will finish first phase of training development by June 2010.

#### **Key outcomes**

**Outcome #1:** 80% of teachers contribute/utilize new instructional tools and portal.

**Outcome #2:** 100% of teachers utilize formative assessment package to improve instruction.

**Outcome #3:** 100% of teachers trained on new instructional and assessment tools.

### **INITIATIVE 10: CHANGE MANAGEMENT / COMMUNICATIONS**

#### **Motivation for Initiative**

Major projects need stakeholder support to be successful. Dramatic, large scale organizational changes need equally dramatic change management and communication plans to ensure project success. The district's detailed plan for community engagement, with plans tailored to each stakeholder audience, will build community support for these changes and help ensure project success. The communication plan will 1) introduce initiative objectives to all employees and community members, 2) explain the importance / relevance of the initiative in detail, 3) cultivate institutional and community support, 4) seek input, and 5) keep employees and the public informed at key stages in the process.

The change management / communication plan will build from the collaborative proposal design process and engage community members in the dramatic changes that will happen in HCPS. Stakeholders, especially teachers, were actively involved in the proposal design process. Focus groups were conducted with 13 different groups of teachers and principals to seek feedback on design elements or proposed initiatives. A survey was also sent to teachers, principals, and assistant principals to gauge interest in a variety of ideas with high response rates (~50% for teachers and higher for administration).

HCPS aims to initiate a large scale change management plan to maintain the collaborative spirit of the proposal design. Successful implementation of the project will take many different stakeholders working together. Communicating the vision and the goals of the project will be instrumental to keeping different stakeholder groups aligned and limiting miscommunication. Effectively execution of the plan will lead to smooth implementation and project sustainability.

HCPS has an undersized communications team. The office manages all internal and external communications, including the district's website and email. As effective communication has become more of a priority for the school district, the communications staff has taken on additional responsibilities, including crisis management, all with few staff members.

**Issue #1:** *Undermanned communications staff does not have sufficient bandwidth required for such a large scale project.* The HCPS communication team is not large enough to run the change management initiative for a 192,000 student district.

**Issue #2:** *A project of this scale, will have Increased visibility and require an extra deliberate communications plan.* HCPS will get significant publicity because of the size and nature of this grant and will have to operate under an increased level of scrutiny.

#### Description of Initiative

**Identification of the key internal and external audiences to target:** The communication plan will target both internal and external audiences, and will focus on key partners to ensure success.

- **Internal** – The primary focus will be on internal communication. The primary audience is the employees of HCPS, especially the teachers and principals who are most affected by the initiative. =

Teachers and principals are active, vocal and well respected community members. Effective internal communication is crucial to gaining community support. Principals and teachers will act as informal spokespeople, so every effort must be taken to ensure internal alignment.

- **External** – Parents will be the main focus, informing them of the relevance and importance of the project to public education in HCPS. Other external audiences will include business leaders, churches, local government and university officials, and state lawmakers.
- **Media** – HCPS will coordinate the majority of internal and external communication directly. Print media will be the target audience, but communications will not be limited to local newspapers. Messages will be scheduled and tailored with the specific medium in mind, whether local daily newspapers, national newspapers or journals, magazines, television, or radio.

#### Methods of contacting and communicating with key audiences:

- Multiple brief communications that provide information on new initiatives and milestones, as well as regular reminders about the importance and relevance of achieving the goals identified in the grant.
  - Monthly pulse checks through web-surveys will be used to gauge teacher and principal engagement and to provide updates on project developments.
  - An "Ask MaryEllen" email box will be set up with a commitment to giving a personal response to all internal questions or concerns.
- More lengthy communications that explain in greater detail the grant objectives, the research/reasoning behind the initiatives, specific strategies employed, and progress to date. Employees and members of the public will receive frequent reminders and invitations to view the detailed communications or to participate in meetings and other vehicles for seeking input. Employees directly affected by the proposals will receive communication that is both personalized and highly detailed.
  - These will include "town-hall" meetings where internal and external stakeholders can come together to ask questions about the various initiatives.

- Frequent and consistent communication will be utilized, so that employees get the news directly from the district with one voice across multiple channels (web sites, email, newspapers, television, school newsletters, telephone, or word of mouth).
  - Importantly, HCPS will issue press releases to the media whenever an opportunity to share successes presents itself. These releases will not be limited to pre-arranged communication times, and will be circulated through all district channels.
- Interaction is essential to building community support and will be achieved through the activities mentioned above.

**Partners to help reach key audiences:** To bolster its capabilities, HCPS will partner with a national communications consulting firm to develop a change management plan, for example Hill and Knowlton. During project implementation, the firm will design all materials necessary for communications with district input, conduct all focus groups and surveys, and assist in developing specific message strategies.

**Partners in Reaching Audiences:**

All partners in communicating to internal and external audiences will receive up-to-date information, fast-facts, illustrative anecdotes, a grasp of the research supporting the initiative, and talking points on a regular basis.

*District Governance*

- District leadership, including the School Board, Superintendent, and key district personnel will participate in specific communications and leadership training opportunities aimed at understanding the initiatives and delivering a consistent message to all stakeholders. These trainings will take the form of off-site workshops and regular on-site board workshops. Cross-training of district and Union leadership will occur to ensure common, consistent messages from both governing parties.

*Union Leadership*

- Union support is key to the success of the entire initiative and must be highly visible at all times. When district officials speak about the plan in public, they will be accompanied by a Union official or invoke the names of Union officials. When possible, letters and memos will be signed by district and Union officials together. Union leadership will participate in communication trainings so that they can effectively respond to and influence their teacher constituents. All training will be conducted with the assistance of private consultants and experts in the field identified by the Gates Foundation through this project.

*Principals*

- Principals will be a valuable communications asset as the district attempts to publicize the initiative and build support. A large part of the communications effort will involve preparing principals to talk to teachers, parents, community organizations, and media about the plan.
- HCPS will conduct small group sessions with principals to learn what they believe they need to effectively communicate the plan and answer questions from all stakeholders. Brochures, community townhall meetings or other communication tools will be developed for principals, based on their requests and understanding of the local community.

*Community leaders*

- A group of 5 to 10 community leaders will be designated to speak publicly about the project. They will be called upon to accompany the Superintendent or Board members as they discuss the plan with community groups, local media, editorial boards, etc.
- The community leaders will include business leaders, educators (retired K-12 and university officials), elected officials, and sports figures.

