

REDACTED VERSION

Illinois Partnership Zone: Lead Partner Narrative Proposal and Cost Proposal Redacted

Illinois State Board of Education

Resubmitted: February 11, 2010

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**Illinois Partnership Zone
Technical Proposal
Lead Partner**

Illinois State Board of Education

November 2009

Authorized Officials

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4134_11/09

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Executive Summary

Education “is the civil rights issue of our generation, and it is the one sure path to a more equal, fair and just society.” —Arne Duncan, December 16, 2008

The Elementary and Secondary Education Act of 2001 brought education to the forefront of civil rights in a way that had not been done since *Brown v. Board of Education* (1954). The achievement of students in poverty, minority students, special education students, and students with limited English skills is now held to the same accountability. No excuses are acceptable for disparity in achievement among groups of students. Despite its flaws, the No Child Left Behind Act was a turning point in American education. Many schools and districts have made improvements in students’ academic achievement over the past decade, but for many it has continued to be business as usual. With a new administration and new economic support, the charge is even greater to ensure that students are prepared for the challenges of the 21st century in a global economy. Schools, districts, and states must respond and this requires comprehensive and supported school turnaround.

Learning Point Associates is an established and successful not-for-profit education consulting firm. With over 25 years of experience serving states, districts, and schools, we apply our deep knowledge and expertise to effectively employ research based strategies and concepts to schools who are chronically underperforming. Our work in partnership with our clients yields demonstrable results. We directly employ over 160 staff to work in our focus areas of Teacher and Leader Quality, District and School Improvement, Expanded Learning and Literacy, and Data Analytics. Our services and resources align directly with the needs of schools designated for turnaround. Our strength lies not only in our expertise and knowledge, but also in our ability to work with teachers and leaders to garner support and commitment for lasting change in a building—as this is often the largest barrier to sustained change. We understand the importance of the school’s relationship to the district, state, and community, and we know how to navigate these relationships for optimal results for schools. Our recent work, most notably in New York, has directly contributed to improving NCLB status in several school districts over the past 5 years.

We do not take this work lightly and recognize that the size and magnitude of this challenge warrants bringing critical partners to the table. We maintain a broad network of partners with expertise in a variety of areas ranging from direct instructional support to district financial management. We approach this work with two primary partners, Pivot Learning and Strategic Learning Initiatives, and anticipate working with others through the course of the turnaround effort. Strategic Learning Initiatives brings to the table experienced teacher and leader coaches, and a comprehensive instructional model with demonstrated effectiveness in 10 Chicago Public Schools. Pivot Learning brings innovative approaches to finance alignment at the school and district level that have received national attention.

Our turnaround approach, focused on collaborative development and implementation of turnaround strategies will dramatically improve students’ achievement and build the capacity of school leaders and staff to sustain the advancements in school climate and culture, teacher and leader effectiveness, and community and parent engagement. Our turnaround design starts with a

research-based set of diagnostic tools as the foundation for a comprehensive needs assessment that determines how our work proceeds in all of the critical focus areas. We engage stakeholder in this process, set benchmarks, and regularly monitor and communicate results.

Our turnaround design has the following six components:

- A core **school leadership team** established immediately that is coached and trained to sustain the interventions
- A research-based **diagnostic needs assessment** that serves as the foundation to engage staff and tailor interventions, with tools that can be used for ongoing progress monitoring
- A **instructional model** that engages teachers in daily review of student data and weekly collaboration with other teachers on instruction
- A three-tiered **parent and community engagement approach** that includes a School Partnership Council, a family support coordinator, and targeted training for parents
- An overlay **of tools and expert coaching** in the areas of teacher and leader evaluation, management, operations, governance, and resource allocation to ensure the school can successfully operate in the context of the district and state
- Additional **targeted interventions** as identified from the needs assessment such as support in curriculum alignment, the development of curricular supports for teachers, and integrated instruction for special needs populations

School Leadership Team

Our approach involves creating both a core and expanded turnaround team within the school charged with direct responsibility for the reform effort. School building leaders, teachers, coaches and mentors, students, parents and community members, and district leadership are members of this team with designated roles and responsibilities because we know that they are the group ultimately responsible for implementing and sustaining lasting improvements. The core building leadership team meets weekly to focus on the improvement efforts. The expanded team comes together bi-annually to review progress, although members will be engaged in a variety of activities throughout the year.

Diagnostic Needs Assessment

Our comprehensive needs assessment and planning process results in the development of systemic and systematic interventions. We conduct interviews, observations, focus groups, and surveys to gather a picture of what is happening in the school. We engage key stakeholders in understanding the data and the urgency of the school's situation. It serves as the "wake-up or shake-up" that a turnaround school needs to jumpstart a radical transformation of culture and performance.

Our needs assessment includes a systematic audit of the administrative, governance, and management practices in a school to ensure that time, resources, and human capital are effectively deployed as well as integrated and leveraged for efficiency. Our framework provides the stepwise process by which we identify gaps in cohesion and integration and this becomes a tool for monitoring progress and meeting goals. We have strong expertise in conducting both

needs assessments and strategy development for our district partners, as evidenced in helping districts such as Yonkers, New York, and Elkhart, Indiana, improve student achievement and state accountability status.

Instructional Model

Learning Point Associates and our partners in school turnaround focus on engagement as a centerpiece for successful reform. Quality relationships between students and teachers center on focused instructional strategies that enable students to master state standards and learning objectives. Strategic Learning Initiatives (SLI) utilizes an instructional intervention model, Focused Instruction Process (FIP), that yields dramatic gains. Teachers and leaders learn how to identify and use the right student, classroom, and school data to drive and monitor reform. Cardenas Elementary in the Little Village neighborhood of Chicago was the most improved Chicago elementary school in 2007–08, according to the Illinois Standards and Achievement Test composite scores. The previous year, this distinction was held by another SLI school, Willa Cather Elementary. The FIP process, based on a theory of engagement, used by these schools has also demonstrated effectiveness in high schools around the country and will be the primary instructional intervention strategy for school turnaround.

Parent and Community Engagement

Parents and community groups are involved from the onset in the needs assessment. In addition, we have three mechanisms to ensure ongoing engagement. First, a School Partnership Council, made up of members from families, community groups, and local businesses and nonprofits will meet on a quarterly basis to help guide and support the development and implementation of activities and resources to facilitate positive community and parent engagement in the school. Second, a full-time, noncertified position of family support coordinator will help to facilitate the School Partnership Council, connect with civic and business groups as well as parents, and coordinate the implementation of workshops for parents and local agencies to help support turnaround strategies and communicate a culture of high expectations for students. Finally, Learning Point Associates and SLI will offer a series of workshops for parents and community members on both instructional content and school transition (Pre-K, high school).

Tools and Expert Coaching

We know that great leaders and teachers are at the core of great schools. Learning Point Associates federally funded National Comprehensive Center for Teacher Quality is a national leader in educator effectiveness. We build on the research and best practice of this Center to implement principal and teacher professional development institutes. This work includes coaches and mentors who work directly with the principals and teachers to build their instructional and classroom management strategies, as well as identify technology-based and other resources that can enhance the work they do. We employ tools such as the QS-LID, the Survey of Enacted Curriculum, and the Walk’ Bout tool that can be easily and inexpensively used in an ongoing capacity to monitor progress. We work to affect changes across the areas of instructional quality, working conditions, resource allocation, and teacher and leader evaluation systems, all central components to improving teacher and leader effectiveness.

Targeted Interventions

From our experience, we know that in addition to the core functions identified, schools often need supplemental support in the areas of curriculum alignment, the development of curricular supports, and integrated instruction for special education and ELL students. Some schools may also need more in-depth support in the areas of teacher compensation, the development of afterschool programs, or other areas unique to their school. Learning Point Associates, SLI, and Pivot Learning Partners will look to our staff and consultants to provide basic supports in these areas, but we also have a network of other nationally known organizations with expertise in these areas. Where appropriate, we will work with the district/school to develop contracts with these organizations for the work they need, ensuring they are in alignment with the overall goals of the school turnaround strategy.

Ensuring Success

Accountability, responsibility and monitoring are critical components of ensuring that the reform efforts move forward. They are also a mechanism for identifying barriers and challenges to meet them head on or make necessary course adjustments. Measurable indicators for success are defined, benchmarks are delineated and data is collected and used to routinely gauge progress. School leadership teams build their knowledge about and capacity to use data for driving decisions and monitoring their work.

As the primary partner, Learning Point Associates will coordinate services to schools ensuring alignment of strategies and programs, keeping those that are effective and eliminating those that are not. We have experience at managing complex projects and operations with multiple stakeholders, priorities, and implementation barriers. We have federally approved approaches to accounting, budgeting, and financial management and are solidly positioned to fulfill operating and reporting requirements.

And, while many providers can demonstrate short term gains in low performing schools, often these are not sustainable because of the lack of acknowledgement of the broader context. We know that context is critical, and we will work diligently with our schools to ensure they have the supports needed both within and outside of the building to achieve long term success.

Throughout this proposal, we demonstrate how Learning Point Associates, Strategic Learning Initiatives, Pivot Learning, and supporting partners will engage schools across Illinois in a process to close the achievement gaps and transform the learning that takes place.

Service Area and Capacity Limitations

Learning Point Associates and its support partners, Strategic Learning Initiatives and Pivot Learning Partners, are able to work with schools and districts in each of the 10 regions of Illinois. Our combined capacity is limited to intervention implementation in no more than three districts and a total of nine schools in the first year of implementation. In subsequent years, however, we would be able to add schools and districts. We believe that a network of schools from the same district or region would best serve the needs of the schools in developing local partnerships, engaging district support, and establishing a collaborative approach to school transformation with other schools. This network approach is especially important in the coordination of elementary and secondary feeder-school patterns where the success of one schools is, in many ways, dependent on the success of the schools along the PK–12 continuum. This local or regional network approach also would allow for economies of scale in terms of professional development for teachers and school leadership teams. Priority will be given to schools seeking to develop a network approach to school transformation and/or schools within the same student-feeder patterns, be they in the same district or in adjacent districts. In order to implement some of the strategic professional development initiatives, autonomy in structuring teacher planning time, schedules, and assignments may need to be granted by the district and local teacher contract. Additional autonomy will need to be granted in order to create the teacher leadership positions required for implementation.

Work Plan

1. Needs Assessment

Our experience suggests that a comprehensive needs assessment is critical for school and district transformation. Often, outside consultants or members from a state agency conduct short quality visits to schools and report back on the necessary areas of improvement. In reality, schools often do not buy in to these recommendations, and changes do not occur. For school turnaround to take place, the existing (or new) principal, staff, and other stakeholders need to understand the current conditions and have a clear picture of what success will look like. A comprehensive needs assessment is a critical first step to getting stakeholders from across the school community to understand the urgency and buy in to a course of dramatic change. In addition, it provides baseline data that can be used not only to measure improvements, but throughout, to identify critical change levers.

Through numerous years of assisting schools and districts in auditing their written, taught, and tested curriculum, Learning Point Associates has developed a comprehensive approach to assessing the needs of schools to improve student achievement. Centralized on what students are expected to know and be able to do as well as the supports provided to teachers that will enable them to ensure that students meet high expectations, our approach to systems needs assessment is designed to provide both qualitative and quantitative data on the health and coherence of the school. Learning Point Associates knows from research that student achievement is primarily a function of educator quality, curriculum, instruction, and assessment at the school level as well as parent and community engagement.

Our needs assessment will examine the alignment of curriculum, instruction, and assessment as well as professional development, staffing, culture/climate, the learning environment, and data through the multiple lenses of data collection and analysis. We also will examine the alignment of financial resources to instructional priority areas. The process proposed is a collaborative one, intended to generate findings in concert with school participants to help schools overcome their individual barriers to success. As such, school-level findings are not an end in themselves but rather a starting point for facilitating conversations to identify probable causes and areas for improvement, and to generate a specific, actionable plan to realize specific gains in achievement over a one- to five-year period.

The framework for a typical Learning Point Associates needs assessment includes the following four phases:

- **Phase 1: Planning.** Planning the implementation of the needs assessment in concert with school partners.
- **Phase 2: Data Collection and Analysis.** Rigorously collecting and analyzing extant and new data from multiple sources to address the guiding questions.
- **Phase 3: Co-InterpretationSM.** Co-interpreting findings while maintaining final responsibility for recommendations.

- **Phase 4: Action Planning.** Supporting the use of the findings and recommendations in action planning through strong processes and structures, substantial relevant resources, and highly expert facilitators.

Theory of Action

Student academic achievement is directly impacted by what students are learning in the classroom. As such, primary foci of needs assessment are three instructional areas: the curriculum, instructional strategies and resources, and assessments of student learning—all of which are in the domain of the teacher and his or her classroom. Learning Point Associates recognizes that the classroom is part of a larger system and that effective curriculum, instruction, and assessment are guided and supported within the school and by the school and district through policies, resources, leadership, and supervision. The guiding questions of our investigation follow.

1. To what extent does the learning environment promote high expectations and student achievement?
[REDACTED]
[REDACTED]
[REDACTED]
2. To what extent is a comprehensive, clearly articulated, and aligned curriculum guiding instruction across the school?
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
3. How does instruction focus on the effective delivery of the curriculum?
[REDACTED]
[REDACTED]
[REDACTED]

[REDACTED]
[REDACTED]
4. What academic interventions are available for students who need additional academic support?
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
5. To what extent are parents and the broader community involved in supporting the provision of learning opportunities and experiences for students?
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
6. What professional learning opportunities that support instruction and learning are provided to teachers?
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
7. To what extent do student-achievement data (formative as well as summative) inform academic programming, planning, and instruction?
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

8. What staffing practices and profiles are utilized to effectively support teaching and learning across the school?
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
9. To what extent are financial resources aligned to priority areas of improvement?
[REDACTED]
[REDACTED]
[REDACTED]

Phase 1: Planning

Phase 1 is the convening of local school teams to review objectives, inform stakeholders (district and school staff, parents, and community members), and collaboratively determine team roles, communications plan, and data collection logistics. This phase will include conversations with the stakeholders, not only about the needs-assessment component of the work but also about the school transformation at large. Our experience suggests that early engagement of stakeholders is critical for gaining their longer term commitment.

Consultants from Learning Point Associates will facilitate the needs assessment with a school liaison to be identified during Phase 1. This school liaison might be the incoming or current principal or other member of the school leadership team. Although this liaison will help to coordinate the logistics of data collection and communication, experience has taught us that working with a school steering committee or leadership team allows for a comprehensive and effective needs assessment process. School steering committees and Learning Point Associates teams will work together on tasks in processes designed to couple completion of the assessments with the building of strong, trusting relationships.

Learning Point Associates staff and consultants are highly skilled in the use of team processes that build trust while ensuring the rigor of the work at hand. Focusing on the work without addressing the need for trust compromises the efficiency of the process and the power of its results.

Phase 2: Data Collection and Analysis

Phase 2 consists of rigorously collecting and analyzing extant and new data from multiple sources to address the guiding questions described previously.

During Phase 2, Learning Point Associates staff and consultants work closely with school staff to collect and begin analysis of the data required to inform the needs assessment. During Phase 2, initial analysis and preliminary recommendations will surface for the teams' consideration—which, in turn, will trigger revisions of the data collection plan if necessary to answer pertinent questions. Preliminary analysis and fine tuning compose the typical approach that Learning Point Associates uses with clients in all aspects of data collection and improvement planning, and this approach reflects the complexity of the context for each school. We have learned through our previous experience conducting this process that data collection and analysis require some level of customization to appropriately address the unique characteristics and circumstances of each school. Customization avoids a “cookie-cutter” approach, which may negatively impact improvement planning. (More details about the structure of these initial data reviews and related opportunities for the revision of data collection appear in the Phase 3: Co-Interpretation section.) In addition, Learning Point Associates will work with each school to enact a materials collection, observation, survey, and interview plan to ultimately reflect a picture of whole school needs. The components of data collection are state and local student-achievement data sets, the stakeholder survey, classroom observations, school-level interviews, the educator survey, the *Surveys of Enacted Curriculum* (SEC), key documents review and curriculum alignment, and stakeholder focus groups. Reports from each component are referred to as data sets and are described below.

Student-Achievement Data

The highest profile data set for any needs assessment of a school or district is student-achievement data. The guiding questions for the needs assessment call for a rigorous examination of multiple pieces of qualitative data that impact student achievement, and the Learning Point Associates needs assessment carries that examination to the next logical step by triangulating schools' state and local achievement data (summative and formative) with the other forms of extant data. This collection serves to both set a performance baseline and provide a comparative point for postintervention assessment.

Our collection methods for student achievement data are flexible. Learning Point Associates has the capacity to work with school data/information technology personnel to collect relevant achievement data reports from a school or district's centralized data warehouse or, in the absence of such personnel and/or data warehouse, to collect raw data and generate custom reports.

Characteristics of Successful Schools Survey

In a school or district striving to maintain success, stakeholders need to have a clear picture of current needs and a plan for designing improvements. School improvement leaders and teachers use perception data to learn about current strengths and needs from staff, students, parents, and various community members. Perception data is most effective when used in conjunction with

other types of data to guide school and community leaders to the most complete and effective means of achieving and sustaining improvement efforts.

To collect perceptions data, it is necessary to have an easy-to-use method of gathering information from large numbers of various stakeholders. The Characteristics of Successful Schools survey tool will help collect and analyze perceptions data quickly and easily to facilitate the data-driven decision-making process by capturing information for use by educational leadership and school turnaround teams.

As an element of a recurrent and intentional use of data, perceptions data can do the following:

- Advise leadership about the opinions and thoughts of school and community stakeholders for use in evaluating overall climate.
- Inform the process of analyzing achievement and other types of data for a complete look at the school or district.
- Build relationships with the community, which fosters loyalty to the school.
- Assess longitudinal progress for implemented strategies.
- Contribute to a richer picture of the actual and perceived classroom climate.
- Influence how content is taught to students.
- Affect how communication is approached with the different stakeholders.
- Impact strategies implemented to improve the classroom environment.

The purpose of the Characteristics of Successful Schools (CSS) survey is to address the need to analyze and use different types of data beyond achievement data in school improvement planning. After using CSS to survey the school and district community, users can compare the results from different groups of stakeholders. By developing an understanding of the district or school climate, new strategies around maintaining or improving the climate and relationships with various stakeholders can be undertaken. This increased climate awareness could positively impact student perceptions and performance.

SEC

The *Surveys of Enacted Curriculum* (SEC), designed for Grades K–12 in English language arts, mathematics, science, and social studies, is a powerful tool that includes a Web-based survey taken by teachers and provides data on both the instructional content being taught in the classroom and the cognitive expectations being placed on the student when learning this content.

