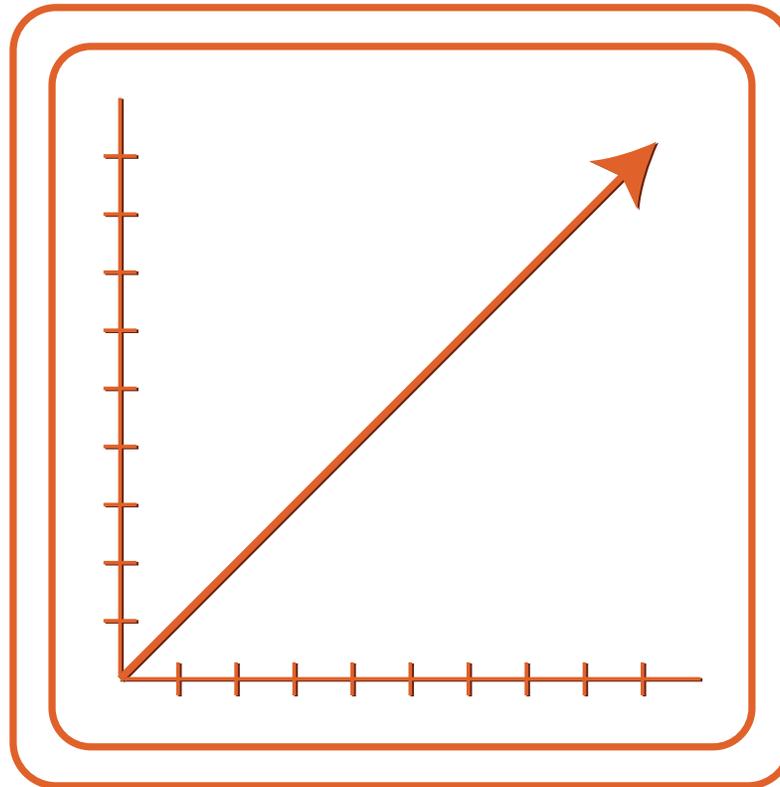


MIDDLE SCHOOL MATTERS

INSTITUTE



Self-Assessment: Performance Management



Middle School Matters Institute
An initiative of the George W. Bush Institute in partnership with
The Meadows Center for Preventing Educational Risk

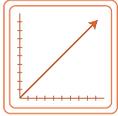


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ABOUT THE SELF-ASSESSMENT



Before developing specific implementation goals, educators must take stock of which research-based practices are already in place and which practices are lacking or need improvement. This template guides users through a self-reflection process for **performance management** practices implemented school wide. Users should follow these steps for **each principle**.

INSTRUCTIONS

Step 1: Convene a Middle School Matters Leadership team and set aside 1-2 hours for the self-assessment.

Step 2: Gather all available data (see page 4).

Step 3: Assess current instructional practices, using data gathered in step 2, and indicate which instructional traits are implemented:
a) consistently, b) inconsistently, or c) not at all.

Consult the MSM Field Guide for more information:

https://greatmiddleschools.org/wp-content/uploads/2016/06/5_FieldGuide_Chapter_3_July19.pdf

Step 4: Summarize assessment results and determine the level of implementation according to the rubric (adapted from Fixsen, Naoom, Blase, Friedman, & Wallace, 2005).

- 1. No Implementation:** No evidence of implementation.
- 2. Exploration:** Willingness to implement, but little to no evidence of actual implementation. May be in planning stage.
- 3. Initial Implementation:** Evidence indicates that implementation has begun but is largely inconsistent.
- 4. Full Implementation:** Strong evidence of implementation of all or most of the traits and practices.
- 5. Sustainability:** Strong evidence of implementation with processes in place for continued implementation in the future.

NEXT STEPS: GOAL SETTING AND ACTION PLANNING

After conducting this self-assessment, select a few key principles to focus on for the upcoming school year. Using the MSMI Action Plan Template (<https://greatmiddleschools.org/msmi-implementation-and-action-plan-templates/>), develop measurable goals with specific action steps and deadlines for each chosen principle.