**Plan of Action**

**Key activities and execution milestones**

*5#6 Ready? where are surveys?*  
*5#7 Again, where?*  
**Activity #1:** Survey teacher and principal for awareness, understanding, and receptiveness to the grant and the initiatives. An initial baseline survey will help determine growth targets for staff awareness.

- Milestone: All teachers will be surveyed quarterly on their awareness, understanding, and receptiveness to the new initiatives starting in September 2009.

**Activity #2:** Surveys of the general public along awareness and general receptiveness will be completed during the first 2 years of the project.

- Milestone: The general public, both parents and non-parents, will be surveyed to determine awareness and general receptiveness to the new initiatives starting in September 2009.

**Key outcomes**

*do you measure?*  
**Outcome #1:** Awareness will reach 95% by June 2010; understanding will increase and reach 85% by June 2011; receptiveness will increase and reach 80% by June 2011.

**Outcome #2:** Awareness and receptiveness of parents will increase to 50% by January 2012.

**IMPLEMENTATION AND RESULTS**

This highly integrated set of initiatives will require thoughtful sequencing and significant cross-functional coordination. To enable this, HCPS is establishing a Project Management Office (fully described in the "Organizational Capacity and Partnerships section) to oversee initiative design and implementation, develop detailed workplans and tracking mechanisms, and ensure the meeting of key milestones and steady coordination across initiatives. In sequencing our initiatives, we have followed key principles outlining the major dependencies among initiatives:

**Principle #1:** *New teacher and principal evaluation systems must be field-tested and acknowledged as valid by all major stakeholders prior to making any major changes to individual compensation.* While teachers will be first allowed to opt in to the new system as of July 2010, there will be no impact on their compensation for at least two years afterward.

**Principle #2:** *Develop new approaches to value-added measures prior to major compensation changes.* Any changes to current measurement of student learning gains at the individual teacher level must be field-tested and have achieved broad buy-in before they can determine major components of teachers' evaluation and compensation.

**Principle #3:** *Build key Human Resources recruitment and dismissal capabilities early*, in order to manage new approaches to evaluation, tenure, and compensation. In addition, should the district need to counsel out significant numbers of teachers, we will need to ensure a steady pipeline of high-quality candidates to fill those positions.

**Principle #4:** *Develop school and district scorecards—key elements of the new performance management system—prior to introducing new principal evaluation system.* Through the process of developing school and district scorecards, we will make critical decisions about our goals and key metrics that should deeply influence the principal evaluation system. In addition, developing the performance management system early on will clearly signal to both district personnel and external audiences our vision for achievement gains over the next five years.

**Principle #5:** *Emphasize piloting approach within induction.* While we are seeking to accelerate the pace of roll-out in other areas, such as teacher evaluation, where it is essential that all teachers be subject to the same system, it makes more sense to use a piloting approach to induction. This is intended both to build capacity within the district over two years, and to enable a more rigorous research design through the use of control groups. While we believe that high-quality induction will accelerate the pace of improvement for our new teachers, the existing evidence is mixed, and we will want the results from this initiative to influence both our own decision-making as well as the national policy discussion.

#### *Phased Implementation*

With these sequencing principles in mind, we have split the project into four main phases (see Figure 19). There will be significant overlap among the phases, as several initiatives require substantial early design work in order to meet our aggressive timelines. However, the rough contours are:

**Phase 1:** *Organizational design and planning (August 2009 – January 2010).* During this phase we will develop the overall project management structure, including the appointment of executive sponsors and initiative owners, and fully staff and begin training the Project Management Office. We will also develop detailed work plans for the design and implementation of each initiative, and begin critical conceptual work, including the development of the new teacher evaluation instrument.

#### Critical execution milestone:

January 2010: Teacher evaluation instruments redesign complete

**Phase 2:** *Initiative design (January 2010 – June 2010).* HCPS will use the first half of 2010 to work through the detailed design of all teacher effectiveness initiatives. The most critical and urgent activities are redesigning teacher evaluation and refining the teacher value-added measure, the first teacher effectiveness strategic priority and the lynchpin of the overall effort. Without a means to accurately evaluate teacher performance, HCPS will not be able achieve the remaining teacher effectiveness strategic priorities. Important integrated efforts are the redesign of the performance management system (metrics, scorecards and data) and principal evaluation. Principals need to be held accountable for conducting robust teacher evaluations and will need to be supported with rich, user-friendly data upon which to base those evaluations.

Also important to be developed in the design phase are the initiatives that support teachers (new teacher induction, curriculum, instructional supports and assessment) so they will have the tools, student data, mentoring and coaching required to address their developmental needs as identified in the new evaluation process.

Critical execution milestone:

February 2010: New teacher induction program design complete

March 2010: Additional recruiting personnel hired and trained

May 2010: New HR Business Partners hired and trained

June 2010: Value-added measure and principal evaluation system redesign complete

*Phase 3: Initiative roll-out (2010-2012).* Following the year of planning and design, the 2010-11 and 2011-12 school years will see the launch of all the new initiatives. HCPS believes in the need to move very quickly in this work so it can achieve the substantial increases in student achievement sought within the 5-year timeframe. With the existing capability within the organization and expertise of external partners (detailed below), HCPS believes it is well positioned to launch these initiatives successfully. Learning from the district's experience implementing new performance pay and curriculum initiatives, initiative owners and the Project Management office will be continuously monitoring execution and will adjust and modify efforts as needed.

Critical execution milestones:

July 2010: Teachers express through a survey that they understand the new salary plan and are ready to begin the opt in period

August 2010: Launch of new teacher evaluation system pilot, new teacher induction program pilot, principal evaluation pilot and new compensation plan

September 2010: Awarding of new high-needs performance bonuses

August 2011: Launch of urban teacher residency program, principal leadership development program pilots.

June 2012: All teachers and principals will have simplified data dashboards

Expected outcomes:

- Teacher evaluations that are correlated with student outcomes
- Underperforming teachers are identified and dismissed
- Improved learning on track and ACT/SAT student performance

*Phase 4: Ongoing monitoring, evaluation, and refinement (2012-2014).* Based on 3 years experience with the new initiatives, HCPS will use the last two years of the project to evaluate the initiatives to see whether student achievement outcomes are being met and refine efforts based on the amount of progress made.