The Web-based teacher survey responses are mapped against the state content standards and assessments. The scales and maps generated by the SEC allow administrators to analyze, measure, and refine the content taught in the classroom. Analyses are presented across grade levels and schools to identify gaps and duplications in curriculum and instruction that may adversely affect student performance.

The SEC enables district and school leaders to do the following:

- **See** the content being taught in the classroom.
- **Explore** the degree of alignment between what is being taught and the state standards.
- Better **understand** the instructional strategies being used in the classroom and **examine** how they align with best practices and research findings.
- **Provide** focus for dialogue in professional learning communities.
- **Guide** professional development efforts and **monitor** the impact on classroom practice.
- **Predict** how students will perform on local or state assessments.

The SEC surveys and data analysis services being offered were developed through the Council of Chief State School Officers (CCSSO) State Collaborative on Assessment and Student Standards on SEC, and through research and development conducted by Porter and Smithson at the Wisconsin Center for Education Research. The surveys are based on state and national standards for content and teaching. Teachers participating in the surveys report on a full school year of teaching in English language arts, mathematics, science, or social studies. The data are analyzed and reported using predesigned and tested charts and graphs found to be accessible and useful to educators as well as researchers.

The SEC has been used in 34 states across the nation and is available for English language arts, mathematics, science, and social studies. Learning Point Associates has a cooperative agreement with CCSSO and WCER to be the professional development provider for SEC work.

As previously noted, all teachers within the school in the targeted subject area(s) will be asked to take the SEC. Teacher data showing the alignment of classroom instruction to state standards and assessments will be aggregated at the school and grade levels and presented at co-interpretation. In addition, representatives from the steering committee will be provided with professional development, allowing them to access and utilize their school's SEC data in an ongoing way.

SEC data will be used up-front in the needs assessment, but also at the end of each year of implementation as a measure of progress.

Classroom Observations

For general education classroom observations, Learning Point Associates will utilize the CLASS observation protocol, a nationally validated research-based instrument developed at the University of Virginia. This protocol assesses multiple dimensions of teaching that are linked to student achievement and social development, across three broad domains of classroom quality: instructional support, classroom organization, and emotional support. The protocol is differentiated for use at either the elementary or secondary level, with a focus on adolescent engagement strategies at the secondary level.

Educator Interviews

To garner local context and perceptual data concerning the alignment of the written, taught, and tested curriculum, Learning Point Associates will engage school personnel in semistructured

interviews. These interviews will be based on protocols that are designed to be approximately 30–40 minutes in length for teachers (allowing interviews to take place within the confines of a single class period) and 60 minutes or more in length for principals and instructional specialists. The protocols will be developed to specifically address the guiding questions and to be comparable across the different types of interviews. As a result, the protocols cover the same topics from the perspective of respondents whose responsibilities and roles vary.

Classroom teachers interviewed will be randomly selected to ensure a mix of new and veteran teacher perspectives and equal distribution across grade levels. The number of classroom teachers interviewed in each school will vary by school size [REDACTED]

[REDACTED]
[REDACTED]
[REDACTED]

Human Capital Management Survey

As a complement to the interview, all teachers and school leaders will be asked to complete a survey on human capital management indicators. Learning Point Associates developed its Human Capital Management Survey based on its METworksSM research-based framework. The METworks framework describes research-based best practices for teachers and school leaders in eight areas of human capital management in education—preparation, recruitment, hiring, induction, professional development, compensation and incentives, working conditions and performance management—as well as the interconnections among these components. The research in the METworks framework serves as the basis for the questions in the Human Capital Management Survey.

Document Review and Curriculum Alignment

Our document review will examine the school’s improvement plan as well as the following curriculum-specific documents [REDACTED]

[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

These curriculum support documents will be analyzed against a rubric based on what the literature indicates is reflective of high-performing schools, whereas the improvement plan will provide background and context for the report that will be prepared for co-interpretation.

In addition, school and district budget documents and associated policies will be reviewed to assess the level of budgetary alignment with school needs.

Investigating Subgroup Issues. To highlight issues specific to the education of students with disabilities and ELLs across the school, Learning Point Associates will partner with subcontractors who bring special expertise in each of these fields. The subgroup components of the school needs assessment will not stand alone as separate projects but will feature an integrated overlap of focus areas, guiding questions, data collection protocols (including sharing of data among analysis teams), analyses, and reporting mechanisms between and among the partners. This approach will enhance the depth of data collection and reporting while providing cost savings and efficiencies of scale to the state and school partners.

ISBE Parent Involvement Analysis Tool. In addition to the data sources described, school data from the Parent Involvement Analysis Tool, developed for ISBE by the Academic Development Institute, will be incorporated into the needs assessment process and the co-interpretation phase. This tool provides the school with a self-assessment inventory of parent involvement related policies and practices that could enhance school improvement efforts.

Stakeholder Concept Mapping

A series of focus groups involving representative samples of parents, students, business members, government service representatives, and youth and community service organizations will be conducted. In order to ensure that the full domain of relevant stakeholders associated with the school community are represented, an effort will be made to collect ethnographic data on the programs in the school community that are focused on student and adult learning and/or the provision of social services. Programs and services will be identified and reviewed against a set of questions or criteria to generate data about such things as access, opportunity, content, quality, resource allocation, and perceived and quantifiable measures of impact.

Focus group participants will be engaged in creating a school community concept map. The process of creating a school community concept map will serve both (a) to identify the domain of learning opportunities and experiences representatives from key stakeholders groups consider to be of greatest import and (b) to prioritize which opportunities and experiences should be further cultivated and developed within the confines of the school community. The concept-mapping process allows focus group participants to engage in activities and conversations

[REDACTED]

The concept maps built with stakeholders will provide a snapshot of the school community and a vision of possibilities for excellence and growth. This process provides opportunities for all participants to collectively generate new ideas and possibilities for consideration. The information derived from this effort will help us determine which representatives from the broader school community should be represented in the next phase of the needs assessment. The concept map will stand alongside other data collection results during the co-interpretation process.

While the amount of data may seem overwhelming at first, these data serve as the baseline for school performance as we move through the turnaround process. Student achievement, of course, is our ultimate measure, but these other measures help us to determine, throughout the course of the turnaround, where change is needed to affect results.

Phase 3: Co-Interpretation

The purpose of co-interpretation is to interpret the needs-assessment data in a collaborative group setting in order to generate buy-in and to focus on the priority areas of transformation.

Learning Point Associates has found that careful co-planning of data collection and analysis along with collaborative data collection typically results in relatively easy interpretation of findings. We work carefully with clients to collect data against the theory of action together with the guiding questions, so that even the most distressing of resulting problem descriptions are accepted by school teams as valid and reliable information. Contrast this approach with the common experience of an outside entity conducting data collection and analysis and reporting findings; such work typically is rejected out-of-hand by those closest to the situation.

The Learning Point Associates approach combines rigor with transparency of effort and results in acceptance of the outcomes by schools. If Learning Point Associates conducts Phases 1 and 2 as described, the work of Phase 3 will articulate leverage points for improvements across the seven areas of the needs assessment. Furthermore, the execution of the communications plan described in Phase 1 results in a “no-surprises” situation with staff and community members who are not directly involved in the needs assessment. By keeping all stakeholders apprised of the work as it develops, school teams will bring others along in the process and will be able to help them come to shared conclusions about the data.

The co-interpretation process consists of several steps, starting with the interpretation of the data within individual data sets, followed by the identification of key findings across data sets, and concluding with the identification of district strengths and potential restraining forces that may be brought to bear on the issues facing the school. These steps occur during a two-day co-interpretation conference with key school and district staff. Because this process is critical in identifying the priority areas for district improvement, the detailed approach is outlined here.

Interpretation of the Data

The co-interpretation process begins with the study of the individual data reports (i.e., student-achievement data, document review, curriculum alignment, interview data, SEC data, classroom observations, parent and community focus group, and concept mapping) in a small-group setting.

Individual groups are asked to select the findings from their data report(s) that they believe are most significant and then to categorize those findings according to one of the topic areas addressed by the guiding questions: learning environment, curriculum and assessment, instruction, academics supports for students, community engagement, professional learning opportunities, staffing, and alignment of financial resources.

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]


[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]



Following the co-interpretation process, Learning Point Associates and partners will develop specific research-based strategies to augment the core instructional model. These recommendations will be the basis for the collaborative action-planning process.

Phase 4: Action Planning

Each school will participate in the final phase of the process—completing a three-year action plan to implement the recommendations in the reports. This phase supports the use of the findings and recommendations in action planning through strong processes and structures, substantial relevant resources, and highly expert facilitators.

The final phase of the process requires translation of data and interpretations into action plans that can drive school improvement. Learning Point Associates uses the data and interpretations as well as the relationships and trust developed in Phases 1–3 to bring teams through the development of action plans with measurable milestones. Learning Point Associates brings years of experience as well as evidence-based research to the planning process.

In the action-planning phase, team membership will be augmented with school specialists as needed. For example, should a need for particular attention to developing professional learning communities to promote teacher collaboration and job-embedded professional development emerge during the needs assessment, a consultant at Learning Point Associates or one of our partner organizations with experience in the planning and implementation of such models will be added to the team. It is essential that school staff who will be primarily responsible for enacting the improvement plans be engaged in the development of those plans. Failure to do so opens the door to resistance, lack of understanding, team ignorance of additional information that can inform plans, and similar unnecessary obstacles. The Learning Point Associates facilitators will accelerate the incorporation of these new team members by providing additional mentoring during the initial plan development phase.

Action plans, generated by school personnel with support from Learning Point Associates, will address all recommendations that emerged from the needs assessment discovery process, as well as all the turnaround requirements determined by ISBE. In addition, plans will attach priorities, timelines, and measures to plan elements, as dictated by the data collected and analyzed in Phases 1–3. Plans also will identify resources needed for their execution.

Learning Point Associates has worked in a number of sites to develop action plans that include the following:

- Implementation strategies
- Alignment of efforts to improve curriculum, instruction, and assessment while addressing the need for leadership development, professional development planning, and resource allocation
- Efforts to ensure that plans are free of bias and address the needs of all students
- Related monitoring and evaluation of plan implementation

- Ways to engage all stakeholders
- Budgetary and other resource requirements of the plan
- Alignment with policy and legal requirements

Perhaps the greatest strength of Learning Point Associates as an external partner lies in our ability to provide a customized array of supports and technical assistance in the action-planning phase to best support local needs. We have learned from conducting past needs assessments that although the expected offering at this stage is a facilitated action-planning process to help school planning committees articulate their plans, oftentimes a school needs something more. In this case, Learning Point Associates will use the results of the improvement plan to implement the intervention.

We work closely with our partner schools to identify the assistance that would benefit them most, seeking to provide, wherever possible, those supports that would be difficult to obtain through other channels. Following are examples of services we have provided in the past in the context of a needs assessment:

- Hands-on, 2½-day facilitated coplanning sessions with experts in one or more of the following areas:
 - Budgeting and finance requirements
 - Literacy or mathematics
 - Curriculum development
 - Strategies for working with ELLs
 - Strategies for working with students with disabilities
 - Development of professional learning communities
- Additional research, background, or implementation strategies relevant to specific issues (whether or not those issues were highlighted in the school’s final report)
- SEC trainers to work with teachers, principals, and/or school administrators on accessing and understanding their survey data
- Hands-on support in reviewing/correlating additional data sources (e.g., item analysis from state tests) against key findings or goals, or in refining action-plan concepts
- Assistance in developing inquiry teams to consider data and student achievement
- Ongoing coaching for coordinators and/or teams on the planning process

The assessment of the school academic and community engagement needs will provide the foundation for intervention work. The resulting key findings, recommendations, and action plan will be used to guide the school leadership time in turning around the school climate, educator quality, and ultimately the academic achievement of students. This highly collaborative process has a side benefit of modeling for the school community a process for positive investigation of school needs and collaborative action planning, thereby building the capacity of the school

leadership team and the school community at large to sustain the school through the turnaround process.

2. Community Involvement and Engagement

Our Capacity

The work of Learning Point Associates work at the national, state and district levels has helped schools build stronger and more vibrant partnerships with community organizations. At the national level, we have worked closely with the U.S. Department of Education on the expansion and development of the 21st Century Community Learning Centers (21st CCLC) program to bring stronger community organization awareness to the availability of this federal funding source, and the opportunities to partner with schools and districts. At the state level, our work with the Illinois State Board of Education implementing the 21st CCLC at the state level has focused on raising awareness of funds, building stronger and more sustainable partnerships, and involving key stakeholders to bring a rich breadth of community partners and stakeholders to help leverage resources already available in communities to schools, and to build a stronger coalition of support for schools.

We have worked closely at the local level with Chicago Public Schools as they have developed their Community Schools Initiative (CSI) over the past nine years. The CSI model is based on creating holistic support for students and their families in close partnership with schools—offering health services, expanded learning, and afterschool opportunities as well as providing a resource coordinator to help manage and strengthen the variety of partnerships with schools. Learning Point Associates has been the lead professional development provider for the CSI, providing training and technical assistance on building stronger partnership coalitions to provide a greater variety of activities for students and their families, establishing and nurturing stakeholder and partner oversight communities, and creating stronger community support for school improvement efforts. The goal of this work has been to broaden the lens of partnership and engagement with key stakeholders, whether they are parents/families or family-serving organizations, youth-serving organizations, local community development organizations, community agencies, law and health organizations, or arts groups, to name a few.

In our work developing *Beyond the Bell: A Toolkit for Creating Effective Afterschool Programs*, Learning Point Associates developed several surveys to help schools gauge climate, parent and student needs and interests, and staff interests. We have helped schools determine whether the use of surveys is effective, or if a series of focus groups might be the better tool to get at deeper discussions of school climate and student and family needs. Our work over the years providing technical assistance to schools has taught us that staff, parents, and students often view surveys as “tests” and try to provide answers they think the administration wants to hear, rather than a true reflection of the interests and concerns stakeholders may have. Our staff has worked closely with school staff to look at data to create key questions that engender critical discussion points in focus groups. For example, in a high school environment, we looked at attendance patterns, dropout rates, school and community violence data, employment, demographics, and mobility rates to get a stronger picture of the community the school served and the needs the school felt it was capable of addressing. From there, we were able to hone in on critical questions to ask staff,

parents, and the students to determine what additional opportunities might build a stronger sense of community and caring. According to a community schools model, providing for critical needs of students and their families (health and safety, in particular) helps build a stronger, less mobile community.

Our Plan

Learning Point Associates has a long history of working with clients to assess needs and implement improvements for positive change. Although the school is the direct client for this proposal, the impact and support of the community will be an integral aspect of any school turnaround initiative. Beginning with the initial needs assessment and concept mapping, key community support providers, local business representatives, and parent advocacy members will be asked to participate in these processes, leading up to and including action planning. In order to ensure that the full domain of relevant stakeholders associated with the school community are represented, an effort will be made to collect ethnographic data on the programs in the school community that are focused on student and adult learning and/or the provision of social services. Programs and services will be identified and reviewed against a set of questions or criteria to generate data about such things as access, opportunity, content, quality, resource allocation, and perceived and quantifiable measures of impact.

To facilitate the continued involvement of parents and community stakeholders, we propose several structures and strategies to support high-quality community and parent engagement.

School Partnership Council. During action planning, key stakeholders identified through the needs assessment will be asked to participate along with teachers and school leadership in designing specific goals and strategies focused on student and family support, community connections, and parent involvement. This group will form the School Partnership Council, which will meet on a quarterly basis to review progress on school/community-based goals and strategies. This council also will provide a forum for school leadership and teachers to communicate high expectations for student achievement and behavior as well as gather support for improvement efforts. A key aspect of these quarterly meetings will include the dissemination of information regarding curriculum, assessment, and student expectations for learning. As one of its school support functions, the council will assist the school in identifying and securing additional funding for turnaround strategies. The primary duty of the council will be to help guide and support the development and implementation of activities and resources to facilitate positive community and parent engagement in the school.

Family Support Coordinator. A full-time, noncertified position of family support coordinator will help to facilitate the School Partnership Council, connect with civic and business groups as well as parents, and coordinate the implementation of workshops for parents and local agencies to help support turnaround strategies and communicate a culture of high expectations for students. We have learned that with long-term sustainability in mind, it is preferable to make the coordinator positions paid positions. In the past, some of the program coordinator duties have been added to the existing duties of a school staff person. When parent advocates, community representatives, or teacher aides have been given these duties, we have found that it can be very difficult to integrate these new duties into their already-very-cramped work schedules. Ideally,

this person will be a member of and have strong ties to both the community and the school. Learning Point Associates and SLI will assist the school leadership team in the selection and training of the family support coordinator.

Central to the success of the School Partnership Council and the family support coordinator are the expertise and leadership of Strategic Learning Initiatives. As part of its core approach, SLI has long engaged community members and parents in the improvement efforts of their client schools. For three consecutive years, the SLI parent engagement team earned the National Organization Award from the National Network of Partnership Schools (NNPS); SLI also was honored to have several staff articles published in the NNPS journal, *Promising Partnership Practices*.

Parent Workshops in Literacy, Mathematics, and School Success. SLI's Parent Engagement Program focuses on building school, family, and community partnerships by strengthening the connection between parents and caregivers and their children's learning through offering educational, interactive workshops. This approach supports the idea that parents and caregivers are a child's first teachers. Statistics prove that when parents are involved in their children's education, children will succeed.

The SLI program focuses on teaching parents how to become more involved in and more supportive of their children's learning. The SLI model, which has won three national awards from Johns Hopkins University, encourages parents to understand that home is a place of learning—and that parents have a vital role in helping their children be better prepared for school and become better learners. The Parent Engagement Program equips parents and caregivers with knowledge, strategies, and tools that enable them to perform effectively in assisting their children and others.

Parents are recruited into the program by a variety of methods including sending flyers home with students, advertising the workshops within the entire school via posters, personal/direct invitations to parents/caregivers, and phone calls. Participation rates tend to be higher when schools participate in the program voluntarily. In addition, the participation rate is higher when school principals and the rest of the school community are committed to the workshop program. SLI has successfully offered incentives to parents directly (e.g., "bring in another parent to receive a free gift") through promotions conducted within the school to build excitement among parents and caregivers and to increase the all-important and very positive word-of-mouth that this program generates.

