Indicators of Excellence Evaluation Tool

Administrator Evaluation: Postings and Assurances

Non-State Approved Evaluation Tool—District Approved Evaluation Tool

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

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

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

The Indicators of Excellence Evaluation Tool relies on data to document that leaders are annually improving across several key areas. Most notably, student achievement; enrollment, retention and attendance; compliance; and managing the budget are unique data points for charter school leaders. In a sense, school leaders are CEOs of their organization because charter school leaders have control over their budgets, the people responsible for maintaining 100% compliance with their authorizers and the MDE, as well as the performance of the school staff. The CS Partners/MEP Services' tool uses the Walton Foundation's guide to constructing performance measures[3], to inform the structure and format of the evaluation process as school leaders set goals within the Indicators.

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[1] Lezotte, L., McKee-Snyder, K. (2011) *What effective schools do: Re-envisioning the correlates.* Bloomington, IN: Solution Tree Press.
[2] Marzano, R.J., Waters, T., & McNulty, B. (2005*). School leadership that works: From research to results.* Alexandria, VA: Association for Supervision and Curriculum Development.

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

Over many years of refining and growing as an education service provider in Michigan, MEP Services' embrace of school reform and choice as its mission has resulted in looking beyond just best practices in schools. The literature on that is deep, but the failure rate is alarmingly high. Because of this, and the fact that charter school leaders have a remarkably different role to play than a traditional public school leader, MEP Services looks to successful business, organizational, and leadership strategies to empower its leaders, and by extension their staff, to build positive, collaborative and dynamic school communities. For instance, the category of "Innovation" in the Indicators of Excellence Evaluation Tool is an opportunity for leaders to document their progress toward school reform and in becoming a successful, unique choice in their local community. Training for leaders in how to achieve this is provided through the study, analysis, and evaluation of Mark Murphy's work on hiring, evaluation, compensation, and work culture[4]; the study of motivation from Dan Pink[5]; and the importance of effective strategic planning from Simon Sinek.[6]

Embedded in all of the aspects of the Indicators of Excellence Evaluation Tool is current research on school reform from TNTP (formerly The New Teacher Project)[7], the Walton Foundation's research on school success and leadership,[8] and the Gates Foundation Measures of Effective Teaching[9] multi-year research project that identifies the qualities of effective teaching as well as the organizational structures necessary in schools to promote teacher retention and student success. Research funded by the Education Trust[10] also informed the Indicators of Excellence Evaluation Tool by providing clear distinctions between the beliefs and practices of the most successful leaders, particularly in high poverty schools, and less successful leaders across the country. Finally, research from New Leaders[11] on how great leaders develop teachers, manage talent, and provide a great place to work rounds out the research that informs each aspect of the Indicators of Excellence Evaluation Tool.

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

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

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

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

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

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

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

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

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

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

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

Laura Moellering earned both her bachelor's degree in Secondary Education in English and Psychology, and her master's degree in Curriculum and Instruction from Eastern Michigan University. In addition to having been a high school classroom teacher and school leader, Laura currently works with school boards to determine how to best implement their vision and how to keep core values at the center of school practice and decision-making. She also co-designs and leads an annual Leaders Academy for school leadership teams across MEP Services where current research is studied and leaders have an opportunity to work with colleagues from different schools to share ideas and expertise. Laura has written curriculum and education programs, and has trained leaders and teachers in how to make those a reality in their school.

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

several new charter schools. Fred has deep knowledge of leadership, building effective leadership teams, and has presented at several national conferences.

Evidence

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Reliability

The reliability of the Indicators of Excellence Evaluation Tool is grounded in the use of research from Robert Marzano and Lawrence Lezotte. Multiple observations, trainings, and the evaluation of pre-defined evidence and goals for that evidence lead to a reliable tool that is accurate in evaluating the effectiveness of school leaders in different settings and at different levels of experience.

Validity

Because the Indicators Evaluation Tool is clear in its definitions of what a successful school will look like in whichever stage of development it is in, the tool is designed to measure the effectiveness of a charter school leader accurately. Additionally, the format of the tools implementation with embedded training, mentoring, and conferencing defines success for the charter school leader in Michigan.

Efficacy

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

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

Indicators of Excellence School Leader Evaluation

Student Achievement

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

Highly Effective	Effective	Minimally Effective	Ineffective
The highly effective leader has a school where student growth and achievement are continuously improving. In addition to the work of the effective leader, this leader is particularly focused on sub-groups and makes sure that all students, including special education, gifted and talented, and economically disadvantaged students are all growing in equal measure. The highly effective leader engages staff in analyzing student data and in seeking solutions for weaknesses through the use of study groups, and monitoring the effects of efforts on student achievement.	The effective leader creates a culture around student achievement that includes regular analysis of student data that goes beyond standardized assessments to include reflection on student success in unit plans. This leader involves all staff in discussions of student learning and achievement and collectively owning the success of the school. In this school, teachers work with one another to share their successes and are provided with opportunities to lead upon showing success. The leader identifies students at-risk of learning failure and monitors student attendance.	The minimally effective leader cannot sustain student growth over time and is reluctant to make significant decisions with regard to teacher effectiveness. This leader does not communicate a sense of urgency with regard to maximizing student learning and does not advise teachers on how to improve student learning. Data is used inconsistently in this school and teachers do not feel that they have control over student results or how they will be evaluated with regard to achievement.	The ineffective leader does not use data consistently with teachers and is poorly equipped to understand and use data to inform discussion. The ineffective leader does not make explicit connections between student achievement and attendance, the use of resources, classroom culture, or instructional methodology to provide teachers with the support needed to improve. Initiatives that are begun are quickly forgotten and teachers look at new efforts as just another new thing that will be discarded in a short time.