Critical execution milestones:

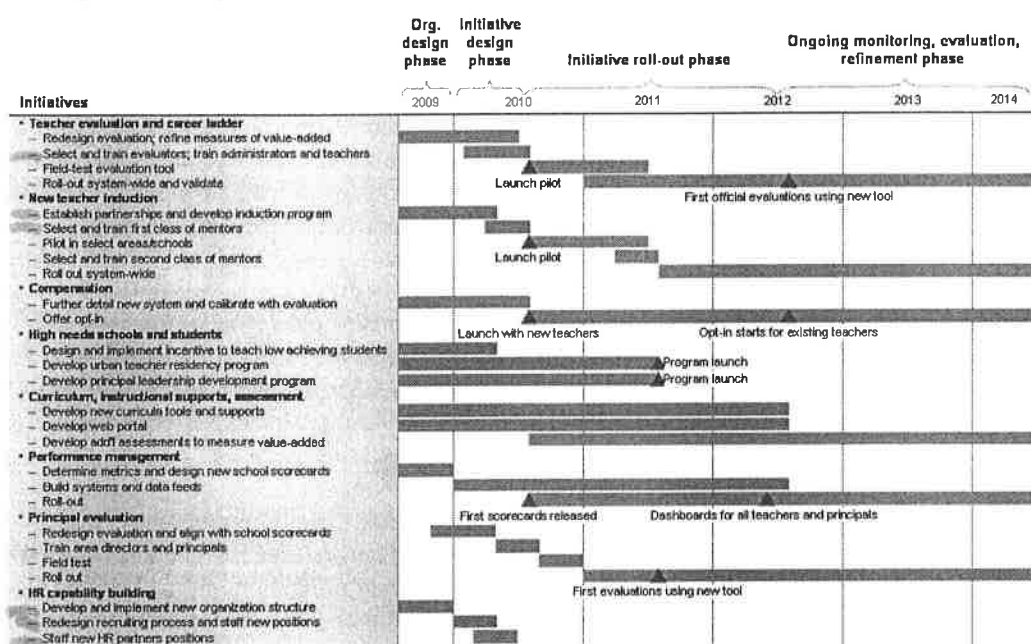
Fall 2012: Teacher evaluations are able to adequately differentiate teacher performance. All teachers on the new salary plan will receive a salary based on their evaluated performance.

Fall 2013: Teachers placed on career ladder after receiving two evaluation scores from the new evaluation system. First Instructional Leaders named.

Expected outcomes:

- Improved retention of high-performing teachers in high-needs classrooms
- Improved postsecondary readiness (HS graduation, AP/IB participation and performance)
- Improved postsecondary success (postsecondary enrollment / GPA)

Figure 19: High-level implementation plan



## ORGANIZATIONAL CAPACITY AND PARTNERSHIPS

HCPS operates in a very lean administrative environment and will require substantial additional resources and assistance from external partners in order to implement its plan to improve teacher effectiveness. “Owners” for these initiatives have been identified within the current HCPS organization structure. Aside from the creation of a new Project Management Office that will report to HCPS senior staff, no additional organization changes will be required.

### Project Management

**Project Management Office:** HCPS will create a Project Management Office whose Director will report directly to the Superintendent. The office will consist of an overall Project Director who will lead four project managers responsible for day-to-day design and implementation of specific initiatives (evaluation, induction and performance management have dedicated Project Managers and other initiatives will be overseen by one Project Manager), and an Associate Project Director who will assist the Project Director. The Project Manager will have oversight of the budget and supervise district personnel to carry out the proposed initiatives. He/she will also be the liaison between external partners and service providers and HCPS to ensure that the needs of the district are met. In order to support and build the capacity of the Project Management Office during the critical design and early implementation phase, HCPS will utilize the services of the Boston Consulting Group in the first ten months to work alongside the Project Managers. In year 3, the project team will be reduced to an overall Project Director and two Project Managers who will focus primarily on evaluation and performance management.

These Project Managers will be drawn from current district staff who have experience working cross-functionally with multiple stakeholders in implementing district-wide initiatives (e.g., College Board’s EXCEerator program, the five-year federal Teacher Incentive Fund grant). Project Managers will be selected based on their capability to think strategically, maintain a big

picture perspective, and possess strong execution skills. In the design phase, they will work with initiative owners who have been identified within the HR, Administration, Curriculum and Instruction, Assessment and Accountability and IS departments to implement the initiatives. The PMO will be responsible for tracking, measuring, and monitoring of progress for the overall plan and each initiative, including the key college readiness metrics and individual initiative progress towards identified goals, outcomes and milestones. HCPS has the data systems and reporting in place to track the student outcomes progress, but will begin tracking the specific metrics related to the individual initiative outcomes and create the necessary reports to enable the PMO to monitor progress at project initiation.

**Executive Sponsors:** Each initiative will be assigned an Executive Sponsor from the ranks of the district's senior leadership team, who will bear bottom-line responsibility for ensuring that each initiative is expertly designed and implemented. They will be responsible for making key design choices and implementation decisions, and raising issues to the Project Director when necessary.

**Initiative owners:** Leaders within the key functional areas (e.g., Curriculum and Instruction, Assessment and Accountability, Human Resources, Administration) will be assigned as owners of each initiative and will be responsible for overseeing design and implementation. They will report to their executive sponsors and will work closely with the new Project Management Office to drive the process forward.

#### *Role of Human Resources*

A major outcome of the revamped teacher evaluation system is the removal of underperforming teachers, both tenured and non-tenured. To enable the HR department to assist principals in dismissing underperforming teachers as well as recruiting new teachers, HCPS will need additional HR capacity, which will be filled by the new HR Business Partners. In addition, a number of external partnerships will support HCPS initiatives in induction, and recruiting teachers and principals for high-needs schools.

#### *Coordination with External Researchers*

The district's Office of Assessment and Accountability provides oversight of all research and evaluation for the district and regularly contracts with internal and external evaluators to provide services in these areas. The department employs a full-time employee to act as point person to coordinate research and evaluation efforts. An additional staff member dedicated solely to this project will be hired. HCPS will use an external partner for the research and evaluation of the new initiatives in this project and will leverage current staff expertise to coordinate and manage the external partner.

#### *Fiscal Management*

HCPS has put in place a number of internal financial controls to monitor expenditure of funds awarded by federal and state grants. Each grant is supervised by a Project Director who manages all finances associated with the project. The Director is supported by the Grants & Research Operations Office which employs a full-time accountant. Grants Office staff assists the Director



in ensuring expenditures are allowable and that they relate to executive milestones, goals and objectives.