A cornerstone of SLI's work in parent/caregiver engagement is that its workshops are interactive, offer easily applied and practical education, and are very hands-on. SLI offers a series of annual participatory hands-on educational workshops for parents, teaching them strategies and methods they can use at home with their children to develop students' understanding of concepts and skills. Parents are encouraged to model learning as a continuous process, and this is crucial in fostering a lifelong love of learning in their children. With topics ranging from reading and math games and nurturing positive self-esteem to helping with science fair projects, the SLI workshops give parents useful and effective tools that strengthen learning for the whole family. These tools help to build leaders in the home and deepen the relationship between parent and

child. SLI also builds leaders in the schools by training parents to lead the workshops and coordinate ongoing parent involvement.

The train-the-trainer program component of the parent engagement model develops and strengthens the skills of the family support coordinator, who will be trained in facilitation and leadership skills as well as recruitment techniques. These acquired skills, in turn, serve to underscore the importance of parent and caregiver involvement, reinforcing a primary goal of the program. To ensure that the goals of parent and caregiver involvement are met, SLI uses a variety of tools and tactics such as sharing research articles that reinforce lifetime success of students whose parents/caregivers participate in their education and providing examples of the six types of desirable involvement (namely, parenting skills, communication, volunteering, learning at home, decision making, and collaborating with the broader school community). The SLI parent engagement model is designed to train parents through a three-year cycle of workshops. Parents also are trained as presenters for the following workshops:

- Years 1–7 workshops
 - Training in leadership skills (e.g., communication, team work, parent involvement)
 - Facilitation skills (e.g., speaking in public, cooperative grouping techniques, facilitating effective workshops)
 - Recruitment techniques (how to effectively market and recruit for the program)
 - Participants are trained to facilitate one workshop or an activity in one workshop. This foundation is built upon during each subsequent year.
- Years 2–8 workshops
 - A refresher on skills learned the first year
 - The refresher leads to enabling participants to facilitate three different workshops in literacy and mathematics, with clear and intentional articulation of the Illinois State Curricula standards.
- Years 3–8 workshops
 - How to facilitate five of six workshops and create a plan for Year 4
 - Based on participants' readiness, they will facilitate one of the workshops at another school involved in the program.

After completing three years in the program, participants are able to facilitate workshops and train others to facilitate the same, using a toolkit of training activities, tools, strategies, and workshops.

Pre-K Provider Workshops and Information. In order to support the transition from preschool and home day care to kindergarten, workshops on school readiness and child development may be conducted for parents of preschool students and preschool care providers. Similar to the parent workshops, these sessions held at the school help to inform early childhood providers with the critical information and support they need in preparing young children for kindergarten. Depending upon the results of the needs assessment and turnaround action planning, these

sessions may include such topics as vocabulary and numeracy development, connections with social services, nutrition, discipline, and preparing children for the transition to kindergarten.

Secondary Transition Workshops and Information. Parent- and student-focused workshops also will be available at the secondary level to help inform parents about the transition from high school to college or work. These sessions may include such topics as making the transition from middle school to high school, financial planning for college, school-to-work program information, helping students achieve high expectations, and adolescent development. The School Partnership Council will be asked to provide guidance for these sessions, as will any local or regional institutions of higher education.

Although the strategies described offer a multifaceted approach to parent and community engagement, Learning Point Associates and SLI recognize that the needs of the school may be broader than what has been described in these foundational pieces. The procurement of additional resources, programs, or partners may need to be secured as a result of the needs assessment and action-planning process. As the Lead Partner for school turnaround, Learning Point Associates will carefully coordinate and oversee any such additions.

3. Intervention Plan

One strength of the turnaround process proposed by Learning Point Associates and SLI lies in its applicability to all school levels. Designed around a coaching process for high-quality use of formative assessment data to monitor student progress and plan instructional interventions, the Focused Instruction Process (FIP) model has demonstrated success, including in elementary and middle schools in Chicago Public Schools and in high schools around the country. As a process rather than a program, there are no significant differences in the implementation of the FIP model among high schools, middle schools, and elementary schools. However, we recognize that elementary and secondary schools require different strategies and approaches to school turnaround.

The basic structure at the elementary school level in which all teachers typically teach literacy and mathematics allows for whole staff engagement in the main subject focus areas of the FIP process. This allows for concentrated effort and a schoolwide, solidified approach to improving student achievement.

At the high school level where teachers are subject-matter experts who are not all engaged in these main focus areas of literacy and mathematics, careful engagement of the entire school staff will be required. The FIP model is not limited in its application to literacy and mathematics; therefore, regardless of subject area, teachers will be able to engage in the same strategies and processes. The focus of this engagement will center on the “discipline literacy” of their content area. For example, the FIP process will focus on the skills and understanding required of students to develop scientific literacy so that they may more fully apply conceptual understanding and knowledge. Additional content expertise may be engaged from the district or other providers to help teachers develop both their own and their students’ content literacy as needed.

At the high school level, the engagement of students in the needs assessment and action planning processes will add a layer of insight into the strategies that will be effective in positively impacting school climate, culture, and engagement. Actively seeking participation by students in the turnaround strategies begins to lay the groundwork for a perspective on students as clients and school and community resources.

In addition to the FIP model, the expertise of Pivot Learning Partners will help to support the work of high school turnaround. In 2005, Pivot Learning Partners (as Springboard Schools) conducted an in-depth study of high-performing, high-poverty California high schools. The report of this study, *Challenged Schools, Remarkable Results: Three Lessons from California's Highest Achieving High Schools*, is online (at www.pivotlearningpartners.org/research.html). In this study, Pivot Learning Partners found that high schools getting the best results follow no single program or model, but instead approach their work with a high level of coherence, focus, and intensity. The three key strategies identified through this research focus on enabling teachers to do their best work in serving challenging populations of students by doing the following:

- 1) Using consistent curriculum and frequent diagnostic tests—giving teachers timely and useful data on who knows what and who needs what.
- 2) Finding and adopting best practices—using proven, research-based strategies instead of asking teachers to develop their own plans in isolation.
- 3) Investing in improvement—spending scarce financial and human resources to provide teachers with opportunities to work together, tools to perform their jobs more efficiently, and coaching on implementation in their classrooms.

Pivot Learning Partners has applied these findings as well as other research-based practices to the development of an intervention and support program for high schools serving high proportions of English language learners (ELLs). This program, Pivot Learning's English Learner Secondary Schools Network, delivers services through a combination of professional development network meetings and site-level coaching with teachers and administrators, taking a systems approach to the improvement of teaching and learning for ELL students. The network features the following key elements:

- **Data.** All teachers, including high school teachers, need to have access to data about the English language development skills of their students, and they need to understand the implications of this data for instruction in their classroom.
- **Schoolwide language pedagogy.** This systemwide effort makes explicit the fact that in these schools all teachers teach ELL students. Pivot Learning Partners teaches the importance of a schoolwide language pedagogy in all classrooms that engages ELL students in listening, speaking, and reading.
- **Ongoing assessment and placement.** Students learning English need to be placed in English language development classes at an appropriate level and reassessed and reassigned as their skills improve.
- **Student voice.** The network helps to empower students in these schools to speak out about their aspirations and their experiences—a powerful catalyst for change.

This perspective to high school turnaround works well with the FIP model in terms of the emphasis on frequent and regular use of diagnostic and formative assessment tools and the collaborative approach to implementation of best practices and strategies for both academic intervention and enrichment.

Student Enrollment Assumptions

The proposed model assumes a student enrollment of approximately 600 students, roughly 20 classrooms for the elementary and middle school grade levels. Because high schools are typically much larger, the model assumes a higher student enrollment rate of approximately 800 students. A majority of the strategies are targeted at working with teachers as grade level or department teams, so fluctuations in student enrollment would not significantly impact the implementation of the various strategies.

In the event that the student population is significantly larger—thus requiring a significantly larger school faculty and leadership team—adjustments to the expansiveness of the needs assessment will need to be made in order to maintain a relative sample size for interviews and observations. The key positions described throughout the intervention model also may be adjusted for significant differences in teacher population. For instance, a very small school may be able to function with a half-time family support coordinator. A very large school may require two FIP coordinators rather than one to provide all teacher teams with adequate coaching and support.

Learning Point Associates and Strategic Learning Initiatives are experienced in elementary, middle, and high schools. Specific approaches for elementary and secondary are listed below. Middle schools will typically implement the secondary strategies; however, some elementary strategies also may be appropriate depending on the grade-level grouping of the school and the configuration of student expectations.

Addressing the Restart Model

A strength of Learning Point Associates is its ability to work with our clients to assess, develop, and implement strategies for improvement in the context of the district, community, and state. We work with our clients rather than provide a formulated set of strategies and recommendations. For this reason, we are not proposing to engage in a “Restart Model” in which we, Learning Point Associates, would be responsible for the closer and reopening of the school. This proposal is designed to work with district leadership in school transformation and turnaround. However, if the district has deemed that a school requires a “restart,” our intervention model would enable the new school leadership and staff to establish a focused approach to instructional intervention and whole school turnaround. We would be eager to work with both the district and the new school leadership and faculty in establishing school goals, strategies, and structures designed for dramatically improved student achievement.

Addressing the Turnaround Criteria

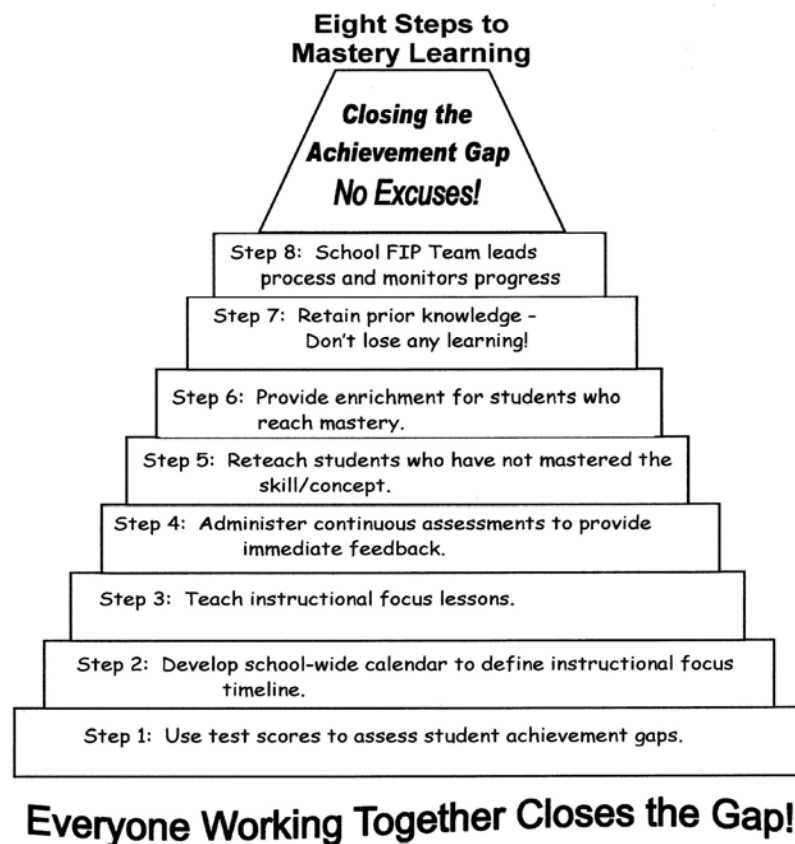
Overview. Learning Point Associates is skilled in assessing systemic needs and working with our clients to design systematic strategies for improvement. Our approach is to work with school and district leaders to effect change. We accomplish this by efficiently and systemically “working the levers” of student achievement to build strategies that enable all students to meet high academic standards. These levers can be seen in the elements of our needs assessment where we critically evaluate the health of the school system through rigorous data collection methods. Curriculum, assessment, professional development, leadership supports, and instructional programs are levers that must be aligned in order for a school to effectively achieve a turnaround in student achievement. We also acknowledge that a significant “shake-up” of school culture is required to jump-start the transformation process. As the Lead Partner for school turnaround, Learning Point Associates will guide school leaders in the integration and alignment of these levers.

While many areas of school change need to be addressed for dramatic, sustainable improvements, research affirms that student-teacher interaction is the pivot point for school turnaround. In order for any school to see improvements in student achievement, significant improvements in the focused interaction of students and teachers must be the central strategy. The Focus Instruction Process is the key strategy for effecting change in classroom instruction. FIP is a research-based strategy designed by classroom teachers. It is based on the highly successful strategies used by schools and businesses that integrate high performance and continuous improvement principles (Sebring, et. al., 2006; Simmons, 2006).

FIP provides teachers, principals, and district staff a powerful framework of new structures and processes for integrating school improvement strategies, which research shows consistently result in significantly improved student achievement. Those strategies are as follows:

- A district and school *vision for rapidly closing the achievement gap* that specifies a process for designing and implementing the support system needed by the schools, based on the Essential Supports for School Improvement (Sebring, Allensworth, Bryk, Easton, & Luppescu, 2006).
- *Shared leadership that empowers teachers and principals* to make decisions in the best interests of their students. This includes a collaborative approach to developing and sharing effective teaching strategies through a schoolwide leadership team, grade-level teams within a school, and a network of 10 neighborhood schools that encourages peer learning and collaboration across schools.
- *An eight-step instructional process* that includes a common instructional calendar across classrooms and schools that keeps administrators, teachers, students and parents aligned, continually improving their strategies and tools, and moving toward the shared goal of accelerating student learning (Davenport & Anderson, 2002). This includes the Eight Steps process in the diagram and *formative assessments* given to students every seven to eight school days that enable teachers to determine who has mastered a skill from the Illinois Standards and who needs additional help.
- Professional development that includes *coaching, modeling, and support* to help teachers and principals implement and continuously improve the instructional process.

- Engaged parents who help their *children learn at home* lessons that reinforce the literacy skills, as defined by the Illinois Standards, being taught as that week’s focus.
- When schools in the same neighborhood voluntarily come together, learn, and share with each other, peer learning has a chance to take root. It is a powerful structure for identifying and scaling up best classroom practice.
- A cross-level *support team* representing district and area leaders, principals, classroom teachers, and outside experts identifies and removes systemic barriers to improving and scaling up the FIP.
- The development of a school culture of trust and collaboration among the key stakeholders, the teachers, parents and administrators is a powerful driver of student achievement (Bryk & Schneider, 2002; Sebring et al., 2006). When there is trust, people work more effectively together and accomplish more in the same amount of time. The diagram below describes the eight steps used in our model.



Source: Davenport and Anderson, 2002; modified, p 47.

As simple as it sounds, these eight steps can have a transformative impact on classroom instruction and student achievement. Embedded in a system that develops and maximizes effective teachers and leaders, dramatic school improvement will be realized through the implementation of the following strategies to meet the criteria of school transformation.

Turnaround Criteria 1. School Culture and Climate

A. Establish a Safe, Orderly Environment. As described in a research summary from the Center for Social and Emotional Education (Cohen, 2009, pp. 1–2):

Safe, caring, participatory and responsive school climate tends to foster great attachment to school as well as providing the optional foundation for social, emotional and academic learning (Blum, et. al., 2002; Osterman, 2000). One of the fundamentally important dimensions of school climate is relational and how “connected” people feel to one another in school. There is a growing body of research that suggests that connectedness is a powerful predictor of adolescent health and academic outcomes (McNeely, et. al., 2002; Whitlock, 2006) and violence prevention (Karcher, 2002a; Karcher, 2002b) and as a protective factor in risky sexual, violence, and drug use behaviors (Catalano, et. al, 2002; Kirby, 2001).

Creating a safe and caring school often produces something of a tightrope for schools to walk. It is imperative that schools address both issues well and review them often to ensure that the school is a haven for the students, a positive working environment for staff, and a welcoming place for families. Learning Point Associates staff have developed these critical skills through our technical assistance experience with the Chicago Community Schools Initiative. We have assisted schools as they have walked through the implementation or revision of their school safety plan.

Through the needs assessment and implementation, we will address several areas related to safety. As necessary, local law enforcement, school staff, students, and community youth support providers will be asked to participate in the development of strategies for creating a safe and positive school climate. The following are elements to consider:

- *Safe passage.* How do students arrive at or return home from school? Are there barriers? Gang routes or patterns which must be addressed? Implementing a review plan with local law enforcement is often a way that schools can ensure that they are addressing safe passage issues outside the block or immediate area of the school’s location. This is also an issue to consider for an expanded day.
- *Safety within the school.* An assessment needs to be made of entry into schools—including vendor deliveries, and particularly alternative entries. A review of how often entries are checked for accessibility needs to be made. If there are security cameras, how often are they checked for workability, or are tapes reviewed?
- *Bullying and other in-school intimidation features.* Is there a solid and consistent way that bullying and intimidation are dealt with? What are the consequences for the reporter of such behavior? Schools need to undertake a review of their policies with a key stakeholder group to ensure that issues they think might be addressed are neither going unchecked, nor worse, providing negative consequences for victims.
- *Consistent behavior management systems.* One strategy might be the development and implementation of a Positive Behavioral Interventions & Support (PBIS) approach. Whether PBIS or another behavior management system, a school needs to clearly address the ladder of intervention it will use and communicate that regularly and often to anyone

who comes into contact with the students—during school, before or after school or extracurricular activities, and with parents. Behavior management is best implemented when it is consistently applied, but often schools look only to their immediate staff. Peer mediation and peace skills programs also engender a better sense of safety and community among students (and staff), regardless of age.

- *Discipline and suspension issues.* Also of critical importance to the safety and climate issue is whether students who are removed from day-to-day contact with other students are provided with an alternative structure that will continue to provide them with an educational experience. Some of the schools we have worked with provide intensive tutoring programs with students who have been removed from the day school environment to keep them on track in their classes and to provide them with additional assistance (a deficit in which often creates the environment for discipline issues).

Learning Point Associates can help schools look at the policies and procedures they have implemented with their leadership group, determine where changes need to be implemented, and help track how those changes are being completed. If a school safety team needs to be implemented, we can assist the school with its planning and facilitation.

While school safety is a critical aspect of a successful school, we also need to look at this through the lens of promoting a welcoming environment. A simple building walk-through with a family team often can point out areas that school staff and administration do not consider as part of building a more welcoming climate. For example, do parents know which is the “main door” for entry? How does the school entry process work? Although schools are rightly concerned with the security of their students at entry points, these entry points also can provide barriers to entry for those unfamiliar with the process and reasoning behind it.

We recommend that a portion of the budget be set aside for each school to make physical improvements that will send a clear message that the learning environment is valued and should be respected. New paint, desks, and hand soap in the restrooms, for example, send a message not only about the environment but also that students are valued.

B. Create a Climate of High Expectations for Success. The typical conversation regarding a climate of high expectations centers on expectations of student achievement and engagement. Although this is critical to school success, the teacher and school leader are the two most influential aspects of student achievement. High expectations for teachers in terms of participation and quality enactment of school turnaround strategies are just beginning steps in creating a climate and culture of high expectations. The Learning Point Associates and SLI turnaround model requires a high level of collaboration among teachers and school leadership. Through this collaboration, collective accountability for student success is emphasized through the public sharing of student achievement results on benchmark and formative assessments and through peer observations of classroom instructional practices.