Student Enrollment and Retention

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

Highly Effective	Effective	Minimally Effective	Ineffective
The highly effective leader has built a culture around student retention that recognizes that families that feel they are heard and valued and whose children are well cared for and learning will not leave their school unless their life circumstances change. The highly effective leader employs tools and processes that help all school staff understand their role in creating an environment where not only do students and families stay, but that there is a high community desire to attend their school.	The effective leader has a procedure in place that has capable and responsible people managing re-enrollment that results in clear enrollment numbers by early spring. The effective leader runs enrollment early and keeps new families engaged up until the start of school. The effective leader does not try to be all things to all people, but instead communicates the vision and mission of the school so that students and families appreciate and understand the school.	The minimally effective leader accepts convenient excuses from families instead of being reflective about the reasons families are leaving. The minimally effective leader designs procedures for re-enrollment and enrollment that do not respect families or communicate low-expectations to families and staff about how and why decisions are made about what school to attend.	The ineffective leader retains less than 60% of students and does not accept responsibility for student mobility. An ineffective leader accepts anecdotal reasons without trying to establish the actual reasons.

Balanced Budget

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

Highly Effective	**Effective**	**Minimally Effective**	**Ineffective**
The highly effective leader works with the Board of Directors to identify areas of need and dedicate funds to those areas. This leader seeks to solve problems through analysis and in doing what is best for students. He or she doesn't "throw people at problems" and operates as leanly as possible while compensating individuals competitively and commensurate with the value they bring to the school. This leader brings stakeholders into budget conversations in a way that helps everyone understand budget limitations as well as opportunities.	The effective leader plans the budget in conjunction with the board and HR Specialist and maintains spending within categories throughout the year. To be effective, this leader would work with the board to identify the strategic use of funds to improve student learning in innovative and creative ways.	The minimally effective leader is reactive and does not make decisions based on student needs. He or she does not give programs time or support to work and makes expensive changes quickly. This leader struggles making the right decisions when budget revisions are required. The minimally effective leader spends into fund balance and does not have a sustainable plan in place to prevent that from occurring again.	The ineffective leader does not adequately consult with their budget when committing to purchases or increases in salaries or staffing resulting in budget issues. The ineffective leader does not have adequate oversight over the approval of and use of POs or other purchasing system.

Rules and Compliance

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

Highly Effective	Effective	Minimally Effective	Ineffective
The highly effective leader avails his or herself of the resources available outside of and within their school to complete all compliance requirements in a timely fashion. This leader uses compliance activities to continuously reflect on and improve academy operations. The highly effective leader does not have a top-heavy administrative staff to complete compliance items.	The effective leader monitors the compliance calendar and employs staff to complete tasks in a timely fashion. This leader delegates but at times is unsure of what the result is. The effective leader responds quickly to requests for information or documentation and knows how to prioritize compliance activities as they relate to the whole of academy operations and needs.	The minimally effective leader misses or is unresponsive to deadlines. This leader promises to have work completed but frequently misses these deadlines. The minimally effective leader fails to put the right amount of resources into compliance matters—either having too many people working on a single project or too few.	The ineffective leader misses important submission deadlines and is not responsive to reminders or requests. This leader struggles to find balance in getting academy compliance work done in conjunction with everyday events and is often pulled off task.

Innovation

Charter schools provide an opportunity to enact educational reform in a way that is innovative and creative to best meet the needs of students. Innovation occurs when a school honors the whole child by creating practices that respect the fact that all children will learn when the environment accounts for the intellectual, social, emotional, developmental, and physical needs of each student.

Highly Effective	Effective	Minimally Effective	Ineffective
The highly effective leader understands the schools' mission deeply and the purpose of having a charter school in their community. He or she makes decisions based on serving the needs of the students who attend the school and helps staff understand the mission and why their school is not just a different choice in their community, but a better one. The highly effective leader can easily distinguish between practices and procedures that are designed for students and those that are designed for adult convenience. This leader is imaginative in constructing a school unlike the local school while still working within the rules.	The effective leader understands the "why" of the school and communicates this to all stakeholders. He or she shapes what they do and how they do it around that "why." This leader is regularly engaged in analyzing school practices for their contribution to the overall goal of student learning and does research on potential changes and other innovative schools when it appears it is a good fit for their school community. The effective, innovative leader does not view rules and compliance as roadblocks and seeks help from others if they have a great idea that will advance learning.	The minimally effective leader is not reflective about the "why" of the school. He or she does not evaluate the practices of the school as supporting the mission of the school or as being necessary. The minimally effective leader fails to see how school can be done differently and hides behind the belief that regulations require all schools to behave and look similar to one another.	The ineffective leader fails to understand the mission of their school or the purpose of charter schools in general. He or she does not recognize when others subscribe to actions or practices that are intended to punish or blame children for failures.

Process

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

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

Training

School Leaders are provided annual training in regards to the use, expectations and effectiveness of this tool.