The Hillsborough Education Foundation, a not-for-profit 501(c) 3 organization whose purpose is to help HCPS teachers and students excel in programs that are not funded by public tax revenue, will be serving as the district's fiscal agent for this grant. Led by a volunteer Board of Directors made up of business, education and community leaders, the Foundation has invested more than \$55M in public education since its inception in 1988. HEF has funded the recruitment of new teachers by sponsoring the annual Teacher Interview Day event, and has formed school/business partnerships with local businesses such as Bright House Networks and Citigroup. HEF administers an annual budget of over \$6M, using just 4% of funds raised for administrative costs.



### *External Partnerships*

In addition to repurposing current employees and hiring both temporary and permanent personnel to implement the proposed program, HCPS will also contract with external partners to assist in launching and sustaining Project STARS.

**Cambridge Education:** Cambridge Education will provide the critical services required to design, implement, model, and assess the district's new teacher evaluation system. They will also provide extensive training to all stakeholders to ensure proper preparation for the success of the system. Their experience and quality assurance process will build capacity for the district to sustain the teacher evaluation system beyond the funding period of the grant.

**Boston Consulting Group:** The district will continue its relationship with Boston Consulting Group (BCG) in two ways. BCG will 1) support program management efforts to guide the launch of each initiative and to help the district build capacity and sustainability and 2) help design the performance management system (determining key metrics, creation of dashboards and scorecards).

**Assessment Vendors:** To eliminate the current deficiencies in the quality and quantity of the district's assessments, vendors will be contracted to provide assessments in available content areas in the form of pre- and post-tests, formative and summative assessments, semester exams, and end-of-course exams.

**Communications Consultants:** The district will partner with a communications consultant who can help conduct focus groups, develop message strategies, create brochures and other materials, and provide other services. For instance, Hill & Knowlton, an international communications consultant with an office in Tampa, has worked with the school district in the past and has the necessary expertise, resources, and knowledge of the community.

**Datawise:** *Datawise* is an online course which is offered through the Harvard Graduate School of Education. In an effort to arm teachers and administrators with the knowledge and skill in using data to drive instructional decisions, the district will contract with the organization to educate key district and school personnel in a "Train the trainer" model. Once the key personnel

are trained, they will become district-wide trainers dispatched to sites throughout the county to provide professional development to school faculties.

**New Teacher Center:** To improve its Apprentice Teacher Acceleration Program, HCPS will enter into a long-term partnership with the New Teacher Center (NTC). NTC will help engage administrators in the development of new teachers, provide training for beginning teachers and teacher mentors, and assist the district in building capacity and sustainability for the new program by providing guidance and best practice in developing financial resources.

**Mathematica:** HCPS plans to work with Mathematica Policy Research to conduct performance assessments in three topic areas, all designed to help HCPS make adjustments to the teacher effectiveness initiatives going forward: 1) a teacher induction pilot, 2) overall teacher effectiveness reform effort, and 3) individual teacher performance through a value-added metric. Mathematica has extensive experience in evaluating teacher induction programs, helping educators analyze outcomes of reform efforts, and estimating value-added measures for teachers.

**VAL-Ed:** HCPS will purchase VAL-Ed in order to measure principal effectiveness. VAL-Ed is an evaluation tool developed by Vanderbilt University which measures principals' behaviors and actions on the intersection of core components and key processes. It is a multi-respondent (principal, teachers, and supervisor) rating scale that requires respondents to make judgments about a principal's leadership behaviors that influence teachers' performance and students' learning.

**The Danielson Group (Charlotte Danielson):** The Danielson Group will assist the district in the redesign of teacher evaluation instruments to ensure they are research-based, rigorous, reliable, and valid. In addition, the Group will assist in the development of surveys for the district's teachers, students and parents to assess teacher effectiveness and student learning.

**Urban Teacher Residency United:** In order to address the challenges associated with high-needs students and schools, HCPS will partner with Urban Teacher Residency United (UTRU). UTRU will help Hillsborough create an urban teacher residency program that recruits and prepares new teachers to serve high-needs students. Not only will they provide targeted consulting and support, they will give HCPS access to a robust network of other districts that have initiated urban residency programs. This network will provide a venue to collaborate with and learn from others involved in utilizing the teacher residency model.

**New Leaders for New Schools Design Team:** HCPS will partner with New Leaders for New Schools (NLNS) to design a principal leadership program to develop a pipeline of leaders for high-needs schools. NLNS and HCPS are currently investigating options which would define the length of the relationship such as forming an explicit partnership, working through a consulting arrangement, or planning and launching the initiative through a sharing of the effective practice that NLNS has developed over nearly a decade of research and practice.

#### *Data Infrastructure Capability*

**Data system infrastructure strengths and challenges:** Over the last 4 years, HCPS has worked diligently to create a data system that is able to measure the impact a teacher has on a student. By pioneering Florida's Merit Award Program (MAP), Hillsborough has designed an

advanced system that can link courses, teachers, and students to determine the value-added impact of teachers' instruction. A unique sequence number links all students, teachers, and courses so that the class roll for any course section can be identified. The capability to link the data began in 2000-01, so the district is capable of providing longitudinal data where necessary.

State testing data (FCAT) as well as district end-of-course exams, pre-tests and post-tests are currently tied to classroom teachers as part of MAP. Student enrollment is captured four times per year (October, December, February, and April) under the current performance pay system, so that only those students enrolled for a specified period are counted in the teacher's value-added calculation. The district has the capability of identifying test data, course grades, Individual Education Plan information, along with such demographic information as date of birth, zip code, home language, race/ethnicity, and gender for all students.

The personnel data system, while not as comprehensive as the student side, captures a variety of data that allow district staff to make informed decisions. Categories tracked include certification, degree, years of experience, salary, attendance, and participation in professional development activities. One gap that has been identified is the lack of data on teachers' college major and degree-granting institution. This is an area that is being addressed through upgrades to HR capabilities.

**Data system quality and security:** Quality assurance is actively managed. Classroom teachers, for example, verify class rolls three times per year, twice during the state's FTE periods and a final time as validation before the MAP calculation is performed. In addition to teacher verification, principals, along with their data processors, report to a central check-in twice during each FTE period to have rosters and information reviewed by district staff.

Many other measures are in effect to ensure data quality. Schools have access to manuals for all systems, the system does not allow duplicate student IDs or course sequence numbers, and, most importantly, a myriad of error reports exist that direct schools to the data elements that need to be corrected. For example, schools are currently reviewing three reports of students with dropout codes assigned, in order to correct the records of students who were subsequently found enrolled in another district or state.