SLI’s FIP model has an immediate—and once fully implemented, increasingly—positive influence on overall school culture and climate. The transformation is the result of growing a community of learners, both students and adults, in which high expectations are the norm. Continuous learning leads to the continuous improvement of daily work, which then accelerates

closing the achievement gap; developing shared leadership across the levels of the building and the district. SLI has found this to be true in the many Chicago schools we have served (Cardenas, Finkl, Gary, Morton, and Tilton, to name a few) because of the many components of the process that transforms the environment of each school. The following are the primary improvements in school culture and climate:

- Parents and guardians become more involved in their children’s education at home and within the classroom.
- Teachers undergo a transformation in that they communicate and are communicated to more effectively.
- Trust and collaboration between parents and guardians and teachers grow enormously.
- Teachers are easier to retain as a result of the improved environment where students are learning in a way that is measured and reinforced weekly.
- The principal and other administrators also are empowered to communicate better, and they are perceived by parents/guardians and teachers alike to be “part of the solution.”
- Students themselves are transformed in that they experience improved results (many for the first time) and communicate better with their teachers.
- Community members newly activated to be involved in neighboring schools become impassioned about the school’s mission, as do the local businesses providing in-kind contributions and support.

The end result is a far more tightly knit, positive, and safer school culture and community. SLI stands behind this transformation of school culture and climate, and welcomes calling upon its in-school references to corroborate the transformational effects of the FIP process.

C. Articulate the School Mission. In our work with the development of community school and community learning centers, Learning Point Associates has facilitated building a strong and supportive school culture. SLI also has helped to facilitate strong school culture through the mission-driven implementation of the FIP model. Both elementary and high schools undergoing the FIP process share a mission that is based on the following beliefs about effective schools:

- All stakeholders believe that all children can learn—no excuses.
- High expectations for student achievement and behavior are held by all who convey those expectations.
- An instructional leader creates a shared vision among the stakeholders, a focus, and a plan that leads to the success of all.
- Data drive instruction, yielding measurable results, with all stakeholders accountable for the results.

Although a school can articulate a mission of “all students succeeding” or “lifelong learners,” without buy-in from the staff, families, students, or the community, they remain merely words and not a mission that every stakeholder is committed to pursuing. Therefore, process features to understand where those stakeholders are and what specific strategies a school needs to pursue to improve attitude and culture are critical elements to school improvement.

From the beginning of the needs assessment throughout the implementation of the intervention plan and strategies, the school’s mission and high expectations for students will be guideposts. The leadership team will have as a key strategy the articulation of high expectations for students and staff through active engagement and monitoring of intervention strategies, assessments of student progress, and visible actions of accountability. In *Leading Change*, John Kotter describes the importance of articulating a vision of the future picture as a key element in creating transformative change. Through constant communication, careful strategy alignment, and “walking the walk” of accountability, school leaders will model the vision and mission of the school for teachers, parents, staff, and students. In turn, they will ask the entire school faculty to do the same through active agreement and participation in the turnaround strategies and process.

Along with regular and frequent work with grade- and department-level teams, Learning Point Associates and SLI will meet on a regular and frequent basis with the school leadership team to provide technical assistance and coaching. The focus of this coaching will be building the school leadership team’s capacity to initiate, monitor, and evaluate turnaround strategies. Student achievement and engagement data, classroom observations, and frequent communication with teachers will become structured tools for the articulation of the school’s vision, mission, and strategies for turnaround.

D. Mechanisms for Family and Community Engagement. We know that effective family engagement is a cornerstone of a positive environment (Christenson & Sheridan, 2001; Henderson & Berla, 1994). Our extensive work with schools in promoting successful family and community engagement has been to provide to schools tools and strategies that help build support and create better modes of communication and buy-in to the vision of a successful school. In doing so, however, it is critical to determine where parents and the community are to know how a school needs to work on improvement. When the attitudes and awareness are understood, Learning Point Associates can assist the school with determining appropriate strategies that help build a more positive relationship. Adding parent or other family voices to school leadership teams promotes a more formal conduit of conversation, as well as the development of an effective family liaison process. We have found that imbuing the leadership structure with a strong intention of building a partnership with parents builds a much stronger vision and mission. To this end, the structures established in the proposed model in the Community Engagement section of this document—that is, the School Partnership Council, family support coordinator, and parent workshops—provide the initial mechanisms for family and community engagement.

E. Wrap-Around Services for Low-Income Students. The strategic engagement of community-based support providers through the needs assessment and School Partnership Council will help to identify potential community-based wrap-around support services for low-income students. Through the community schools model that we have helped implement, the needs assessment can identify potential community-based lead partner groups who can better address student and family needs. Community-based lead partner groups fall into the following categories:

- *Health or social service agencies:* Health service organizations can provide stronger and more consistent access to important services such as immunizations, dental services,

eyeglasses, and other preventive care, as well as wellness education. Social services agencies can provide counseling, intervention, and social-emotional well-being support.

- *Arts-based organizations:* Research has shown that arts integration can provide more opportunity for hands-on engagement and reflect different learning styles to create more direct student and family engagement and provide critical complementary skills that help build a student's self-efficacy.
- *Youth development organizations:* Organizations such as the YMCA and Boys and Girls Clubs that were created on the cornerstone of a strong base of strong social-emotional wellness can provide strong, project-based learning activities, mentoring or other tutoring services, and recreational activities through the lens of developing resiliency in students and their families.

The partner selected can provide the leadership on coordinating services for students and their families, such as parent workshops and the integration of community-based health and human services into the school building. Regardless of the partner chosen to lead the wrap-around services, however, the leadership team and lead partner, with facilitation by Learning Point Associates, should identify and engage additional partners in their community to provide a comprehensive set of services that encompass each of the areas listed above and identified in the needs survey.

An extended school day is one option for providing additional academic and social supports for students. Although an expanded school day is not a new idea, it does require an expansion of thinking beyond the traditional school day where teachers teach from 8 a.m. to 3 p.m., and then students go home. Preparing students successfully for life requires a partnership of the school, the family, and the community. In this era of accountability, many schools are so focused on accountability and state assessment scores, other critical skill sets become secondary to the educators. As a recent meta-analysis of afterschool programs indicated, even programs that did not focus on academics were still likely to show academic increases if the programs were sequenced, active, focused, and explicit (SAFE) (Durlak & Weissberg, 2008). School administrators need to be able to see how those wrap-around services can provide additional support to students that will help them make academic gains. With coaching from Learning Point Associates and SLI staff, administrators and staff can learn these skills—and learn more successful family and student engagement strategies in the process.

Additional information regarding school climate and culture can be found under Physical Learning Environment on page 57.

Turnaround Criteria 2. Developing Teacher and School Leader Effectiveness

A. Instructional Leadership. The proposed turnaround model is designed to work with a district-identified principal and school administrative team. Although the district may decide to hire a new principal or keep the existing principal, the FIP model does not necessarily require a change of principal, although we know this is likely to be a requirement of the Federal School Improvement Grant. Learning Point Associates has developed the Quality School Leadership Identification (QSL-ID) process and accompanying tools that can help districts select a principal and members of the leadership team. Administrator quality is of the utmost importance to

districts seeking to improve student achievement, but districts often are left to define their own process and create their own hiring tools. The QSL-ID tool and accompanying facilitators guide provide a standardized hiring procedure built from research-based tools that the hiring committee can use to reach a consensus selection of a new school principal.

During the needs assessment and strategy planning sessions, it may become clear that the size of the school and the various management duties of the school principal may dictate that another person serve as the instructional leader of the intervention and teachers. In this event, we will work with the school administrative team to use tools such as the QSL-ID rubric to identify the qualities and strengths needed for instructional leadership in the context of the school setting and assign the role of instructional leader to the most appropriate member of the school leadership team.

While a key administrator will serve as an instructional leader for the implementation, peer coaching and facilitation of teacher development are beneficial in changing classroom practice for positive student engagement and achievement. The identification of a full-time, certified teacher to serve as a turnaround coordinator with primary responsibilities for coaching teachers, leading teacher team meetings, and participating on the school leadership team will help to ensure that teachers have the support needed to implement the intervention model. By working to remove the isolation of the classroom and providing teachers with collaborative assistance on student performance, the turnaround coordinator will provide an additional level of instructional leadership for the school.

We also recognize that principal evaluation must be ongoing, not an activity conducted solely at the onset of this process. The FIP model provides regular data that can be used as a component of the evaluation process. Student assessment scores and teacher evaluations lead us in measuring the effectiveness of the principal. In short, if all aspects of the FIP process are implemented as directed, we guarantee an improvement in the test score results. Getting this result means that the principal is being effective in implementing the FIP process. SLI would work with the school district's principal-evaluation instrument and would provide feedback directly to both the district and the principal regarding the ability of the principal to lead the FIP process effectively and rigorously. Feedback on the principal's effectiveness at implementing the FIP process would include the following criteria:

- *Creates a vision:* working toward a shared understanding of the goals and progress toward their achievement; coordinating curricula, instruction, and assessment; and putting forth high expectations for student achievement by all students
- *Translates the vision into action using the plan, do, check, act process:* working with the school leadership team, emphasizing schoolwide goals and expectations, and ensuring that the school has a strong instructional focus on key skills
- *Creates a supportive environment:* promotes an academically oriented, orderly, and purposeful school climate—a safe and orderly school climate conducive to teaching and learning
- *Knows what is going on in the school:* monitors classroom instruction on a regular basis, meets regularly with the grade-level teams to monitor the instructional

progress of students, uses data to make decisions regarding the student instructional program and teacher effectiveness

- *Acts on knowledge*: intervenes when necessary, makes the hard decisions on staff effectiveness and its impact on student achievement

B. Distributed Leadership. Although a highly effective principal is needed for a strong school transformation, a strong and collaborative leadership team will enable a school to make lasting change for the benefits of students, teachers, and families. The establishment of a school leadership team comprising the principal, assistant principal, turnaround coordinator, and other specialized teacher roles, as well as the family support coordinator will be a key initial step. Starting with the needs assessment, the school leadership team will be involved in the planning for data collection and bringing key stakeholders, including teachers, together for the co-interpretation of the needs assessment as well as action planning.

Some teacher roles will be augmented from the beginning of the process with the identification of a turnaround coordinator to provide peer coaching and support to grade-level or department teams as well as to individual teachers. The results of the Human Capital Management Survey portion of the needs assessment also may indicate other augmented roles such as mentors for early career teachers. During the action planning session, other augmented teacher roles may be developed such as team leads, model classrooms, or other specialized strategy implementation roles.

In the event that the school leadership team has not been identified, we will work with the principal and key district staff to identify key stakeholders to assist with the needs assessment phase as well as participation in planning sessions. Through engagement in the needs assessment and strategy development phases, we will assist the principal in selecting the members of the school leadership team. Typically, leadership teams in both elementary and high school are determined at the school level. Our model requires that the team be representative of all groups within a school. At the elementary level, there would be one person per grade or in a small school (200 or fewer students) one per grade level cluster, (primary, intermediate, and upper), a special education teacher, the reading specialist, and/or the curriculum coordinator. At the high school level, the leadership team would include department heads or a department representative, a special education teacher, specialists, and the principal.

The training and development of this team will be a key strategy whether it is in place prior to or shortly after our engagement with the school in developing a transformation strategy. In order to develop and enhance the skills of the school leadership team and principal who will assume responsibility for the design, implementation and monitoring of the process, SLI will set up a system of regular meetings that promotes/enhances shared leadership across the school and shared responsibility and accountability for meeting the needs of all learners. School leadership team meetings will be held on a weekly basis. The meetings will be led by the principal, school turnaround coordinator, school professional development coordinator, and family support coordinator and will be focused on the implementation of the Plan, Do, Check, Act process. The SLI coach will support the school leadership team during meetings through the coaching and modeling of effective meeting strategies and by asking probing questions regarding school

practices and their impact on teaching and learning at the school. The use of quality tools will be emphasized during the meetings.

C. Evaluations Based on Student Growth. As Lead Partner, Learning Point Associates would work closely with the participating school districts and schools to establish a high-quality performance management system for teachers that includes both formative and summative components to identify effective teachers, enhance or improve effective instruction, and consider where ineffective teaching may be hindering student improvement.

Through work for the National Comprehensive Center for Teacher Quality (TQ Center), staff at Learning Point Associates have been engaged for the past several years in efforts around defining and measuring teacher effectiveness (e.g., see Goe & Crofts, 2009; Little, Goe, & Bell, 2009). Learning Point Associates staff would use this experience and expertise as part of the support for participating districts looking to improve or revise this important component of the teacher's career continuum and the overall approach to managing educator talent.

Please refer to our supporting partner proposal for details on how we can work with a district to fully implement this type of support.

D. High-Quality, Job-Embedded Professional Development. The professional development to be provided would fall into three categories.

Professional Development for Principals. Learning Point Associates and SLI will provide professional development, modeling, and coaching for the school leadership team. We also will assist the school principal in effective team building, action planning, standards-based instruction, using data to drive rigorous student instruction, building a professional learning community, and working with parents and the community in order to create shared responsibility for school and student success. Initially, the school principal will receive one day of professional development focused on the FIP process at the onset, which will provide an overview of the process, the strategies and tools for leading change, and the professional development that will be implemented with the school leadership team. This initial professional development will enable the school principal to assume an active leadership role in the three-day school leadership team professional development that follows. There will be an additional two to four days of targeted professional development with the principal in other areas as needed including budgeting, community engagement, and school culture/climate.

School principals also will participate in two professional development sessions per year facilitated by SLI shared leadership coaches. These professional development sessions will be designed to meet the needs of the participating schools and principals. In addition, coaching and tools on other aspects of the turnaround will be provided on an as-needed basis by designated coaches from Learning Point Associates and Pivot Learning Partners. For example, Pivot Learning coaches will implement the Resource Allocation tool, which allows principals to build their budget beginning with improvement goals rather than past history or categorical program requirements. Creating a zero-based budgeting model, the resulting budget can be compared with the current one to identify areas of misalignment and to pinpoint specific spending priorities, and

generate a plan to adjust and realign the budget to better match academic and site-level goals. The tool also enables multifunding options for particular strategies.

Professional Development for School Leadership Teams. School leadership teams will receive three days of professional development and program planning assistance in the spring/summer of the year preceding implementation of the process. Professional development will include Effective School Research (Lezotte, Edmonds, Brookover), Total Quality Management (Deming), Essential Supports (Chicago Consortium on School Research), Plan-Do-Check-Act (Shewhart), Quality Tools Training, and the Focused Instruction strategies. This professional development is designed to sharpen the skills of school leadership team members as they assume their roles at the local school.

As noted previously, school leadership team meetings will be held on a weekly basis. The strategic initiatives leadership coach will support the school leadership team during meetings through the coaching and modeling of effective meeting strategies and by asking probing questions regarding school practices and their impact on teaching and learning at the school. The use of quality tools will be emphasized during the meetings.

The school leadership team will participate in process checks with other schools in the network on a quarterly basis. These process checks are designed to share successful teaching strategies, problem-solve process challenges, and plan next steps in the improvement of student learning.

Ongoing support of the principals and the school leadership team will be provided by the shared leadership coaches. Based on the school's needs assessment and intervention plan, professional development is provided on an ongoing basis throughout the school year. High school and elementary would operate in the same manner in terms of leadership.

Professional Development for Teachers. The professional development that teachers experience during FIP provides them new strategies and tools. The FIP process is largely organic in terms of a teacher's professional development. Each of the eight steps of the process empowers teachers to communicate better with their students, with parents and guardians, with other teachers, and with district-level officials. It is a cumulative effect of establishing truly shared leadership within a school.

More specifically, the FIP process begins with a four-day training period whereby teachers learn how to incorporate the eight steps of the process into their reading curriculum. Teachers transfer information to students through the standards-based FIP focus lesson. Through the focus lesson step, 13 skills are highlighted that allow students a vehicle for navigating and comprehending text in a meaningful way. As the process begins to unfold, improved teaching results in improved learning, which leads to continuous improvement of daily work. The final results are what every teacher strives for: students' improved comprehension of written text, which leads to improved higher order thinking skills. This same process is used in mathematics with an emphasis in numeracy, computation fluency, and problem solving.

Through continually communicating with one another in weekly planning time about lesson planning, reteaching, and enrichment, teachers undergo a transformation in communication and

delivery of instruction, and they receive the myriad benefits of teamwork. By the end of Year 1 of the process, the teachers are amazed at what they have accomplished individually as well as with their colleagues. Further, teachers have built much tighter bonds within their schools through creating an atmosphere of trust through collaboration. Improved teacher skills, tighter collaboration, and greater trust are the end results of the FIP process, as are demonstrably improved student scores (measured weekly) and improved student and teacher morale. Teachers will also participate in regular all staff meetings at the school to keep them abreast of and engaged in the other, noninstructional elements of the school turn around.

E. Recruit, Place, and Retain High-Quality Staff. Through our METWorksSM framework, Learning Point Associates has identified the following research-based practices for recruiting, placing, and retaining high-quality staff:

- Recruiting teachers from preparation programs of proven quality
- Using effective hiring practices
- Providing a comprehensive mentoring and induction program
- Providing differentiated job-embedded professional development
- Promoting effective working conditions
- Using a fair and comprehensive performance management system that provides feedback and targeted support to those being evaluated
- Using targeted compensation and incentives to ensure a sufficient number of high-quality teachers, equitably distributed

Learning Point Associates will work with the district and school to implement the appropriate strategies based on schools' needs. For example, the latest research study from Chicago indicates that the primary driver for teacher retention is working conditions (Allensworth, Ponisciak, & Mazzeo, 2009). One mechanism to improve conditions is through a structured induction and mentoring program. If appropriate, Learning Point Associates would provide support in this area. We support the development of a comprehensive induction program to support and retain quality teachers by assisting districts and schools with research-based technical assistance and professional development. Learning Point Associates provides comprehensive training for mentors, administrators, and protégées; co-facilitation and co-design with a team of administrators and teacher leaders in the design and alignment of the program; and a suite of online tools known as the High Quality Teaching Online Professional Plan. This suite of tools also provides a formal mechanism for incorporating content knowledge, pedagogy, and professional teaching standards and corresponding tools into the professional development for new teachers and their mentors. Learning Point Associates uses the *Continuum of High Quality Mentoring and Induction Practices* as a beginning place for program design and development, as well as for a foundational structure for the program evaluation. Learning Point Associates also trains program administrators and mentors on The Classroom Teacher Observation Tool, an electronic tool used for observing and reflecting upon classroom teaching and learning. Used by the mentor, the tool is designed to capture observable behaviors and practices of the new teacher during a series of individual class sessions.