Self-Assessment: Performance Management

Date: _____ School _____ District _____

Participating team members: _____

SOURCES OF DATA:

STUDENT PERFORMANCE DATA

- Attendance data
- Discipline referral data
- Course passing rates for ELA, math, science, and social studies
- Student assessment data
- Student work samples

PROGRAM DATA

- School vision, mission, and goals
- Campus improvement plan
- Data use plan
- Data team roster
- Data team meeting attendance records and agendas
- Data directory
- Data system usage reports
- Common planning time structures and sample agendas
- Professional development schedule
- Professional development attendance records and agendas

Principle 1: Establish and communicate a strong commitment to evidence-based decision making.

Consistently	Inconsistently	Not at All	Practice 1: The principal establishes a school wide data team with ongoing responsibility for promoting and ensuring effective data use.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	a) There is a school wide data team that includes a variety of stakeholders with the responsibility for promoting and ensuring effective data use.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	b) The data team models how to improve student performance through data-informed instructional decisions.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	c) The data team shares responsibility among administrators, teachers, and staff to employ a data inquiry cycle. The inquiry cycle includes asking questions, sharing ideas, and making decisions to improve instruction and learning.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	d) School leadership leverages existing ties among staff, networks, and central actors to create a successful data use culture.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	e) School leadership works to first build the capacity of data usage within their own network (e.g. assistant principals, counselors, instructional coaches).
Consistently	Inconsistently	Not at All	Practice 2: Develop a data-use plan that articulates activities, roles, and responsibilities.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	a) School leadership assesses the current status of their data use to identify which key elements are in place and which are missing (see Field Guide, page C-7 for more information).
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	b) The school data team has developed a data-use plan that articulates activities, roles, and responsibilities.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	c) The data-use plan identifies the types of data and frequency of review to document progress toward goals.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	d) The data plan links data to actions or strategies to be implemented and a process to determine the need for interventions.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	e) The data plan is attainable and measureable and takes into account school-specific culture and constraints.

Principle 1: Establish and communicate a strong commitment to evidence-based decision making.

Consistently	Inconsistently	Not at All	Practice 2: Develop a data-use plan that articulates activities, roles, and responsibilities.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	f) The data plan is reviewed and revised annually based on the changing needs of the students and school.
Consistently	Inconsistently	Not at All	Practice 3: Develop common understanding of key terminology among all data users.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	a) There is an adopted common vocabulary for discussing and using data to reduce misunderstanding and improve implementation (e.g., definitions for words such as "achievement," "evidence," and "intervention").
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	b) A data directory is maintained that includes information about which departments collect and maintain different types of data, when data are reported, and descriptions of each type of data.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	c) The school data team reviews the definitions of key terminology to ensure common understanding of words, goals, and data.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	d) School leaders use the key terminology with teachers and staff consistently, checking for understanding and encouraging others to do the same.
Insert Total	Insert Total	Insert Total	Current Level of Implementation
_____	_____	_____	<input type="checkbox"/> Level 1: No Implementation <input type="checkbox"/> Level 2: Exploration <input type="checkbox"/> Level 3: Initial Implementation <input type="checkbox"/> Level 4: Full Implementation <input type="checkbox"/> Level 5: Sustainability

Principle 2: Identify and monitor indicators aligned with campus goals.

Consistently	Inconsistently	Not at All	Practice 1: Review lagging data to determine performance goals.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	a) The data team reviews historical performance to gain an understanding of where success has been achieved and where challenges continue to surface.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	b) Shared performance goals are created for the entire school.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	c) Teachers personalize shared goals by looking at lagging data for their own students.
Consistently	Inconsistently	Not at All	Practice 2: Determine indicators for measuring progress toward goals.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	a) Once goals are clearly defined for improvement, the data team determines a set of indicators to systematically measure progress toward meeting these goals.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	b) The indicators selected are simple and understandable, show a trend, allow for economical data collection, are timely, and are sensitive to change.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	c) There is a defined process for developing performance indicators and supporting metrics to identify and add new metrics as changes occur or new issues surface.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	d) The process for developing indicators includes considering what issue or goal the indicator must address and conducting a review of research supporting potential related indicators.
Consistently	Inconsistently	Not at All	Practice 3: Establish targets for indicators based on school goals.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	a) Baseline data are established for selected indicators to identify current status on the indicator and to set performance targets.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	b) Performance targets are realistic, near-term targets that align with annual district and campus goals.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	c) Intermediate targets are set when the gap between the baseline and the goal is large.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	d) All performance targets are communicated to all staff members and are available for review within any campus performance management dashboard.