**Data usability, training and support:** The district's data systems are continuously improved. For example, when teachers reported errors in student enrollment records during the first year of MAP, new reports were created to ensure that records were validated specifically for MAP before the summer calculations were run. When the Superintendent asked principals to be more comprehensive in their evaluation of teachers, they in turn asked for a tool that would allow them to review data on a single report and, thus, the Teacher Summary Report was created. Key "next steps" already in production are the development of a Principal Summary Report, more data on off-track ninth graders and over-age students at all grade levels, as well as the merging of Scantron Achievement Series data into the larger Student Information Systems.

## **CAPTURING LESSONS LEARNED AND EVALUATION**

HCPS is committed to research and evaluation of the proposed initiatives to ensure the overall success of this project. Vigorous evaluation will allow HCPS to identify the strengths and weaknesses of the plan in real-time and to make adjustments when necessary. In addition,

comprehensive research and evaluation will allow HCPS to share successes with other districts, enabling broad student impact through replicating and scaling these initiatives.

Each of the initiatives proposed has been designed with current research and best practice in mind. The goal of the evaluation will be to ensure that implementation of these initiatives yields the impacts and performance gains that are expected. It will also be critical to identify which of the many changes are having the desired effects on student outcomes. Third party experts will be used to help address this issue.

To assess progress the following student-level outcomes will be monitored on an annual basis:

- Postsecondary enrollment and success
- High school graduation rates
- Participation and performance on college entrance exams (SAT and ACT)
- Advanced Placement (AP) / International Baccalaureate (IB) course enrollment and success
- Student scores on Florida Comprehensive Assessment Tests (FCAT)

HCPS seeks to develop a plan to ensure that all students are prepared to succeed after high school. To do so, HCPS is taking bold steps through the design and implementation of each initiative to ensure that there are effective, well-trained teachers in every classroom, that high-needs students are taught by effective teachers, and that excellent principals lead our schools.

Questions to be answered through the evaluation of this project include:

1. Is the new evaluation system (teachers and principals) able to differentiate performance effectively?
2. Are we effectively identifying underperforming teachers and either developing them or counseling them out of HCPS?
3. Does intensive induction lead to better teacher development and increased retention of high potential teachers?
4. What incentives are needed to get high-performing teachers to work with high-needs students and at high-needs schools?
5. Is HCPS able to recruit enough high quality teacher candidates to fill expected vacancies?

The overall Project Director and district Superintendent are ultimately responsible for answering the research questions. To do this the Project Director will be tasked with compiling monthly reports from initiative leaders. These reports will address progress against implementation goals and performance goals. The specific goals for each research question will be determined in Phase 1 of the implementation. The Project Director will report each quarter to the Superintendent and Executive Sponsors on the interim progress on the research questions.

These quarterly reports will measure actual performance against the expected result. For example, results on teacher evaluations will be assessed against the expected teacher distribution in the district as reported in this document.

Mathematica Policy Research, a world renowned research and evaluation firm, will be retained to help HCPS answer some of these questions and provide the metrics needed to evaluate others. Mathematica will be responsible for analyzing the induction initiative throughout the 5-year time frame of the grant. They have agreed to report back on a monthly basis to the project management office. They have also agreed to track teacher retention rates, the rate of effective teachers working with high-needs students, and the ability of HCPS to recruit effective teachers.

The Project Management Office, which will consist of the Project Director and the initiative heads, will be responsible for “course correction” throughout the lifetime of the project. The monthly meetings as described above will be used to diagnose implementation and / or performance issues across each initiative. These meetings will use objective data provided by Mathematica and the district’s Information Services department, as well as milestone tracking from this document to assess progress against goals.

The Project Management Office will be encouraged to make small implementation adjustments “on the fly” to ensure efficient execution of the initiatives. When a change would go against the initial design of an initiative, however, that change must be approved by the Superintendent and her staff.

The Project Director will be responsible for sharing the data discussed, decisions made, and problems debated in monthly program management meetings with the steering committee, the foundation, and key stakeholders. A quarterly report addressing the milestones and research questions will be written and shared as well.

Personnel from the Department of Assessment and Accountability will also be integral to the monitoring of grant milestones. The Manager of Evaluation, who oversees all district program evaluations, will work with the Supervisor of Federal Program Evaluation and the Coordinator of Grant Evaluations. This team will assist the Project Management Office and share data back and forth in order to evaluate the grant effectively. All data will be FERPA compliant.

In addition, the Communications Department of HCPS, in cooperation with an external communications firm, will undertake the steps necessary to ensure the dissemination of results with internal and external stakeholders.

The HCPS grant evaluation team will be assigned to assist Mathematica and any other third party evaluators in assessing the performance of these initiatives. The expectation is that the internal and external evaluation teams will work together to assess progress against project goals, but will also share relevant interim assessments to the program management team such that “course corrections” can be made. HCPS recognizes that current capacity, although extensive, will not be enough to evaluate this grant, which is why Mathematica will be hired to help with induction, and the tracking of teacher-based metrics.

## **PROJECT BUDGET**

HCPS has a state-wide reputation for conservative budget management, which has kept HCPS from the dire financial straits of many Florida districts. HCPS is one of the only districts in the state that has not had to lay off or furlough employees due to its careful financial management. The current HCPS budget is approximately \$2B.

## Supporting Teachers to Accelerate Results for Students (STARS)

Details of budget items can be found in the Budget Appendix. HCPS is committed to the goals of this project and has developed a project budget in which the district is paying for half of the required funding (~\$100M of \$200M). The budget was developed by the steering committee to maintain the conservative approach to budget planning that has been a HCPS tradition.