Additional information for this section can be found under Leadership, Staffing and Professional Development on page 51.

Turnaround Criteria 3. Comprehensive Instructional Reform Strategies

A. Use Data to Identify and Implement Comprehensive, Research-Based Instructional Programs. Data is the foundation of all decisions related to turnaround. The completion of the planning process will result in specific data-based decisions related to the instructional programs. If new curricular materials are required, we will use data and research to determine the best curriculum. In addition, regardless of the materials, SLI will use school data to identify and implement FIP, an Illinois State Standards aligned, data-driven research-based instructional program. FIP is a process, as opposed to a program, and the process follows the Integrated Plan-Do-Check-Act (Deming) model (online at www.mftrou.com/edwards-deming.html):

- Plan Instructional Calendar of Skills using disaggregated student performance data.
- Do Instructional Focus.
- Check performance with frequent assessments and activities.
- Act to maintain, enrich, and tutor student performance.

Plan: Specific Student-Achievement Data

Grades K–2. We use data from the Dynamic Indicators of Basic Early Literacy Skills (DIBELS) tests as well as from curricula-based tests. (Oral language skills are covered in the DIBELS tests.)

Grades 3–8. The Illinois Standards Achievement Test (ISAT), Chicago Public Schools (District 299) district benchmark assessments and/or other district assessments as relevant, grade-level curriculum measures (as they relate to the curriculum being used in the school), and other classroom indicators of student academic achievement are disaggregated by grade level, class, and student. At the high school level, the Prairie State Achievement Test (PSAT) and the National Assessment of Educational Progress (NAEP) tests are used, as well as tests relating to specific curricula. In other words, the data is broken down or “sliced” so that there is information on how each student, in every class, performs on each test. Data analysis is ongoing, usually every six to seven days. The data are specific enough to provide instructional direction for individual students, but also general enough to show trends and direct teachers’ instructional program. Assessments are used as a continuous tracking tool to identify any problems a student may have learning a specific standard. Data are used for the purpose of determining weak and strong areas. Data not only evaluate students, they also evaluate instructional effectiveness in teaching specific content and skills. Students learn what they are taught. Continual reflection on the part of teachers on the effectiveness of their instructional strategies is a key component of the process. From this analysis and reflection, teachers plan for instructional interventions for individual students and upcoming lessons.

Do: After data are used to create a plan, the instructional focus areas for the Illinois Reading and Mathematics Standards are developed. The plan includes the development of the instructional

calendar. Areas of instructional focus are selected from the state accountability requirements and matched to student learning needs.

Teachers are asked to implement the instructional focus in the following five easy steps:

1. Post and highlight the instructional focus at the beginning of class when student attention is at a peak
2. Build upon success and student’s prior knowledge with a warm-up of previously covered standards-based material to maintain and retain student understanding.
3. Deliver a lesson plan focused on the new standards.
4. Guide practice to reinforce the new skills and concepts.
5. Assess for understanding and remediate when necessary.

The instructional delivery here is by way of the FIP focus lesson as it meshes with the school curriculum, for example, whatever reading program the school is using. After a focus lesson is taught for a period of six days, that skill is then tested/assessed. Based on the results of the assessment, students are assigned to a success group for reteaching, maintaining, or enrichment. At this point, the students undergo another lesson at their appropriate level (i.e., reteach, maintenance, or enrichment) for another period of six days.

Check: Frequent Assessments. After the six- to seven-day Instructional Focus Cycle has been taught, a KAMICO skill assessment (a standardized test) is administered to identify mastery and nonmastery students. Approximately every sixth day a six-question, skill-focused assessment is administered to the students. This assessment is scored and results are posted within 24 hours (view online at www.kamico.com/).

After the assessments, it is important that the teachers meet together to review how different classes and students fared on the tests. Teachers meet weekly to discuss this stage of the process, thereby improving intra-teacher communication. This is where successes and improvement ideas are shared. Teachers meet on a regular and frequent basis to review the skills-focused assessments and plan for interventions. During these critical meetings, the school calendar can also be adjusted on the basis of areas that need additional emphasis.

Act: Based on the results of the assessments, students are grouped for “Success Time” in three groups:

- Tutorials/reteach—students who missed three or more questions demonstrating a lack of mastery of the skills
- Review for example—students who missed two questions thus demonstrate near mastery of the skill in question
- Enrichment group—students who demonstrated mastery of the skills by missing only one or none of the questions

Success time occurs for approximately 30 minutes, at least four times a week. The purpose of this is to meet students’ individual needs in mastering the focused skills of the week. Because

students are regrouped after each six-lesson cycle, student needs in specific skill areas are carefully met.

Vertical alignment of the program is achieved in several ways. During the needs assessment phase, the school and district curriculum will be assessed for alignment to Illinois State Standards for both content and cognitive demand. The SEC also will provide a picture of the alignment of the enacted curriculum to state standards and state assessments. Both of these tools allow for vertical alignment analysis, which will be used to assist the prioritizing of the instructional focus areas and skills. Vertical alignment will be maintained throughout the initial phases of implementation through vertical sharing of student data and lesson plan strategies. In the event that vertical articulation of the curriculum is deemed a high-needs area or a strategy for dramatic improvement through the needs assessment or initial phases of implementation of the FIP model, the school leadership team will be advised of strategies to improve curriculum alignment.

B. Differentiate Instruction. Our model works to ensure that the school takes responsibility for student learning and ensures the mastery of all skills for all students. To achieve mastery, it is necessary to take assessment results and provide tutorials, reassessments, and reinforcement of instructional focus areas. In the FIP model, Success Time lessons provide specific academic intervention for individual students based on frequent and regularly occurring assessments. Success Time is a specific, 30-minute period during the school day that occurs a minimum of four days per week. During this time, students are regrouped according to their mastery level for tutoring, review, or enrichment. Prior to administering the six-day skills-based assessment, grade-level teacher teams will have met to determine who will instruct each Success Time group and what materials will be used.

Success Time is an optimal time to differentiate instruction that meets the needs of students based on learning style, readiness, and interest. Tutorials provide additional time for review and reteaching that is required if all students are to attain mastery. Tutorials should not be perceived as punishment but as an opportunity to catch up and potentially excel in a difficult content area. Enrichment for students who master the standards allows those students to extend their learning with advanced academic materials, special projects, and performance-orientated assignments.

At the High School level, groups have to be determined in division homerooms or based on student performance data for English language arts or math initially. Department heads are the point persons in each curriculum area unless the school has a reading specialist on staff. There also will be a coordinator on-site to make sure that the Success Time is implemented properly. Again, at the high school level, this period could take place before or after school as a tutorial or during a student's study hall.

In addition to Success Time, teachers will receive additional coaching and mentoring related to differentiated instruction in their classrooms throughout the year. These concepts and skills will be reinforced through staff meetings and facilitated sessions during common planning time.

C. Integrate All Programs That Have an Impact on Instruction. One aspect of the needs assessment is the listing of instructional programs. Throughout the action planning and

monitoring process, instructional programs will be monitored and assessed for impact. As the Lead Partner, Learning Point Associates and SLI have the responsibility to assist school leadership teams with the careful integration and alignment of school programs. Those programs deemed to be ineffective or in competition with more effective programs will be eliminated. Remaining programs will be aligned with the school's mission and vision, and specific turnaround strategies will be designed during the action-planning process, thus bringing focus and coherence to all instructional programs.

In order to determine inclusion/elimination of an existing program, we ascertain what is in place at the school already. We would assess the current number of educational programs per participating school and, if there are too many programs, reduce those that are deemed nonessential according to the model.

The school leadership team, with strategic learning supports, then puts the SLI turnaround model in place and works to ensure that remaining programs align with the objectives of our intervention model, FIP. This is possible because FIP is a process that can be adjusted to school needs and not just a program with strict procedures. The FIP model can be implemented anywhere, along with existing programs, provided there is enough time allotted for planning, professional development, instruction and reteaching/enriching—all of which are mandatory components of the FIP process.

Furthermore, the FIP model does not present barriers when used with other programs because it is aligned the Illinois State Standards and all instruction is standards based.

The FIP instructional intervention model will initially focus on key curriculum content areas of literacy and mathematics. At the elementary level, science and social studies content instruction will incorporate the same literacy and mathematics skills. At the high school level, implementation will begin with only literacy and mathematics. Expansion of the FIP model strategies into other content areas will occur later, after the model is in place with fidelity. That said, all teachers at the high school level will have common planning time by content area, and all content-area teachers will be provided tools and resources for improved instruction.

Additional information for this section can be found under Educational Program on page 48.

Turnaround Criteria 4. Extending Learning Time

A. Extending Student Learning Time. Research by Marzano (2003) estimates that students have approximately 1,008 instructional hours during the course of a school year assuming a school calendar of 180 days and approximately 5.6 hours per day devoted to instruction in all academic areas. For students who are well below grade level and in schools with poor student performance, additional time in the school day is needed to close achievement gaps. An additional one hour of time per school day would add 180 instructional hours or 30 instructional days to the school year. This time would significantly increase time for core academic subjects, targeted academic intervention for students, and enrichment.

One use of this time will be for the implementation of Success Time, a key instructional intervention strategy of the FIP model. Within the FIP model, one period per day (30 minutes) is

set aside to reteach, maintain, or enrich a skill that was taught previously. Groups are formed on the basis of results of the FIP skill assessment administered according to the FIP Calendar of Skills. Instruction in Success Time is delivered in one of two ways, depending on the amount of staff available within a school building:

- Based on skill assessment results, students are grouped homogeneously in one classroom for the 30-minute period.
- Students are placed in their respective groups all in one classroom, with the teacher and possibly at least one other adult for the 30-minute period.

Both models or a combination of the two have been successfully implemented in SLI schools.

Some SLI network schools have used the FIP model in their afterschool programs. Most implement this time during the school's regularly scheduled reading and mathematics blocks. The best approach for each school will be determined during the needs assessment and action planning phases. One critical aspect of this determination will be the availability and effectiveness of the schools' existing afterschool programs.

Deborah Lowe Vandell at the University of California (2007) and others conducted a two-year national research study on elementary and middle school afterschool^[1] programs. The study (Vandell, Reisner, & Pierce, 2007) showed that regular participation in high-quality expanded learning programs resulted in the following:

- Gains in standardized math test scores for elementary and middle school students
- Gains in social skills with peers, gains in prosocial behavior, and reductions in aggression for elementary school students
- Reductions in misconduct for both elementary and middle schools students
- Reductions in the use of drugs and alcohol for middle school students

This and other recent research has solidified exactly what practices characterize a high-quality afterschool program. Many of the features of these programs are seen in high-quality teaching practices during the traditional school day. In an expanded learning model, the stronger connection and correlation between the traditional day and expanded learning programs provides the opportunity to amplify the effects of these practices with students.

Table 1 presents characteristics of promising afterschool programs, as defined by a recent study of afterschool programs.

[1] Throughout this document, we use the term “afterschool” to represent a broad range of expanded learning opportunities and settings. Other examples include, but are not limited to, extended-day programs, summer and intersession programs, Saturday academies, before-school programs and, increasingly, out-of-school learning opportunities offered during the regular school day.

Table 1. Process and Content Features Characterizing Promising Programs^[2]

Domain	Practice
<i>Positive Relationships</i>	
Positive teacher-child relationships	Teachers ^[3] treat children/youth with warmth, acceptance and respect. Teachers provide emotional support to children/youth. Teachers set age-appropriate limits for children/youth. Teachers affirm cultural identity.
Positive peer relationships	Teachers promote tolerance, understanding, and appreciation of differences. Teachers promote positive social interactions and communication among youth. Teachers encourage inclusiveness and use strategies for building group identity and focusing children/youth on common goals. Teachers help youth to develop conflict resolution skills and strategies for addressing threatening/bullying behavior. Teachers promote understanding of cultural identity and diversity.
Connections with families and the community	Teachers communicate with family about youth experiences. Families are welcome to volunteer and visit the program. Activities for youth connect them with neighborhood resources and with community mentors and leaders.

^[2] Wisconsin Center for Education Research & Policy Studies Associates (2002). *Study of Promising After-School Programs*. (Online at www.afterschoolresources.org/kernel/images/uwpsahyp.pdf).

^[3] Afterschool “staff” was referred to within the study. According to our model, these practices could be applied by school day teachers or expanded learning staff interchangeably.

<i>Program Content and Activities</i>	
Content-based learning opportunities that include a mix of academic and nonacademic skill-building activities	Content may include: <ul style="list-style-type: none"> • Arts, aesthetics, culture • Homework and tutorial assistance • Community service • Interdisciplinary and applied content • Opportunities to use written and expressive language in varied contexts • Opportunities to read and exchange ideas about books for varied purposes • Activities and games for practicing and applying everyday and school mathematics • Opportunities to develop planning, decision-making, information-seeking, and critical-thinking skills
Physical/recreation activities	Formal or informal sports/fitness activities. Recreational activities.
<i>Content Delivery Strategies</i>	
Structured and unstructured learning opportunities	Strategies may include: <ul style="list-style-type: none"> • Coaching/tutoring • Co-learning/collaboration/cooperation • Active/hands-on and interactive activities and project-based learning • Discourse, debate, and discussion with peers and adults • Multimodal communication (language, writing, art, music, performance)
Mastery orientation	Sustained activities and opportunities for practice and skill development. Goal setting, reflection, self-evaluation. Culminating activities
Opportunities for autonomy, choice, and leadership	Opportunities for making choices, solving problems, setting priorities. Formal and informal leadership opportunities.

Over the past decade, Learning Point Associates has developed substantial knowledge and experience in promoting the implementation of high-quality afterschool programs. In particular, our expertise and experience includes the following:

- Working closely with school leaders to provide stronger alignment between school-day practices and afterschool activities (both structurally and through high-quality academic enrichment curricular activities).
- Providing new afterschool program directors with research-based guidance on designing and implementing high-quality and sustainable programs.
- Providing afterschool practitioners with resources to support effective and engaging programming.

- Undertaking research studies and data collection and analysis efforts to inform how states have implemented their 21st Century Community Learning Centers (21st CCLC) programs.
- Assisting state education agencies (SEAs) and local grantees with their efforts to implement and manage expanded learning opportunities and to connect those initiatives to district and school improvement strategies.
- Conducting multimethod evaluations at state and local levels to assess the quality and effectiveness of afterschool programs.
- Providing national leadership to promote policies that will create broader access to quality afterschool programs and expanded learning opportunities.

B. Extending Teacher Collaboration Time. An additional hour per school day will provide additional schedule flexibility to the school’s master schedule. This flexibility will enable the master schedule to accommodate time for teacher collaboration by grade level or department for the purposes of collaborative review of formative assessment and progress monitoring of student learning. Based on these formative assessment pieces, teachers also will be planning lessons and activities to focus on the development of student conceptual knowledge and skills. The FIP intervention model requires collaborative teacher preparation time to review student results on formative assessment, development of lessons plans, and the organization of the Success Time learning blocks. Frequent and regular teacher collaboration time and activities will be woven into the school schedule and serve as a primary vehicle for school turnaround strategies.

C. Extending Enrichment Time for Students. The addition of an hour a day to the school schedule will provide for a variety of student support and enrichment activities. The Strategic Learning Initiatives model provides for flexible group of students during Success Time in which students who have demonstrated proficiency on skills and concepts receive extension and enrichment.

Utilizing the content and process features in Table 1, the extended time will be structured to provide enrichment time for all students, which will offer additional opportunities for hands-on, project-based learning for students to better engage and connect to the subjects they are learning and apply them to real-life situations. Staff would work on creating activities that would afford time and space to explore concepts introduced during the school day and also provide structure for students to pursue leadership opportunities in both the development and presentation of projects completed during the enrichment time.

Turnaround Criteria 5. Providing Operating Flexibility

We understand that in order for schools to receive funding for this work, the district and school must agree to provide operating flexibility to the school. This means that the building principal, in conjunction with advice from the Lead Partner, must have the authority to select staff, control the school calendar, and control resources to implement the intervention model. Our assumption is that the teachers union will agree to these principles prior to signing on. That said, we are committed to a communication plan up-front that explains what is happening, why it is happening, and how each stakeholder group will be affected.

A. Authority to Select and Assign Staff to the School. Through our METWorksSM framework, Learning Point Associates has identified several best practices related to staffing. We believe that the principal can leverage existing district resources while still maintaining operating flexibility in this regard. Learning Point Associates will provide research-based guidance regarding hiring, evaluating, and staffing of teachers.

B. Authority to Control School Calendar and Scheduling. After agreements are in place with teachers unions, the next largest hurdle regarding scheduling is often transportation. Extending the school day can pose challenges to the district busing schedule. Although we are not transportation experts, we would work with the district to identify viable transportation options in order to allow for the expanded school day. In the past, we have brought in expert consultants to work with individual schools on the scheduling process.

C. Control Over Financial Resources Necessary to Implement the Intervention. At the start of our engagement, we will prepare, with the principal, a budget for the school-level resources needed to do this work. A partner organization, Pivot Learning Partners, has deep expertise in this area and will provide a structure and framework for building the principal's capacity in this area.

Learning Point Associates will engage the expertise of Pivot Learning Partners for assistance with determining appropriate strategies for ensuring operational flexibility. With generous support from the Hewlett and Ford Foundations, Pivot Learning Partners has launched a groundbreaking joint initiative with the American Institutes for Research (AIR) aimed at improving school finance and governance in large, urban school districts. Working in collaboration with three prominent California school districts—Los Angeles (LAUSD), Pasadena, and Twin Rivers—provides multiple opportunities to explore ways in which new models of school finance and governance can impact student learning. This Strategic School Funding for Results (SSFR) project has two major goals:

1. To develop and implement more **equitable** and **transparent** strategies for allocating resources to schools.
2. To link those strategies to systems designed to encourage **innovation** and **efficiency** and to strengthen **accountability** for student outcomes.

SSFR consists of the following core components:

- Need-based funding of schools
- Increased school autonomy and accountability
- Programmatic and school choices for families and children
- Incentives for improving the distribution of teacher qualifications
- Options for schools to purchase central office services
- Participatory processes for making decisions about the SSFR policies

Launched in Fall 2009, the first phase of work focuses on conducting a needs assessments in each district, in collaboration with leadership in each of the partner districts, as well as data and policy analyses to support implementation of the new school finance and governance structures. Although the project is still in its very early stages, all three districts have begun work on developing a pupil-based funding strategy. Under the leadership of Pivot Learning Partners, LAUSD has developed initial project and change management plans, launched a project advisory group, and piloted a scaled-back version of “transparent budgeting” with 33 schools. Next steps for Pivot Learning Partners include the launch of principal working groups and data gathering (by partner AIR) to establish a baseline for how money is currently distributed and spent in real dollars per pupil at schools and districts.