Principle 2: Identify and monitor indicators aligned with campus goals.

Insert Total	Insert Total	Insert Total	Current Level of Implementation
_____	_____	_____	<input type="checkbox"/> Level 1: No Implementation <input type="checkbox"/> Level 2: Exploration <input type="checkbox"/> Level 3: Initial Implementation <input type="checkbox"/> Level 4: Full Implementation <input type="checkbox"/> Level 5: Sustainability

Principle 3: Guide and support teachers in the use of data to meet the needs of students and to support them in reaching their goals.

Consistently	Inconsistently	Not at All	Practice 1: Provide targeted professional development and ongoing data support.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	a) Targeted professional development is provided to all staff members in the use of data to drive decisions that improve student and school performance.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	b) Professional development focuses on use of data that involves an open discussion about possible root causes of poor performance and potential solutions, rather than being accountability and compliance focused.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	c) Professional development includes a common language around indicators, what they measure, and how they will be acted upon.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	d) Honest dialogue occurs between teachers, administrators, parents, and other stakeholders to develop an understanding of each person's role in meeting targets and overall goals.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	e) Through example and support, the data team develops the capacity of the entire school community to use data to drive decision making.
Consistently	Inconsistently	Not at All	Practice 2: Designate a school-based facilitator who meets with teachers to discuss data.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	a) The school principal designates a data facilitator or coach to provide a systematic way for teachers to use data to inform instructional decisions.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	b) The data facilitator increases the capacity of teachers to use data to identify student needs and develop appropriate action plans.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	c) The data facilitator models how to use data to gauge progress toward learning goals and making data-driven instructional decisions.

Principle 3: Guide and support teachers in the use of data to meet the needs of students and to support them in reaching their goals.

Consistently	Inconsistently	Not at All	Practice 3: Dedicate structured time for staff collaboration.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	a) There is structured time for teachers to collaborate with one another to analyze data, practice interpreting and understanding changes and trends in data, and make progress towards goals.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	b) Meeting times are structured so that teachers and facilitators: <ol style="list-style-type: none"> 1. Come prepared with data 2. Have time to think about teaching and learning and test their theories with the data 3. Conclude with practical data-based action steps they can take in the classroom to improve learning and reach goals
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	c) Implementation of the action steps and their associated outcomes are monitored by leadership to promote accountability.
Consistently	Inconsistently	Not at All	Practice 4: Organize and prepare a variety of data about students and student learning.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	a) Teachers examine student work across content areas (within team or grade level) and across teachers (within department) to learn about differences in teacher expectations, content covered in other classes, and variances in student understanding.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	b) Benchmark or interim assessment data are collected and analyzed to monitor progress and inform instructional decisions.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	c) A variety of other data about students is collected: demographic data, attendance and behavior data, perception data from questionnaires and surveys, and school process data (e.g., instructional practices).
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	d) Intersections of data are reviewed to answer questions and to learn from a variety of data (e.g., analyzing demographic data and student learning data determine whether different student groups perform differently on the same learning measure).

Principle 3: Guide and support teachers in the use of data to meet the needs of students and to support them in reaching their goals.