Initiatives (\$M)	Year 1	Year 2	Year 3	Year 4	Year 5	5 year total cost	District funding	Gates funding	Ongoing district funding	Other funding
Measuring teacher effectiveness	3.8	11.3	7.3	6.2	6.2	34.8	13.8	21.0	6.1	0.0
Next generation pay for performance	0.0	10.0	10.0	10.0	10.0	40.0	19.5	20.5	10.0	0.0
High needs incentives	0.2	6.0	7.2	8.1	7.6	29.1	15.2	8.9	3.8	5.0
Apprentice teacher acceleration	0.4	2.1	9.3	8.9	9.0	29.7	15.3	14.4	8.9	0.0
Enhanced recruitment and dismissal	0.2	0.6	0.6	0.6	0.6	2.7	1.3	1.5	0.6	0.0
Strengthen school leadership	0.3	0.2	1.1	1.0	1.0	3.6	1.8	1.7	1.0	0.0
Performance management	9.9	15.5	10.9	4.9	4.8	45.8	26.3	19.5	0.8	0.0
Integrated instructional toolkit	1.4	1.5	1.5	0.7	0.7	5.8	3.7	2.1	0.5	0.0
Change management / communications	3.5	3.0	1.6	1.1	1.1	10.3	0.2	10.1	0.8	0.0
Fiscal Agent	0.1	0.1	0.1	0.1	0.1	0.6	0.0	0.6	0.0	0.0
<b>District funding</b>	<b>6.9</b>	<b>14.9</b>	<b>23.1</b>	<b>23.2</b>	<b>28.8</b>	<b>97.0</b>				
<b>Gates funding</b>	<b>12.7</b>	<b>35.4</b>	<b>25.5</b>	<b>16.5</b>	<b>10.3</b>	<b>100.4</b>				
<b>Other funding</b>	<b>0.0</b>	<b>0.0</b>	<b>0.9</b>	<b>2.0</b>	<b>2.1</b>	<b>5.0</b>				
<b>TOTAL</b>	<b>19.7</b>	<b>50.2</b>	<b>49.6</b>	<b>41.7</b>	<b>41.1</b>	<b>202.3</b>	<b>97.0</b>	<b>100.4</b>	<b>32.5</b>	<b>5.0</b>

The following are brief descriptions of each initiative. In general, short-term capacity-building costs will be borne by the Bill & Melinda Gates Foundation (BMGF), with ongoing costs will be either borne totally by the district or shared by the district on an increasing percentage scale.

**Measuring Teacher Effectiveness:** Funding for this endeavor includes consultant partners, personnel, and equipment for personnel. Consultant partners include Cambridge Education, who will provide evaluation training and capacity building. Cambridge Education estimates their initial budget for Years 1-3 at ~\$10M based on the large number of peer evaluators and administrators that need to be trained.

<b>5 year total cost (\$M)</b>	<b>34.8</b>
District funding	13.8
Gates funding	21.0
Ongoing district funding	6.1

Other expenditures on evaluation include the following:

- TEACHSCAPE will provide the programming necessary for evaluators to record observations digitally and transmit them to a secure server. HCPS will repurpose technology funds to pay Year 1 costs (1/3 of the total costs), with BMGF funding Years 2 and 3.
- HCPS will repurpose available staff development funds to redesign the teacher evaluation instrument with Charlotte Danielson.
- BMGF will fund the work of consultants hired in Year 1 to evaluate and design the district's new value-added measures.
- Evaluators and lead evaluators will be funded by BMGF in Year 2, with HCPS assuming increased financial responsibility for their salaries in Years 3-5.

**Next Generation Pay-for-Performance:** \$10M per year will be added to the district's salary and performance pay budget to run dual compensation tracks for teachers. HCPS will use existing salary funds and will partially repurpose existing

<b>5 year total cost (\$M)</b>	<b>40.0</b>
District funding	19.5
Gates funding	20.5
Ongoing district funding	10.0

performance pay funds to move financial support for compensation from BMGF to HCPS by the end of the grant.

**Programs and Incentives for High-needs Students:** This project will provide incentives for any teacher who increases achievement for their lowest performing students (Level 1 and 2 under FCAT). Funding for this incentive will move from BMGF to HCPS over Years 1 through 5 and will be capped at \$4M to ensure sustainability. HCPS currently offers a 5% bonus to effective teachers who transfer to schools where 90% or more students receive FRPM (almost exclusively elementary schools). This project will fund the extension of the 5% bonus to effective teachers who transfer to 75% +FRPM middle schools and 60% +FRPM high schools.

<b>5 year total cost (\$M)</b>	<b>29.1</b>
District funding	15.2
Gates funding	8.9
Ongoing district funding	3.8
Other funding	5.0

HCPS will partner with the Urban Teacher Residency United program (UTRU) and New Leaders for New Schools to support specialized year long residency programs to train talented teachers and principals to work effectively in high-needs schools. Stipends for intern residents will move from BMGF to HCPS in Years 3-5, with an additional \$5M expected from an AmeriCorps grant (UTRU will assist in applying for the AmeriCorps funds). Personnel to oversee the intern residents, and stipends for mentor teachers and principals (who work with residents) will be funded by BMGF initially and then transfer to HCPS.

**Apprentice Teacher Acceleration Program:** The district's former Preparing New Educators program (PNE) will be replaced with a redesigned new teacher induction program. The New Teacher Center (NTC) will engage administrators in the development of new teachers, provide training for beginning teachers and teacher mentors, and assist the district in building capacity and sustainability for the new program. The NTC will be primarily funded by BMGF, with HCPS repurposing staff development funds for partial support.

<b>5 year total cost (\$M)</b>	<b>29.7</b>
District funding	15.3
Gates funding	14.4
Ongoing district funding	8.9

Other expenditures on induction include:

- Mathematica, who is currently conducting national research in new teacher induction, will evaluate the district's efforts in this area.
- HCPS and BMGF will share the cost of training materials for new teachers and mentors, with HCPS taking on an increasing percentage of costs.
- Mentors and lead mentors will revert to 80% district funding by Year 5 for sustainability.
- Teacher training stipends will be paid by BMGF with HCPS providing ongoing costs.

**Enhanced Recruitment & Dismissal:** Seven HR Business Partners and one lead partner will assist principals and ADs in all seven HCPS areas with hiring and dismissing teachers. HCPS and BMGF will share funding for these positions.

<b>5 year total cost (\$M)</b>	<b>2.7</b>
District funding	1.3
Gates funding	1.5
Ongoing district funding	0.6

**Strengthen School Leadership:** HCPS will partner with Vanderbilt University, authors of the VAL-Ed 360° Principal Evaluation system, to develop a principal evaluation system. Costs for VAL-Ed will be shared between HCPS and BMGF, with HCPS taking on an increasing percentage over time. Costs occurring for evaluation design and supervisor, principal, and AP training will be funded by BMGF. Principal and AP bonuses will be paid for by BMGF and HCPS through repurposed funding from existing performance pay programs.

<b>5 year total cost (\$M)</b>	<b>3.6</b>
District funding	1.8
Gates funding	1.7
Ongoing district funding	1.0

**Performance Management:** Providing all stakeholders with the data necessary to support all project initiatives is critical to project success. The creation of performance management dashboards and scorecards will be funded by BMGF. Online training in the effective use of available student data will be provided by *Datawise* Online Professional Development, funded by BMGF.