This multiyear project will establish the foundation for the creation of a new approach, including a new formula for allocating resources to schools and supporting policies, procedures, tools, and training. Over the long term, SSFR aims to help federal, state, and local policymakers establish policies and make decisions that will impact equity, transparency, accountability, and innovation in the operation of K–12 education.

Lessons learned from this work will inform our practices in Illinois turn around schools, and tools, such as the Resource Allocation tool referenced in the professional development section on page 76 will be utilized.

Partners and Subcontractors

As an applicant for Lead Partner, Learning Point Associates has (1) an in-depth understanding of the nature of the work that needs to be performed in carrying out the scope of work associated with the contract in question, (2) a firm grasp of the strengths our present team brings to bear in performing key tasks, and (3) a good understanding of what additional skills, knowledge, and capacity we need to seek from external partners that will serve to enhance the robustness and utility of the work we will undertake as Lead Partner. Finding partners who would bring the additional skills, knowledge, and capacity to the project that would complement the strengths of our current team was paramount in the process we went through to identify and select Strategic Learning Initiatives as the instructional model for school turnaround.

Strategic Learning Initiatives (SLI) is a Chicago-based nonprofit organization dedicated to accelerating student and adult learning by integrating the best research from education and high-performance organizations to turn around the lowest performing schools. SLI’s capacity enables it to guarantee that participating schools will improve their scores if they get the commitment from their school leadership teams and district leaders in implementing and monitoring the SLI improvement process. It is called the Focused Instruction Process (FIP) to emphasize the instructional focus.

When considering how specific areas were to be subcontracted, we first created a matrix of skills that would be necessary to perform the work in each of the areas designated in the request for proposal (RFP). Within the matrix, we also outlined our capacity in each of these areas and identified those areas in which there were opportunities for improvement in terms of present skill level, knowledge, or capacity. We then looked for the strongest partners to undertake work in

those cells of the matrix where we felt there were opportunities for improvement. We searched and reviewed the businesses with whom we had worked with in the past, and those suggested by other staff within the organization. To ensure quality, we collected information concerning capabilities (e.g., resumes of key staff, references from customers, samples of previous work).

In reviewing this information, we looked for the following characteristics: (1) proven skills that matched the goals of the application design, quality assurance, analysis, and training and technical assistance tasks outlined in the scope of work; (2) demonstrated excellence in delivering high-quality and cost-efficient results; (3) a deep understanding of school turnaround; and (4) a demonstrated commitment to the mission and vision of the work. In general, decisions to work with subcontractors were based on the following five criteria:

- Nature of the deliverable
- Area of expertise
- Evidence of excellence in past performance
- Timeliness
- Cost

Based on this information, Strategic Learning Initiatives demonstrated the highest level of capacity in light of the aforementioned criteria in the area of the implementation of the instructional model. The organization brought structure and capacity to an area that aligned well with the Learning Point Associates implementation approach.

Pivot Learning Partners was identified as a strong partner in the area of aligning finance and budgeting with school priorities. Its work has gained national credibility and been funded by multiple foundations including the Hewlett Foundation and the Ford Foundation.

In addition to our partnership with SLI and Pivot Learning Partners, Learning Point Associates has long-standing work agreements with numerous organizations such as American Institutes for Research, The Innovation Unit, McREL, The New Teacher Project, Jofus and Cross, and RMC through our various national and state programs. As needed, these organizations and others will be subcontracted to provide specific content and capacity-building strategies under the guidance of Learning Point Associates.

Educational Program

Full details of the educational programming aspects of the intervention model can be found in the “Turnaround Criteria 3. Comprehensive Instructional Reform Strategies” section (p. 38) as requested. Summary information is included here.

Curriculum and Assessment. The Focused Instructional process does not require the use of a specific curriculum or specific materials. All lessons including tutorial support and enrichment will be guided by the Illinois State Standards. Through collaborative review and plan, teachers enhance the materials available to them to meet the needs of the students. FIP does not require specific curriculum materials. Through our experience, we know that low-performing schools

typically lack the curricular supports needed to be successful. Based on the needs assessment, additional curricular supports may be provided.

As a formative assessment process that emphasizes teacher use of data and collaborative reflection on accountability, the FIP process does require well-developed formative assessment tools in alignment with the state standards. Rather than mandating specific formative assessment tools, those resources already in place in the school will be reviewed. In the event that teachers cannot design or are in need of more structure formative assessment supports, SLI has experience with several systems and will advise the school leadership in the selection process.

State assessments including ISAT and Prairie State will provide the initial guidance for lesson development using the FIP process. Other assessments such as Dynamic Indicators of Basic Early Literacy Skills (DIBELS) tests, district benchmark assessments, and curriculum-based assessments currently in the district will be used in the development of a Calendar of Skills for intensive instructional focus. Depending on this calendar, a brief formative assessment will be given to students every six to seven days.

Based on the results of the formative assessment, students will be grouped by mastery level during Success Time. Success Time is a 30-minute lesson occurring four days a week in which students receive intense instruction based on their mastery of the particular skill. Students are regrouped at the end of the six-day cycle based on the results of the next formative assessment.

Meeting the Needs of All Students. The FIP model is designed as a general education strategy for use in all classrooms in the school. Special education and ELL teachers and students will participate in training, the FIP lesson, and assessment cycle. Coaches from SLI will work with teachers to implement the model for the benefit of their students. Because the FIP model takes students “where they are” in terms of skill mastery and moves them forward in gaining mastery, all students can make gains using this approach.

The expertise of Pivot Learning Partners in providing services to build the capacity of schools serving ELL students will augment the implementation of the FIP model. Pivot Learning’s English Learner Secondary Schools Network delivers services through a combination of professional development network meetings and site-level coaching with teachers and administrators, taking a systems approach to the improvement of teaching and learning for ELL students.

Learning Point Associates will work with school and district leadership to ensure that district guidelines and curriculum regarding the education of ELL and special education students are followed. In the event that the school demonstrates particular need in the areas of ELL and special education, Learning Point Associates will seek the most qualified subcontractor or other highly qualified assistance for school leaders, teachers, and parents. As the Lead Partner, Learning Point Associates will ensure that the services of this partner are well aligned and integrated with the school turnaround strategies to provide a coherence approach to improving student achievement.

School Calendar. Schools will maintain the school calendar in terms of number of days and holidays as organized by the district. Although the FIP model and other school strategies can be implemented during the number of school hours currently in place, Learning Point Associates will work with the school and the district to extend the school day by approximately one hour each day to facilitate the implementation of the tutorial and enrichment support for students. This time also will allow for greater scheduling flexibility to increase teacher collaboration time and planning for the remediation and enrichment needs of students. If the school day cannot be lengthened on a daily basis, Learning Point Associates will work with the school to determine how the additional instructional time will be achieved. This might include lengthening one or two days per week, requiring weekend or evening attendance, or eliminating noncore activities during the existing school day.

Equity and Diversity. Learning Point Associates and SLI view school turnaround as civil rights responsibility. For the past two years, Learning Point Associates has supported Oswego and Plainfield Community Unit School Districts in teacher training on culturally proficient pedagogy. SLI consultants have all served as leaders, teachers, and parents in diverse schools. Although no adjustments to curriculum materials are required to implement the FIP approach, SLI and Learning Point Associates will model and advocate for culturally proficient policy, program, and instructional practices.

Instructional Technology. Learning Point Associates previously housed the North Central Regional Technology Education Consortium and developed *enGauge*, a Web-based framework that describes six essential conditions or systemwide factors critical to the effective use of technology for student learning. Although this service line is not included in this proposal, we have the skill and expertise to work with school and district leaders on application of technology for instruction. We propose to work with the schools' current technology capabilities and design strategies for improvement as they align with the turnaround strategies designed during the needs assessment and action-planning process.

School Culture and Climate. Each of the strategies and activities articulated above will be designed for the purposes of creating a positive school culture that promotes excellence in both student achievement and teacher and leadership effectiveness. Culture is a function of the relationships of the people involved. Through shared leadership, focused strategies for improved instruction, thoughtful and purposeful engagement with parents and the community, Learning Point Associates and SLI will work with the teachers, leaders, and parents to establish an engaging school culture in which all students achieve.

Learning Point Associates also will work with school and district leaders to evaluate discipline policies and programs in the school for effectiveness in supporting student engagement and learning. We will provide researched best practices and support in discipline and student engagement in response to this evaluation. As Lead Partner, Learning Point Associates will help school leaders procure the services of additional subcontractors as needed. It will be the responsibility of Learning Point Associates to ensure that these services are in alignment with school turnaround strategies and to monitor their effectiveness.

P–20 Transitions. Services for early childhood providers initially will be offered only through workshops to help home day care providers develop an understanding of child development and the expectations for children entering kindergarten. Through the process of concept mapping the school and community context, the community needs for early childhood education will be identified. Although Learning Point Associates is not equipped to establish early childhood programs, we can assist school and district and school leaders in their work with local youth service and public health organizations.

Similarly, parent and student workshops, the community concept mapping process, and the School Partnership Council all will be vehicles for identifying postgraduation opportunities for students. Learning Point Associates has experience through our Great Lakes East Comprehensive Assistance Center in helping to design P–20 partnerships. This experience will enable us to help school and district leaders engage with colleges and universities in the region. At the high school level, this may include the establishment of dual college enrollment programs to support students’ postgraduation transition. Using resources from the National High School Center, we also have the ability to assist schools in designing middle to high school transition programs.

As a Lead Partner, Learning Point Associates will help school leaders procure the services of additional subcontractors as needed. It will be the responsibility of Learning Point Associates to ensure that these services are in alignment with school turnaround strategies and monitor their effectiveness.

Leadership, Staffing, and Professional Development

Full details of the leadership, staffing, and professional development plan can be found in the “Transformation Criteria 2. Developing Teacher and School Leader Effectiveness” section (p. 32). Summary information is included here.

Leadership Team and Principal Selection. Administrator quality is of the utmost importance to districts seeking to improve student achievement, but too often, districts are left to define their own process and create their own hiring tools. Although Learning Point Associates will not select the school principal, we will work with district administrators during the selection process. Because of the requirement for principal replacement at the national level, we anticipate a shortage of high-quality candidates who are experienced in turnaround. As such, our model includes extensive training and support for the building principal, new or existing. To assist districts in selecting quality school administrators, Learning Point Associates developed the Quality School Leadership Identification (QSL-ID) tool. The QSL-ID tool and accompanying facilitators guide provide a standardized hiring procedure built from research-based tools that the hiring committee can use to reach a consensus selection of a new school principal.

Learning Point Associates will work with district leaders to ensure that the most current research-based best practices are used in the evaluation process. Our expertise in this area is strong as a lead partner in the National Comprehensive Center for Teacher Quality, which includes resources, expertise, and tools for teacher and leader evaluation.

Evaluation of Effective Intervention Implementation. Learning Point Associates will work with school and district leadership in the spring, prior to the start of the school year, to ensure that the best practices in evaluation are implemented by the district and school as part of the school's turnaround strategy for building a highly effective teaching staff. This will include the provision of observation tools and interview protocols that can be used. We will participate in staff interviews with the principal and district leadership if desired. Given that the needs of schools and options for schools vary greatly in districts based on location (urban versus rural), grade level, and content area, we will work with the school to determine the best mechanisms for acquiring the most committed and competent staff at the start of the school year.

For a school to choose this model, all teachers will need to sign an individual memorandum of understanding that outlines their commitment to the process.

Collaborating With Faculty. The school leadership team will be directly involved in the needs assessment process, which culminates in designing an intervention strategy action plan. Learning Point Associates will assist the school leadership team in communication and monitoring strategies. Augmented teacher roles such as the turnaround coordinator, mentor teachers, and grade-level and department chairs will be represented on the leadership team to aid in collaborative, shared leadership. Regular and frequent common planning time will ensure that the entire staff is involved in the turnaround process. In addition, frequent all-staff meetings will be focused around different aspects of the turnaround process.

For monitoring progress of implementation elements and reporting on key indicators of program outcomes, the school leadership team will be trained by Pivot Learning Partners in the use of the Walk'Bout tool. The Walk'Bout tool is both a protocol for conducting short classroom observations and an online database for aggregating the information gathered. This Web-enabled tool, which sits on a PDA or iPhone-type mobile device, prompts observers to look for identified practices and allows those walking through classrooms to input data quickly into a program that automatically generates standard reports that can be quickly communicated, via e-mail, to staff. This enables school leaders to easily and quickly take a "snapshot" of the level of implementation of an identified practice on a given day, see the impact of a professional development session on teacher practice, and chart progress over time. In this way, the Walk'Bout streamlines the collection of objective information regarding the implementation of schoolwide goals related to effective instructional practices, depth of knowledge levels of student activities, and alignment of instruction to state content standards. Data from this tool will be used by the leadership team for monitoring progress of program elements as well as communicating progress to teachers and staff.

Staffing Model. In order to adequately staff the model, we recommend a school leadership team including school administrators, teachers who are grade-level or department heads, and special education teacher leaders. The number of people on the school leadership team will depend on the size of the school and the number of staff members. Two new positions will need to be created for the turnaround strategies represented in this proposal, as follows:

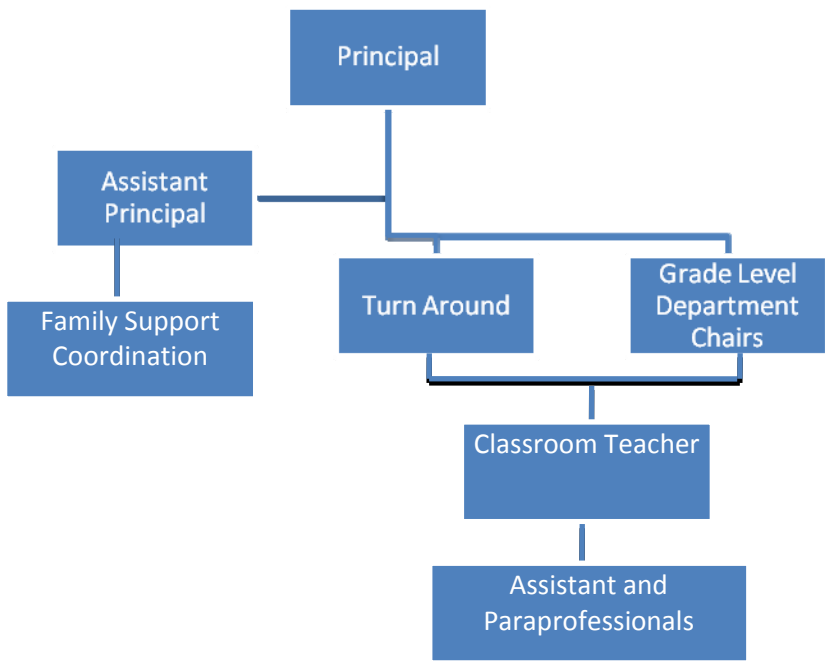
- **Turnaround Coordinator.** The turnaround coordinator is a full-time position staffed by an highly qualified and effective teacher with strong leadership and professional development skills. We recommend that this person have experience in the school being

served in order to maximize relationships with the current teacher staff and families. SLI and Learning Point Associates will train and advise the turnaround coordinator in coaching staff, leading collaborative assessment review, and lesson planning. Although this staff member will not have teacher evaluation responsibilities, he or she will play a significant role as a peer coach and mentor to teachers and be a member of the school leadership team. In a large school building serving a large number of teachers, two coordinators may be required in order to provide teachers with adequate coaching.

- **Family Support Coordinator.** The family support coordinator is a half- or full-time position, depending on the size of the school. This is a noncertified position best filled by a member of the parent community served by the school. Learning Point Associates and SLI will train and advise the family support coordinator in duties such as coordinating the School Partnership Council and parent workshops. The family support coordinator will serve on the leadership team as appropriate.

A core team of two individuals—one from Learning Point Associates and one from SLI—will be assigned to the school to serve as lead consultants who will coordinate the services of additional staff and consultants. Additional staff and consultants will provide specific content and management expertise to support implementation of the turnaround strategies.

Organizational Chart. A basic school-level chart is shown below in order to note the lines of authority, including the new positions of turnaround coordinator and family support coordinator. Although they are placed higher in level on the organizational chart, the grade-level and department chairs as well as the turnaround coordinator position may or may not have responsibility for evaluations of classroom teachers. Such evaluation lines will be worked out with the individual schools based on school size and teacher qualifications. This model is meant simply a basic guide rather than a requirement for a school-level organizational chart because other roles and positions may need to be incorporated.



Performance-Based Incentives. Learning Point Associates will work with district and school administrators to make decisions and design programs to offer performance-based incentives to attract, retain, and reward staff. Although we do not prescribe a particular performance-based incentives plan, Learning Point Associate is home to the federally funded Center for Educator Compensation and Reform. Our expertise in educator compensation will provide research-based guidance to school and district leaders in the area of performance-based incentives.

Work Schedules. The FIP model is centered on collaborative review of formative assessment data, lesson planning, and designing student interventions. Strategic Learning Initiatives will work with the school turnaround coordinator to provide training and imbed professional development into weekly grade-level meetings. A sample of the work schedule requirements are listed in Table 2.

Additional professional development will be a combination of that which is needed to implement the FIP model and other turnaround strategies based on the results of the needs assessment. A three-year professional development plan will be an outcome of the action-planning phase.

Table 2. Sample Annual Work Schedule

School Leaders	Teachers
<ul style="list-style-type: none"> • Two training days for the Principal prior to the opening of school on FIP • One week targeted leadership academy training for principals focused on turnaround strategies • Three days training for the school leadership team focused on turnaround strategies • Weekly meetings in the school for the leadership team • Whole-school faculty meetings at least twice a month • Four network process checks with all schools within the network; changes as time goes on—down to two checks held in the school building by Year 4 • One network, end-of year evaluation 	<ul style="list-style-type: none"> • Four training days prior to the opening of school • Weekly meetings with grade levels or department • Daily common planning time with grade levels or departments • Ongoing professional development provided on-site by SLI four times per year • Whole-school faculty meetings at least twice a month • One network, end-of year evaluation

Professional Development Calendar. Table 3 displays a sample calendar required for implementation of the FIP model, which will be the primary instructional strategy for the first year of implementation. Additional professional development will be planned with the school leadership team based on the needs assessment and progress monitoring of implementation.