Consistently	Inconsistently	Not at All	Practice 5: Interpret data and develop theories about how to improve student learning.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	a) Teachers examine data to identify strengths and weakness of each class. This information is used to prioritize time and make instructional decisions.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	b) Data are triangulated from multiple indicators to inform theories about student learning patterns (e.g., attendance, course grades, and behavior data are used to design a summer intervention for at-risk students).
Consistently	Inconsistently	Not at All	Practice 6: Modify instruction to test theories and increase student learning.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	a) After reviewing data, teachers change instruction to test hypotheses and increase student learning (e.g., changing time allocations, identifying students for interventions, vertically aligning curriculums).
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	b) Teachers change groupings of students for instruction and activities based on a review of data (e.g., create learning groups based on student-level data, individualize assignments, create peer tutoring pairs).
Insert Total	Insert Total	Insert Total	Current Level of Implementation
_____	_____	_____	<input type="checkbox"/> Level 1: No Implementation <input type="checkbox"/> Level 2: Exploration <input type="checkbox"/> Level 3: Initial Implementation <input type="checkbox"/> Level 4: Full Implementation <input type="checkbox"/> Level 5: Sustainability

Principle 4: Guide and support parents and students to stay on track to postsecondary success by selecting goals and monitoring their progress towards those goals.

Consistently	Inconsistently	Not at All	Practice 1: Explain expectations and assessment criteria.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	a) Students are taught to look at data to understand their own performance, set goals for learning, and monitor progress toward those goals.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	b) Teachers set expectations for student performance by creating explicit, individual goals for learning and connect them to the student's personal goals.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	c) Assessments are aligned with long-term performance goals so that student progress can be monitored throughout the academic year.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	d) Schools provide students with user friendly reports of their progress toward learning goals.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	e) Teachers and school leaders hold discussions with students and parents centered on these data reports allowing for progress to be monitored, strengths and weaknesses to be identified, and plans to be set for achieving goals.
Consistently	Inconsistently	Not at All	Practice 2: Provide feedback to students that is timely, specific, well formatted, and constructive.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	a) Students receive both affirmative and corrective feedback from teachers and other adults in a timely manner to allow for student improvement.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	b) Feedback is specific and includes concrete information and examples so that students know what and how to improve.
Consistently	Inconsistently	Not at All	Practice 3: Provide tools that help students learn from feedback.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	a) Students are provided opportunities to respond to feedback (e.g., correcting items, answering a list of questions).
Consistently	Inconsistently	Not at All	Practice 4: Use students' data analyses to guide instructional changes.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	a) Using data, individual students or classes identify instructional areas in need of review.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	b) Teachers use this information to plan lessons that target students' needs and motivate learning.

Principle 4: Guide and support parents and students to stay on track to postsecondary success by selecting goals and monitoring their progress towards those goals.

_____	_____	_____	<input type="checkbox"/> Level 1: No Implementation
			<input type="checkbox"/> Level 2: Exploration
			<input type="checkbox"/> Level 3: Initial Implementation
			<input type="checkbox"/> Level 4: Full Implementation
			<input type="checkbox"/> Level 5: Sustainability

Principle 5: Ensure that school-level and student data needs are incorporated into districtwide data management system planning and implementation.

Consistently	Inconsistently	Not at All	Practice 1: Involve a variety of stakeholders in defining user requirements for the system.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	a) Administrators, counselors, information technology staff, support staff, teachers, parents, and students are included in the discussion of selecting a data system to meet their different needs.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	b) The school has a data team that is made up of stakeholders that effectively represents the data needs of these stakeholders and informs the school principal and district administration about data needs on an ongoing basis, rather than just when selecting a new data system.
Consistently	Inconsistently	Not at All	Practice 2: Plan and implement a data system.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	a) School leaders and the data team work closely with the district personnel or other individuals responsible for implementing the data system to ensure all potential users have appropriate access and training.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	b) A campus-specific plan is in place that addresses the rollout of the data system, including its purpose and role in supporting the campus goals.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	c) The campus-specific plan addresses professional development for all staff who will have access to the data.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	d) There are clearly defined roles and responsibilities for users of the data.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	e) There are opportunities for ongoing support and technical assistance as users become familiar with the data system.

Principle 5: Ensure that school-level and student data needs are incorporated into districtwide data management system planning and implementation.

Insert Total	Insert Total	Insert Total	Current Level of Implementation
_____	_____	_____	<input type="checkbox"/> Level 1: No Implementation <input type="checkbox"/> Level 2: Exploration <input type="checkbox"/> Level 3: Initial Implementation <input type="checkbox"/> Level 4: Full Implementation <input type="checkbox"/> Level 5: Sustainability