<b>5 year total cost (\$M)</b>	<b>45.8</b>
District funding	26.3
Gates funding	19.5
Ongoing district funding	0.8

HCPS will fund the installation of computer labs in every school (2 in middle / high schools) where students will take assessment tests – eventually even state FCAT – online. The funding of the purchase and construction of valid and reliable tests for all courses will be shared by BMGF and HCPS and funded through repurposed recurring and stimulus funds.

Other performance management costs include:

- The Boston Consulting Group (BCG) will assist HCPS in designing and implementing a strategic plan for an effective performance management system. Funded by BMGF.
- Infrastructure development, increased server/storage capacity, technical support, and software will be funded by BMGF, with HCPS assuming a larger share over time.
- Additional programmers will maintain the ambitious data warehouse design.

**Integrated Instructional Toolkit:** To be effective, strong teachers need cutting-edge content related resources. The development of model lesson plans and pacing guides for all courses will be funded by HCPS, with BMGF funding the development and implementation of an electronic portal where teachers can access exemplary instructional resources from lesson plans to digital videos of ideal lessons being taught. Experienced, effective teachers will serve as Peer Coaches and will engage in follow up activities with teachers after training ends – funding is to be shared by HCPS and BMGF.

<b>5 year total cost (\$M)</b>	<b>5.8</b>
District funding	3.7
Gates funding	2.1
Ongoing district funding	0.5

**Change Management / Communications:** BMGF will be the primary funder of these project-related expenses. The expenses include the following:

- A Project Director (PD) to oversee the project. Assisted by an Associate Project Director, the PD will be responsible for overall project functions and supervising the project team.

<b>5 year total cost (\$M)</b>	<b>10.3</b>
District funding	0.2
Gates funding	10.1
Ongoing district funding	0.8



remove as much subjectivity as possible from the system. In addition, the new corps of expert peer evaluators will provide an outside view, less influenced by personal attachments. To manage the culture shift and enhance evaluator skills, the district will employ the expertise of Cambridge Education to intensively train administrators and peer evaluators in the new system. Lastly, the new principal evaluation system will hold principals tightly accountable for the reliability of their evaluations and their decisions to grant tenure.

**Risk #2:** Stakeholders are unaware of or fail to understand major changes, such as the evaluation and compensation systems.

**Challenges / Implications:** HCPS risks losing key stakeholder support and initiative buy-in if communication is insufficient or poorly executed. For instance, teachers can quickly sour on the new compensation plan if they do not sufficiently understand the evaluation criteria and link to compensation.

**Mitigation:** The district will engage in a change management initiative, which will include intensive communications to all stakeholders and involvement of key stakeholders, including teachers, in initiative design and roll-out. This will be led by the district's communications team, with significant support from an external communications firm with expertise in education, such as Hill and Knowlton. In addition, the district will engage with Union leadership, principals, and community leaders to empower them to serve as initiative advocates.

**Risk #3:** Ongoing costs are higher than estimated, threatening sustainability.

**Challenges / Implications:** The total ongoing cost to run these initiatives is expected to be ~\$32M based on conservative estimates. Other factors such as a worsening economy, lower than expected dismissals, or lower opt in rates, could increase the funding need.

**Mitigation:** The conservatively estimated ongoing costs represent roughly 2% of the district's operating budget, which HCPS should be able to absorb within five years. In addition, HCPS will pursue two strategies to bridge any funding shortfall: reallocate funds from the district's existing programs, and aggressively seek additional funding from external partners. HCPS has analyzed all recurring and non-recurring funds to identify potential funds that can be reallocated to support the new initiatives. In addition, the HCPS Grants and Research Operations Office, which brings an average of \$30M per year into the district budget, will continue to aggressively seek competitive funds.

**Risk #4:** Change in district, Board, or Union leadership.

**Challenges / Implications:** The leadership teams have played an integral role in developing the initiatives. If members of the leadership team depart during the course of implementation, it can significantly disrupt the district's momentum. In addition, new leadership can bring perspectives that conflict with existing strategies.

**Mitigation:** Members of the leadership team have considerable tenure in the district. Unlike many large school districts, both the Board and senior district leadership have remained stable over time. HCPS and CTA also have a long history of working together in a highly collaborative manner, and we would expect that to continue. In addition, the district, Board and Union have signed a Memorandum of Understanding that commits the organization to the core elements of this plan. Up-and-coming district and Union leaders will also be deeply involved in the detailed design and implementation of initiatives, and we will actively seek to develop these individuals into the leaders of tomorrow.

## Supporting Teachers to Accelerate Results for Students (STARS)

- Individual Project Managers (evaluation/compensation, induction, assessment and performance management, and stakeholder engagement/change management). BMGF will fund these positions during the project, with HCPS assuming them as an ongoing cost.
- Change management will be facilitated by the intensive training of key communicators – the CTA, the School Board, and senior district staff. Senior leadership of all groups will receive off-site intensive training by consultants introduced through the Gates grant process.
- A communications consulting firm will be engaged to assist the district's Office of Communications in designing and implementing a successful project communications plan, including all materials. This will be funded by BMGF with ongoing support from HCPS.
- Boston Consulting Group (BCG) will be retained over the life of the project to guide the launch of each initiative, and to help the district build capacity to manage the program.

**Fiscal Agent – \$0.6M funded by BMGF:** The project's Fiscal Agent, the Hillsborough Education Foundation, will add two personnel to oversee project finances. Personnel will also receive the supplies and equipment necessary to perform their job related duties. BMGF will assume sole funding of the Fiscal Agent.

**Reprioritizing and Reallocating Funding:** HCPS has identified specific recurring and non-recurring funds, some of which are categorical, to repurpose and reallocate for this project (see Sustainability for identified list of funding sources). Under Project STARS, greater funding - salary, performance pay, and staff development - will be directed to schools with high-needs students who are primarily low-income and minority students. While these funds are not given directly to individual schools, the schools nevertheless benefit from their use.

**Plan for Funding Incremental Costs:** HCPS has identified nearly \$100M of school system funding that will be redirected to this effort (see Budget Appendix for details). Additional sources of external funding include a \$5M AmeriCorps grant and federal/state grants such as Race to the Top and Teacher Incentive Fund. The HCPS Grants and Research Operations Office brings an average of \$30M per year into the district budget, and will continue to successfully seek all available competitive funds.