Table 3. SLI-FIP Model Sample Professional Development Calendar for Year 1*

Month	Elementary	High School
June/July	Four days initial training for the school leadership team	Four days initial training for the school leadership team
	Two days training for the FIP coordinator	Site visit to a school using the FIP model
	Principal training	Two days SL support
	Focus skill calendar development meeting	
	Assessment selection meeting	
	Parent coordinator training	
	Site visit to a school using the FIP model	
	Parent workshop survey distributed	
August	Two days team skills training for leadership team	Two days team skills training for leadership team
	FIP introduction to whole staff	One day reading coach support
	Two days on-site support from SLI FIP facilitator	One day math coach support
	Principal training	One day SL support
	PE coordinator meeting	
	Two days PE coordinator training	
	One day SL support and coaching	
September	Leadership team meeting	Leadership team meeting
	On-site process check	On-site process check
	FIP coordinator meeting	One day reading coach support
	Two days on-site support from SLI facilitator	One day math coach support
	Half-day PD workshop	One day SL support
	Two-hour parent workshop	Two-hour parent workshop
	One day SL support and coaching	
	FIP coordinator coaching	
	FIP coordinator training	
October	Leadership team meeting	Leadership team meeting
	FIP coordinator meeting	One day reading coach support
	Two days on-site support from SLI facilitator	One day math coach support
	Two-hour parent workshop	One day SL support
	PE coordinator meeting	
	Two days PE coordinator training	
	One day SL support and coaching	
November	Leadership team meeting	Leadership team meeting
	FIP coordinator meeting	Network process check

Month	Elementary	High School
	Half-day PD workshop	One day reading coach support
	Two days on site support from SLI facilitator	One day math coach support
	Two-hour parent workshop	One day SL support
	School snapshot	Two-hour parent workshop
	One day SL support and coaching	
	Network process check	
December	Leadership team meeting	Leadership team meeting
	FIP Coordinator Meeting	One day reading coach support
	Two days on-site support from SLI facilitator	One day math coach support
	PE coordinator meeting	One day SL support
	One day SL support and coaching	
	Principal network meeting	
	FIP coordinator training	
January	Leadership team meeting	Leadership team meeting
	On-site process check	On-site process check
	FIP coordinator meeting	One day reading coach support
	FIP coordinator coaching	One day math coach support
	Half-day PD workshop	One day SL support
	Two days on-site support from SLI facilitator	Two-hour parent workshop
	Two-hour parent workshop	
	Two days PE coordinator training	
	One day SL support and coaching	
	PE train-the-trainer training	
February	Leadership team meeting	Leadership team meeting
	FIP coordinator meeting	One day reading coach support
	Two days on-site support from SLI facilitator	One day math coach support
	Half-day PD workshop	One day SL support
	PE coordinator meeting	
	PE train-the-trainer practice	
	One day SL support and coaching	
March	Leadership team meeting	Leadership team meeting
	FIP coordinator meeting	One day reading coach support
	Two days on site support from SLI Facilitator	One day math coach support
	Two hour parent workshop	One day SL support
	PE train-the-trainer practice	Two-hour parent workshop
	School snapshot	

Month	Elementary	High School
	One day SL support and coaching	
April	Leadership team meeting	Leadership team meeting
	Network process check	Network process check
	FIP coordinator meeting	One day reading coach support
	Two days on-site support from SLI facilitator	One day math coach support
	PE coordinator meeting	One day SL support
	One day SL support and coaching	
	Principal network meeting	
May	Leadership team meeting	Leadership team meeting
	FIP coordinator meeting	One day reading coach support
	Two days on-site support from SLI facilitator	One day math coach support
	Two-hour parent workshop	One day SL support
	One day SL support and coaching	
June	Leadership team meeting	Leadership team meeting
	FIP coordinator meeting	Year-end evaluation
	Two days on-site support from SLI facilitator	Team skill training
	Assessment selection meeting	Year-end evaluation
	Focus skill calendar development meeting	
	Team skill training	
	Year-end evaluation	

*Abbreviation Key: PD = professional development; SL = shared leadership; PE = parent engagement.

Learning Point Associates and SLI have exceptional expertise in designing and providing high-quality professional development. Learning Point Associates follows a detailed and extensive quality assurance process in which senior level staff approve all professional development offerings prior to their implementation. At the conclusion of each session, participants will be asked to complete a session evaluation that will be used by Learning Point Associates for both formative and summative evaluation of the professional development program. The Walk’ Bout tool described above also will be used to monitor the progress of instructional strategies included in the professional development plan.

Physical Learning Environment

Details of the physical learning environment can also be found in the “Turnaround Criteria 1. School Culture and Climate” section.

An initial step in the needs assessment process will be a tour of the school’s physical plant with the district administration charged with physical plant oversight. Any notable needed improvements will be discussed and negotiated with district administration. Throughout the needs assessment phase, classroom observers and interviewers will be asked to note physical

learning environment needs and how they may hamper instructional effectiveness. These observations will be considered during the action-planning phase and placed in priority with other turnaround strategy plans. Although improvements to the physical plant are outside of the Learning Point Associates scope of work, we will work with the leadership team and support the School Partnership Council in securing volunteers and outside funds for such improvement efforts as they are needed.

The School Partnership Council also will play a role in helping to determine if the school environment is welcoming to students and parents. One aspect of its role is to help determine and promote the visibility of the school's mission and vision to those who visit the school.

Along with the school's mission and vision serving as guideposts for turnaround strategies, the communication of the school's beliefs about student and teacher achievement will be integrated into the strategy development for turnaround. Public or semipublic displays of school progress on key turnaround indicators identified in the intervention plan will help to continuously communicate school progress to teachers, students, family, and community.

4. Building Capacity for Sustained Improvement

Learning Point Associates believes that the surest path to long-term comprehensive school improvement and increased student achievement is building a system's capacity to help itself. This goal can be achieved through conducting comprehensive needs assessments, the consistent application of human capital strategies based upon evidence from scientific research and rigorous practice, evaluation and continuous improvement of the implementation of those strategies, and ongoing technical assistance and monitoring support. We will focus considerable attention on building the capacity of school leadership teams to do the following:

- Use needs assessment data to drive action planning and decision making.
- Plan for implementation of turnaround strategies that are well aligned with research-based practices.
- Lead the continuous school improvement process.
- Engage community stakeholders in the process of continuous improvement and increase awareness of accountability.
- Comply with all Illinois Partnership Zone activities.

Over the course of five years of working with districts as part of the Illinois Partnership Zone, we propose to structure the activities in the work plan to ensure that the services can be managed by the school to sustain the improvements and resulting growth.

Our experience indicates that in order to make continuous progress over time, a school must closely monitor its performance against the indicators set out in the action plan, as well as against the research-based practices.

As indicated in Table 4, the needs assessment and initial planning will take place in Year 1. In Year 2, the implementation of the FIP model commences along with additional action planning.

Beginning in Year 3, districts will engage in additional data collection activities to assess the ongoing implementation. This information will be used by the action-planning team to refine efforts using a continuous improvement cycle and will guide decisions about program adjustments and improvements to increase the likelihood of positive impact.

As district teams begin to lead the key activities for implementation, Learning Point Associates moves into a role of providing only monitoring support and technical assistance in Years 4 and 5. We provide tools, such as the Walk’Bout tool, that schools can use at a very low cost (\$250 per year) on an ongoing basis to self-monitor. Monitoring support and technical assistance often take the form of quarterly or semiannual meetings or check-in reports, whereby, over time, Learning Point Associates builds the district’s capacity to self-monitor progress and make changes to the plans and indicators as required for stronger implementation. Throughout all five years, Learning Point Associates and the school district ensure community engagement through various strategies (see the Community Involvement and Engagement section, p. 19).

Table 4. Overview of Years 1–5

Year	Needs Assessment & Planning	Implementation of Turnaround Services	Evaluation of Services & Improvement Cycle	Monitoring Support & Technical Assistance	Community Engagement
Spring 2009	X				
Year 1	X	FIP model implementation			X
Year 2	X	X			X
Year 3		X	X		X
Year 4		X	X	X	X
Year 5			X	X	X

5. Outcomes-Based Measurement Plan

To assess the effectiveness of intervention implementation and to inform continuous progress monitoring and program improvement, an outcomes-based measurement plan will be employed in each school. It is essential that these plans be both tailored to the needs of the individual school and reflective of the evolutionary process of turnaround across the five-year timeline. The following section details the process by which school-specific outcomes-based measurement plans will be developed, used by intervention stakeholders, and refined throughout the course of the intervention. In addition, a timeline for development and implementation is included, and specific outcomes and indicators—in alignment with the turnaround criteria—are discussed.

Process

In September 2009, the Learning First Alliance issued the following principles to guide the measurement of progress in schools undergoing turnaround:

- Measure progress toward a broad vision of student success.
- Measure the conditions for school and student success.
- Ensure that measures are clear and available to all stakeholders.
- Track progress over time.
- Include experts' qualitative judgment when measuring turnaround progress.

Our proposed approach to outcomes-based measurement in turnaround schools reflects these guiding principles as context. Although the Learning Point Associates team is prepared to and experienced in working with an external evaluator and in conducting external evaluations, it is essential that the outcomes-based measurement plans utilized at the school level enjoy buy-in and support from key constituencies in the school and those involved in the turnaround effort. In this way, outcomes-based measurement should be embedded in the turnaround process with ownership and investment by all stakeholders, similar to an internal evaluation with continuous feedback loops for formative improvement. For this reason, we proposed the following collaborative process to develop, refine, and implement outcomes-based measurement plans.

Planning. As previously noted, an integral first phase to the turnaround work is a comprehensive and extensive needs assessment. Initial efforts at planning the outcomes-based measurement plan for an individual school will dovetail with the needs assessment in order to capitalize on multipurpose data sources and to engage all key stakeholders from the inception of the project.

In the planning period, it is essential that school leaders and faculty, those leading and implementing the turnaround process, and parents and community leaders work with the evaluation team to develop the outcomes-based measurement plan, including identifying and refining measures of progress, determining a reasonable and actionable timeline for data collection and use, and establishing expectations around continuous data use and feedback.

In each of the subsequent four years of intervention implementation, the process will include reconvening these stakeholders to both review collected data regarding progress on the identified outcomes and indicators and to refine elements of the outcomes-based measurement plan going forward. This process is important so that those involved in the turnaround effort retain ownership and involvement in analyzing and using data and to ensure that the plan remains aligned with turnaround efforts and reflective of each school's individual context. These feedback loops provide for continuous data use and integrate outcomes-based measurement with the turnaround efforts, rather than partitioning them in a way that stifles formative data use. At the same time, the continuous feedback mechanisms allow for refinement of the outcomes and indicators should the projected measures of progress change or fall out of alignment with the turnaround process as implemented.

Training. To encourage buy-in to the outcomes-based measurement approaches and to facilitate data collection in each individual school, Learning Point Associates will hold trainings with school stakeholders. These trainings will cover the outcomes-based measurement plan, including indicators/measures, intermediate outcomes, and long-term intervention outcomes and will detail data collection methods and data sources that map to each indicator. In addition, trainings will outline the timeline of planning, data collection, and data use and will explain the feedback

mechanisms in place to ensure that the outcomes-based measurement plan remains flexible and responsive to school needs while retaining objective measurement of turnaround progress.

Data Collection. Following the development of the outcomes-based measurement plan for each school, evaluators from Learning Point Associates—who have extensive experience collecting data in schools and working with schools to use data—will support the intervention team and key stakeholders in collecting and processing the relevant data elements. In particular, many of the components of data collection incorporated in the needs assessment will be employed in the outcomes-based measurement process, including classroom observations, school-level interviews, educator survey, the *Surveys of Enacted Curriculum* (SEC), key document review, and curriculum alignment. In addition, for monitoring progress of implementation elements and reporting on key indicators of program outcomes, the school leadership team will be trained by Pivot Learning Partners in the use of the Walk’Bout tool. The Walk’Bout tool is both a protocol for conducting short classroom observations and an online database for aggregating the information gathered. Full details are included on page 52.

Finally, the team has extensive experience working with extant data sources, including administrative data and student-achievement data. These existing data sources will speak to the indicators employed in schools’ outcomes-based measurement plans, and will require gathering and potentially manipulating to prove useful for the turnaround team in assessing progress. Because our evaluation team brings a strong background in working with schools, districts, and states to collect both new and existing data on comprehensive measures of improvement and progress, we are well positioned to support this work.

Data Use. Analysis, processing, interpretation, and use of data collected for the outcomes-based measurement plan are integral steps in generating a continuous improvement cycle based on available data and in assessing progress in school turnaround. There are three primary aims of the data use phase of this process: (1) to assess progress in meeting the goals of the intervention, (2) to inform continuous improvement with formative findings throughout implementation, and (3) to refine outcome-based measures if needed.

While assessing progress in meeting intervention goals—that is, analyzing program effectiveness in affecting the outcomes of interest—is the overarching goal of an outcomes-based measurement plan, it is also an essential feature of this process to use data throughout intervention implementation to make any necessary improvements and adjustments based on data. This collaborative process involves the school stakeholders and intervention partners contributing in an ongoing way to improved implementation. Similarly, the feedback loops also allow the evaluation team to make adjustments to the outcomes-based measurement plan should those refinements become necessary given programmatic or data availability changes.

Timeline

The timeline for implementation of this process in each year of the project looks similar, with minor adjustments based on program maturity. Table 5 details the stages to the process and a projected time frame for those activities in Year 1, the planning year, and in Years 2–5 of intervention implementation.

Table 5. Timeline of Outcomes-Based Measurement Activities

	Activities	Timeframe
Year 1	Planning meeting with stakeholders	July–August 2010
	Training	August–September 2010
	New data collection	October 2010–April 2011
	Extant data collection	January–June 2011
	Data analysis	February–July 2011
	Data use meetings	July–August 2011
Years 2–5	Planning meeting with stakeholders; refinement of outcomes-based measurement plan	August–September 2011 August–September 2012 August–September 2013 August–September 2014
	Refresher training	August–September 2011 August–September 2012 August–September 2013 August–September 2014
	New data collection	October 2011–April 2012 October 2012–April 2013 October 2013–April 2014 October 2014–April 2015
Years 2–5 (continued)	Extant data collection	January–June 2012 January–June 2013 January–June 2014 January–June 2015
	Data analysis	February–July 2012 February–July 2013 February–July 2014 February–July 2015
	Data use meetings	July–August 2012 July–August 2013 July–August 2014 July–August 2015

Outcomes and Indicators

The process of developing an outcomes-based measurement plan for each school will take into account where each school stands at baseline on the overarching outcomes of interest, its unique context, and its goals for improvement and progress. That said, there are core criteria against which any turnaround effort will be assessed. Each tailored outcomes-based measurement plan must incorporate this balance of objective standards for improvement and progress with

outcomes and measures that make sense for an individual school and are agreed upon by the stakeholders in that school.

The needs assessment process discussed previously, as well as Year 1 planning meetings and stakeholder input, will assist in identifying and refining the long-term outcomes, intermediate outcomes, and specific indicators or measures of progress relevant for each school’s turnaround process. Ideally, these efforts to collaboratively plan for outcomes-based measurement will elicit the support and buy-in of those in the school and partners in intervention implementation. It is only through such collaboration and joint ownership that a meaningful data use feedback process can be established and sustained.

Table 6 presents the objective turnaround criteria as well as proposed outcomes of efforts in each of those areas. In addition, the table outlines potential intermediate outcomes and some specific indicators or measures that can be collected to speak to those outcomes.

Table 6. Crosswalk of Turnaround Criteria With Proposed Outcomes and Indicators

Turnaround Criteria	Outcomes	Intermediate Outcomes	Indicators/Measures
Criteria 1. School culture and climate	Improved school climate and culture	[REDACTED]	[REDACTED]
	Enhanced parental involvement and engagement	[REDACTED]	[REDACTED]
Criteria 2. Developing teacher and school leader effectiveness	Improved faculty collaboration	[REDACTED]	[REDACTED]
	Improved teacher effectiveness	[REDACTED]	[REDACTED]
	Improved school leader effectiveness	[REDACTED]	[REDACTED]
Criteria 3. Comprehensive instructional reform strategies	Aligned written, taught, and tested curriculum	[REDACTED]	[REDACTED]
	Improved student performance for all students and subgroups	[REDACTED]	[REDACTED]

Turnaround Criteria	Outcomes	Intermediate Outcomes	Indicators/Measures
	Enhanced rigor and expectations for all students	[REDACTED]	[REDACTED]
			[REDACTED]
Criteria 4. Extending learning time	Sustained linkages to community	[REDACTED]	[REDACTED]
	Extended learning time	[REDACTED]	[REDACTED]
Criteria 5. Providing operating flexibility	Capacity for sustained improvement beyond the intervention implementation period	[REDACTED]	[REDACTED]

6. Nonoperational Support Functions

All nonoperational support functions will be maintained by the school district. Learning Point Associates will coordinate with district personnel to ensure the required operational support functions for the school.

7. Fiscal Status Reporting

Learning Point Associates will report on fiscal status as requested by both the district and ISBE to meet requirements.

Demonstrated Record of Effectiveness

Learning Point Associates, Strategic Learning Initiatives, and Pivot Learning Partners all bring to the table concrete results where schools and districts have shown dramatic increases through engagement with us in the use of our process, and tools. We have highlights of these results here.

Learning Point Associates

Audit of the Written, Taught, and Tested Curriculum in New York State Districts

Since the beginning of the 2005–06 school year, Learning Point Associates has worked with 34 districts that have failed to meet academic standards across the state of New York to create customized plans for improving their performance. The basis of each improvement plan is our comprehensive audits of the written, taught, and tested English language arts (ELA) and mathematics curricula in the districts' schools.

With each district, a four-step process was followed: planning, data collection, co-interpretation of findings, and action planning based on key findings and auditor recommendations. Staff employed a variety of data collection methods to reveal a complete picture of what is being taught, how it is being taught, and where it matches state curriculum standards. An alignment study of each district's written curriculum was conducted against the state content standards. The unique approach to interpretation involved engaging districts in the process and led to ownership of the key findings by district staff.

The audit process concluded with a final report to the New York State Education Department and the districts, which included detailed recommendations. Each district is responsible for creating an improvement plan detailing how it will respond to the recommendations and is held accountable by the New York State Education Department for implementing the recommendations during the next three years. In many districts, Learning Point Associates facilitated that planning process, helping districts create measurable plans.

In total, our audits have reached more than 630,000 students in kindergarten through Grade 12 in urban, suburban, and rural school districts in New York City, Long Island, and the greater New York metropolitan area, as well as upstate New York. Of the 34 districts that were audited, 17 are in good standing.