The district's strategy for shifting from external to internal funding over the next five years is to:

- a. Continue to aggressively repurpose and reallocate federal, state, and stimulus funds
- b. Aggressively pursue funding from outside sources
- c. Continue the responsible and conservative financial stewardship that is our hallmark – sustainability planning was developed utilizing conservative growth data to ensure the financial success of the overall project.

### CHALLENGES AND RISKS

**Risk #1:** New evaluation system does not effectively differentiate teacher performance.

**Challenges / Implications:** If the new evaluation system fails to identify ineffective teachers, HCPS will not be able to support or remove them. In addition, with the new compensation system, there is major budget risk if teachers are inaccurately identified as high-performers.

**Mitigation:** A well-functioning evaluation system is dependent on 1) clear, objective standards and measures of performance; 2) a culture of frank and honest evaluations; and 3) proper training to ensure consistency and comparability among evaluations. Measures of student learning gains in addition to a new rubric for teacher evaluation from Charlotte Danielson will be used to

## Supporting Teachers to Accelerate Results for Students (STARS)

The Strategic Priorities identified by the Bill and Melinda Gates Foundation as the cornerstones of the Intensive Partnership project mirror the School Board's existing Strategic Plan and are in line with the district's current agenda. HCPS has supported college / career readiness and performance pay for several years; this project builds the capacity of the district to move further and faster, but in the same direction, as planned prior to this funding opportunity. Because this project mirrors the Board's years-long vision, Board policies already reflect support for the Intensive Partnership's Strategic Priorities and are embedded in existing district practices. Thus, the project will move forward swiftly without time-consuming policy and practice discussions.

The district's sustainability plan builds on the following five levers: community support, capacity building, culture shifts, structures, and resource allocation.

**Community Support:** Community support is critical to sustainability. Stakeholder alignment and support will enable the district to overcome many potential challenges. Alignment around the project mission ensures that issues can be resolved without compromising the project's goals, even if there are changes in stakeholder leadership. The Union, teachers, administrators, community members, and all district divisions were involved in the project development through focus groups, surveys, and working teams. Progress was shared through open stakeholder engagement.

The project includes an ambitious change management plan that includes significant and varied communication with stakeholders. The open change management process is geared towards teachers and will ensure that change happens "with" teachers and not "to" them. Teachers are critical to effecting change in a school district, and getting them on board will enable this culture shift to take hold more completely.

To ensure stakeholders remain engaged and enthusiastic about the project, HCPS will seek their opinion and advice during implementation. Project implementation will be phased in, through pilots, which will allow for refinement and modification based on stakeholder feedback.

Community support is also based on the need to maintain relationships and communication channels among all stakeholders. These will be routinely reviewed and maintained.

**Capacity Building:** The implementation plan for this project has been grounded in the belief that the district must be able to sustain all changes. Third party partners were selected for their ability to help the district build the capacity for these changes. Partners such as Cambridge Education, the New Teacher Center, and Urban Teacher Residency United, have agreed to share their knowledge and best practices, to allow the district to subsequently absorb and implement independently. Through this grant, HCPS will own new policies and approaches to teacher effectiveness and the know-how to implement and sustain those policies.

**Culture Shifts:** With the advent of the district's performance pay system four years ago, HCPS made the cultural shift towards paying teachers for student performance. This project, with its new compensation system, will move more fully to pay-for-performance. While existing teachers may opt in or out of the new system, ALL new teachers will enter employment with the new salary schedule. HCPS will be able to slowly migrate to a culture based completely on performance. This gradual shift will be sustainable because of the unique history of performance pay in HCPS.

**Risk #5:** Union membership delays or is unwilling to support new initiatives.

**Challenges / Implications:** While the district has collaborated closely with the CTA in developing the initiatives, the broader CTA community may not endorse the recommendations. Broad support of members is necessary from a legal perspective to ratify changes in compensation, but also from a practical perspective to facilitate the implementation process.

**Mitigation:** Local Union leaders and members have been deeply involved in the development of this initiative from the outset. No less than five focus groups of CTA members were assembled early in the project, and a teacher advisory group was convened every two weeks to vet proposals. This collaborative effort has allowed the district to reach this stage with strong Union support, as evidenced by the CTA-signed memorandum of understanding. In addition, CTA President Jean Clements is a nationally known Union leader and strongly supports this plan. However, the district understands that some teachers might be hesitant about these large-scale changes. HCPS is committed to frequent and intense communications to keep all teachers apprised of the plan and progress, and to heavily engage classroom teachers in the design of initiatives, measures of effectiveness, and roll-out plans.

**Risk #6:** Difficulty coordinating and sequencing related initiatives.

**Challenges / Implications:** Several initiatives are interdependent—e.g., implementation of the new compensation plan depends on having a robust, properly field-tested evaluation system—and it will take significant cross-functional coordination to ensure that delays or difficulties in one initiative do not adversely impact the others.

**Mitigation:** The district's implementation plans include the establishment of a Project Management Office to coordinate and track the design and implementation of all initiatives. The Superintendent and her staff will also be tasked with managing overall coordination between the initiatives in regular project update meetings. In addition, the culture of the district and its senior leadership team is to operate in a highly collaborative, high-functioning manner.

**Risk #7:** Design flaws lead to difficulties implementing initiatives.

**Challenges / Implications:** This project will affect almost every aspect of district operations and therefore it is impossible to predict all potential consequences. Theoretical assumptions or projections may not be practically feasible and may lead to implementation issues or challenges.

**Mitigation:** In designing the broad aspects of each initiative, the district regularly consulted the experts sponsored by the Gates Foundation as well as other education-focused consulting firms. In each case, designs that have been implemented were prioritized over theoretical ideas. Still, design challenges will emerge. As outlined in the "Lessons Learned" section, the district will closely monitor implementation milestones and key outcomes on an ongoing basis. If initiatives begin to run off course due to design flaws, this will be captured by our reporting and oversight processes and the district will be well-prepared to make course corrections.

## **SUSTAINABILITY**

As the 8<sup>th</sup> largest district in the nation, with an annual budget to match its size, sustainability planning to fund district priorities is a routine and deeply entrenched practice. While the proposed budget is ambitious, the district's strong commitment of district dollars (around half of the entire project budget), both during the project and ongoing, is clear. All ongoing costs are either funded by the district, or funded in an increasing percentage each year (Y1=5%, Y2=15%, Y3=40%, Y4=60%, Y5=80%) that will guarantee sustainability at the end of five years.