In addition to the quantitative results and because capacity building is a cornerstone of our work, clients' comments regarding their learning and increased capabilities are other qualitative data Learning Point Associates collects concerning effectiveness. In district-level co-interpretation meetings this year in New York, for example, we received the following comments from district administrators:

- *By going through this process with colleagues, we already have deepened the process of moving ahead. Walking through the data in this way was a great learning experience and very helpful.*
- *The most important thing I learned at this meeting was the process. We will model this for future districtwide planning.*

Principals stated the following:

- *I don't think there were surprises in what was learned. I think that the most important thing was that the whole group understood the process. I think the process was wonderful.*
- *The meeting was extremely valuable, and I believe that the district is ready to now write a plan that will raise student achievement.*

A reading coach shared the following:

- *The most important thing I learned at this meeting was that perceptions, observations, and documented evidence vary. This process is effective in helping us internalize such a huge volume of information. This process kept us focused and engaged.*

Teachers reported the following:

- *The most important thing I learned at this meeting is a better understanding of the whole process and how we are going to hopefully create a plan that we will be able to implement and most importantly be able to move forward.*
- *The most important thing I learned at this meeting is how to look at the data objectively and organize it. It was an amazing process to actually get to the key findings.*
- *I'm anxious to see this through! You have given us a sense of ownership of the process.*
- *The most important thing I learned is that collaboration is key to building a plan for change.*


Learning Point Associates uses this type of feedback as one way of gauging our effectiveness. The fact that persons with different responsibilities and skill sets are able to increase their sense of agency and control and feel that they could effect positive change based on their learning experience with us confirms the potential of our process to increase individual and school-building capacity.

The districts in which Learning Point Associates has conducted curriculum audits include the following:

- 2005–06:** Yonkers, Wyandanch, Hempstead, Buffalo, Syracuse, Rochester, and New York City Districts 3 and 31
- 2006–07:** Schenectady and New York City Districts 4, 6, 7, 8, 9, 12, 19, 24, and 31
- 2007–08:** Rome, Utica, Binghamton, Newburgh, Poughkeepsie, Mount Vernon, Dunkirk, and New York City Districts (formerly 10, 11, 14, 18, and 29).
- 2008–09:** East Ramapo CSD (ELA), Kingston CSD (ELA), New York City Districts 1, 13 (ELA for both).


Reference





More information on the work of Learning Point Associates in the Dunkirk City School District is described in “Seizing the Opportunity to Improve Student Achievement,” an article in the May 2009 issue of *ASQ Primary and Secondary Education Brief*, a publication of the Education Division of the American Society for Quality (online at www.asq.org/edu/2009/05/continuous-improvement/seizing-the-opportunity-to-improve-student-achievement.pdf).

References



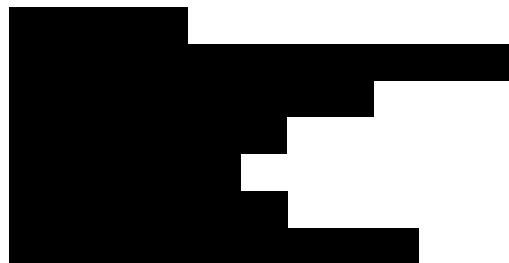
Curriculum Audit in the Elkhart Community School District

After being cited for corrective action under the NCLB Act in English language arts (ELA), many districts have contracted Learning Point Associates to carry out curriculum audits, including the Elkhart Community School District in Northern Indiana. A comprehensive ELA curriculum audit was conducted in this district of approximately 13,500 students during the 2007–08 school year. During this audit, Learning Point Associates collected information regarding ELA curriculum, instruction, assessment, professional development, and intervention services. The data sources included the following:

- Analysis of three years of ELA achievement data
- K–12 ELA curriculum alignment to the state standards
- ELA assessment alignment to the state standards
- 88 interviews with district and school-level staff
- Key document review of ELA policies and plans
- 100 hours of ELA classroom observations

Every curriculum audit tailors to the client’s specific needs. This district is unique in that it implements two distinct ELA curricula. Therefore, the classroom-observation protocol utilized in this audit was ELA-specific, allowing the analysis to address how ELA content was being delivered across K–12 classrooms in the district. Several audit data reports revealed that the district lacked both a districtwide comprehensive, well-articulated written curriculum and local ELA assessments. In addition, data indicated that inequities exist in the support services offered to both teachers and students. Informed by the audit findings, Learning Point Associates collaborated with district personnel to draft an action plan informing the district’s improvement efforts. Currently, student performance in Elkhart Community School District is improving, but the district is still identified as being in need of improvement. However, during the 2007–08 school year, the district met 30 of the 33 annual yearly progress indicators, five more than it had reached the previous year (see *Elkhart 2008 AYP Summary Report* online at <http://mustang.doe.state.in.us/AP/buttoncorpnew.cfm?corp=2305&year=2008>).

Reference



Territory, District, and School Improvement in the U.S. Virgin Islands

From September 2003 through September 2006, Learning Point Associates partnered with the U.S. Virgin Islands (USVI) Department of Education to engage in comprehensive improvement planning at the territory, district, and school levels. Learning Point Associates believes the best path to comprehensive school improvement and increased student achievement is building a system’s capacity to help itself. This goal in USVI was accomplished through sustained, high-quality school improvement and instructional coaching and customized professional development; ongoing, site-based technical assistance; and the consistent application of educational strategies based on evidence from scientific research and rigorous practice.

The USVI project was a broad, three-year initiative serving 18,000 students, 33 schools, and 1,500 teachers. It was executed on three levels—territory, district, and school—and was divided into two phases over the three years. Phase I, which ended in May 2004, focused on developing quality school-improvement plans with the goal of increasing student achievement, improving educator quality, and engaging the wider community in the successful implementation of the plan. Activities included school improvement and instructional coaching; the discovery process (which was dedicated to building relationships; getting to know the educational, political, cultural, and geographical context; and gathering baseline information about the USVI system); Data Retreats; scientifically based research workshops; development of territory, district, and school plans; and evaluation of outcomes and goals.

Phase II focused on building leadership capacity to support continuous improvement through the effective implementation of territory, district, and school improvement plans. Activities included providing school improvement and instructional coaching, assisting schools in monitoring and implementing school improvement plans, delivering high-quality professional development (with an emphasis on literacy and mathematics), providing technical assistance, developing principal knowledge, and evaluating outcomes and goals.

Standardized test results for USVI public schools showed significant improvements in the second year of administering the Iowa Test of Basic Skills as a territorywide assessment. Many of the schools made great strides in raising their national standing, as shown by the national percentile rank based on spring 2005 testing of students in Grades 5, 7, and 11. Of the 33 schools in the territory, 19 had improved since the 2004 administration of the test.



Training and Technical Assistance to the Chicago Campaign to Expand Community Schools and Community Schools Initiative (2003–11)

- Funding agency: Chicago Public Schools
- Funding history: \$600,000 total over a nine-year period
- Client contact: Adeline Ray (aoray@cps.k12.il.us)

Learning Point Associates has provided training and technical assistance to the Chicago Campaign to Expand Community Schools, a partnership of the Chicago Public Schools (CPS) and private foundations and corporations (and now, the Chicago Public Schools Community Schools Initiative [CSI]). The effort to expand out-of-school-time activities and create community schools in Chicago provides a wide variety of funds for 21st CCLC sites, Chicago Campaign-funded sites, After-School All-Stars programs, Afterschool Matters high school programs, and charter schools created through the Renaissance 2010 program. The CSI effort is built on the premise that schools need to provide holistic support for students and their families. This effort focuses on engaging local partners to help bring sustainable resources to schools, particularly schools serving high-poverty students. Each community school program has a resource coordinator who works with a local oversight committee to develop and implement a service plan. Key members of the oversight committee are representatives of the school, the parent body, and community agencies. Since 2003, Learning Point Associates has been a trusted training and technical assistance partner to the effort, providing start-up assistance to new community schools, principal leadership development workshops, data use training, sustainability planning, and communication planning.

21st CCLC Program Support for the Illinois State Board of Education (2002–12)

- Funding agency: Illinois State Board of Education (ISBE)
- Funding history: \$2.5 million total for new five-year contract (2007–12)
- Client contact: Gail Meisner (gmeisner@isbe.net)

Since 2002, Learning Point Associates has been the primary training and program monitoring partner of ISBE 21st CCLC grantees. Over the past three years, we have developed, field-tested and revised protocols to support field-based program reviews, and have conducted more than 150 monitoring and technical assistance site visits. We also have surveyed the grantees to determine program training needs and have provided statewide and regional training to help support efforts toward quality programming and sustainability. In addition, Learning Point Associates has provided new grantee training, bidder’s conference assistance, grant review completion, and data collection assistance for the ISBE 21st CCLC program through in-person workshops, conferences, and online webinars.

Strategic Learning Initiatives (SLI)

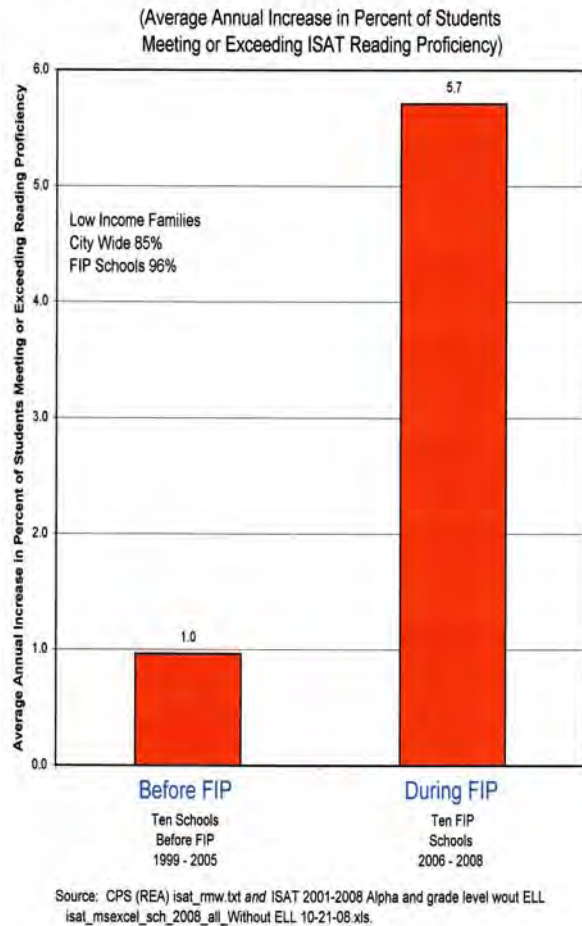
The SLI strategy is grounded on the corporate model of Total Quality Management blended with Effective Schools principles, namely, believing in the ability of all children to learn, the value of the principal as a key instructional leader, and high expectations for success. Our model is the Focused Instruction Process (FIP), a research-based strategy designed by classroom teachers. It is based on the highly successful strategies used by schools and businesses that integrate high performance and continuous improvement principles (Sebring, et. al. 2006; Simmons, 2006).

This model has been very successfully applied within Brazosport Independent School District in Texas. Participating schools in that district achieved remarkable results as measured by the Texas Assessment of Academic Skills rating system. More specifically, by implementing this program, two of the district’s underperforming schools, Fleming and Velasco, received “recognized” ratings for the first time. Velasco school became the first in the district with more than 50 percent of its students in the “economically disadvantaged” category to receive this positive rating. Furthermore, within the first few years of implementing this model in the Brazosport school district, 17 of the 18 campuses had achieved either “recognized” or “exemplary” status, while only five years earlier, nine of these same schools had been labeled as “low performing.”

Since 2006, SLI has worked with a network of 10 low-income, low-achieving Chicago schools to implement the four-year FIP comprehensive school reform model. FIP stresses shared

FIP Schools Improve Five Times Faster Than Before FIP

Focused Instruction Process (FIP) with Ten Elementary Schools ISAT Reading Results Before and During FIP, 1999-2008



leadership, professional development, parent engagement, and applying continuous improvement strategies drawn from best practices identified by educational and management research. Results of the first two years show strong improvement, with the average annual increase in reading scores for the 10 schools improving five times faster than previously (see chart on left). The results may offer promise for school improvement efforts nationally.

In 2006, the chief education officer of Chicago Public Schools asked SLI to apply its strategy for accelerating student and adult learning to a group of 10 elementary schools in low-income neighborhoods. Nine of the 10 schools were on the CEO's list to be restructured or closed; 96 percent of the students came from low-income families. During a period of 10 years, many efforts had been made to improve these schools' results. Leadership had put in place new principals, new teachers, new curriculum, updated professional development, and more; but progress remained elusive.

For the 10 schools, joining the FIP required agreement by the principal, support from at least 80 percent of the teachers through a vote, plus approval by the Local School Council and the chief area officer. The program began in the

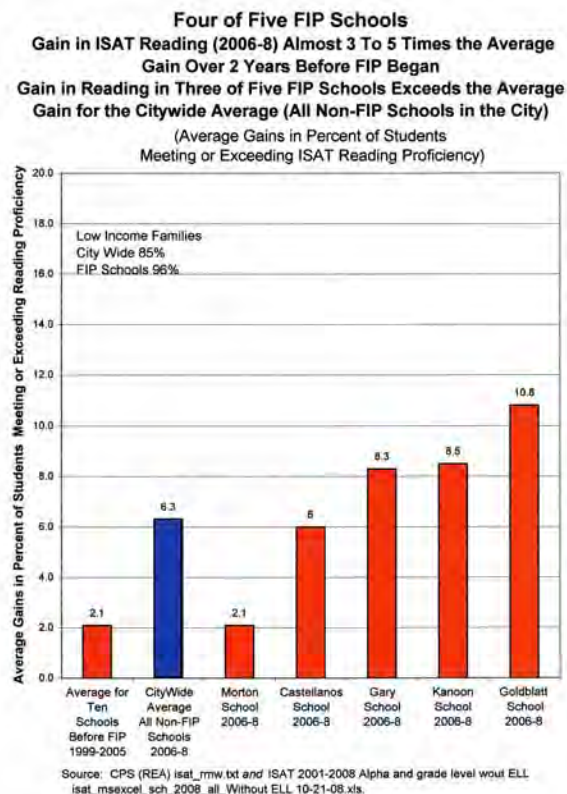
spring of 2006 with a four-day training for the principal and leadership team from each school. Implementation began in the summer, with teachers determining the shared calendar for teaching literacy skills, based on the Illinois Standards, and selecting the assessments for each skill.

Initial Results: Significant Achievement Gains

Results from the first two years of FIP (2006–08) indicate the following:

- For the 10 schools, the average reading score on the Illinois Standards Achievement Test (ISAT) improved five times faster than annual improvement had been before the schools joined the program (see chart below).
- Two schools had the highest gains on the ISAT composite score (reading, math, and science) out of 473 schools in the city: Cather in 2007 from 36.1 percentage points to 50.5, and Cardenas in 2008 from 48.8 percentage points to 71.7.

- Five of the ten schools turned around, three of them in the first year. (*Turnaround* is defined to mean that ISAT scores are improving at least six times faster than previously and school stakeholders themselves consider the school as having “turned around”). All of these turnarounds came without the expense or disruption of removing staff or closing schools. (See chart at right.)
- Four of the other five FIP schools had a gain in reading that was almost three to five times the average gain over the two years before FIP began. (See chart on the right.)
- Second-year results showed faster progress than the first year. The average gain in reading for the 10 FIP schools was 2.8 percentage points in the first year and 8.6 in the second year.
- The citywide average increased 3.4 points in the second year.
- After two years, all 10 had made significant progress on the composite score, and 9 of the 10 had made significant progress in reading.
- The FIP schools’ scores in reading are improving up to 2.6 times faster than those of neighboring schools in the same CPS area that are not part of a Strategic Learning Initiatives network. SLI has a total of 18 schools in the two areas. (See chart.)
- Workshops teaching parents to support classroom work linked to the Illinois Standards had triple the attendance of other parent workshops citywide. (See chart.)
- During the two years, 5 of the 10 schools had leaders new to the principalship: Cardenas, Finkl, Gary, Morton and Tilton. Three of these five turned around.
- Teacher and principal satisfaction with FIP, determined by confidential surveys twice a year, were high at the end of the first year and improved at the end of the second year.



As far as we can determine, the FIP Network may be the most improved educational network in the city as measured by ISAT scores for 2006–2008.

The organizations that have supported SLI both financially and in spirit include some of the largest foundations and corporate giving programs in the Chicago metro area. On the foundation side they include the following:

- MacArthur Foundation
- Chicago Community Trust
- The Field Foundation of Illinois

- McCormick Foundation
- Woods Fund of Chicago
- Lloyd A. Fry Foundation

On the corporate side, Strategic Learning Initiatives has received support from these entities:

- LaSalle Bank
- Blue Cross and Blue Shield of Illinois
- Health Care Services Corporation
- Boeing

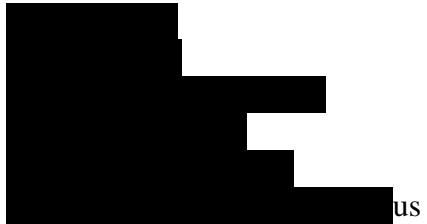
Support from these foundations and corporations has had a direct and positive impact on SLI's work in Chicago's low-performing public schools. We look forward to continuing to expand our work with current foundation and corporate partners and to identifying new organizations with which we can work collaboratively. Further, SLI has helped to establish community/business connections with schools in many other ways.

The first is by means of the districtwide Principal for a Day initiative, which pairs business leaders with schools. SLI President John Simmons has been a part of this initiative for many years. Although this is a one-day annual event, it has yielded many long-time partnerships between community organizations/businesses and schools. Many of the community organizations/businesses have presented their schools with gifts of money, supplies, and volunteers to assist in the enhancement of the school curriculum. This program also gives community partners an idea of what it actually takes to make a successful school.

Another Illinois area business-school partnership that SLI has established is with The Ziegler Companies, Inc. The company is currently organizing a book drive, collecting new books for children in participating schools and to supplement classroom libraries. Ziegler will soon begin a winter clothing drive, wherein its associates will be collecting new or gently used winter outerwear that they will distribute at one or more of our schools to children in need. In the spring of 2010, Ziegler will hold a uniform drive, at which time it will collect monetary donations from staff for new school uniforms. Ziegler also plans to provide one of the participating schools with supplies and is planning on joining Staples Corporation in this effort.

Another company we have collaborated with is AT&T, whose employees supported activities in a Chicago public school. That particular school's team leaders had little or no training or coaching on how to be effective team leaders. AT&T provided a middle-level team leader to attend grade-level team meetings for an hour every two weeks and then provide feedback to the teacher leaders one-on-one after the meetings. Input from AT&T provided direct feedback and offered critically important coaching for the school leaders.

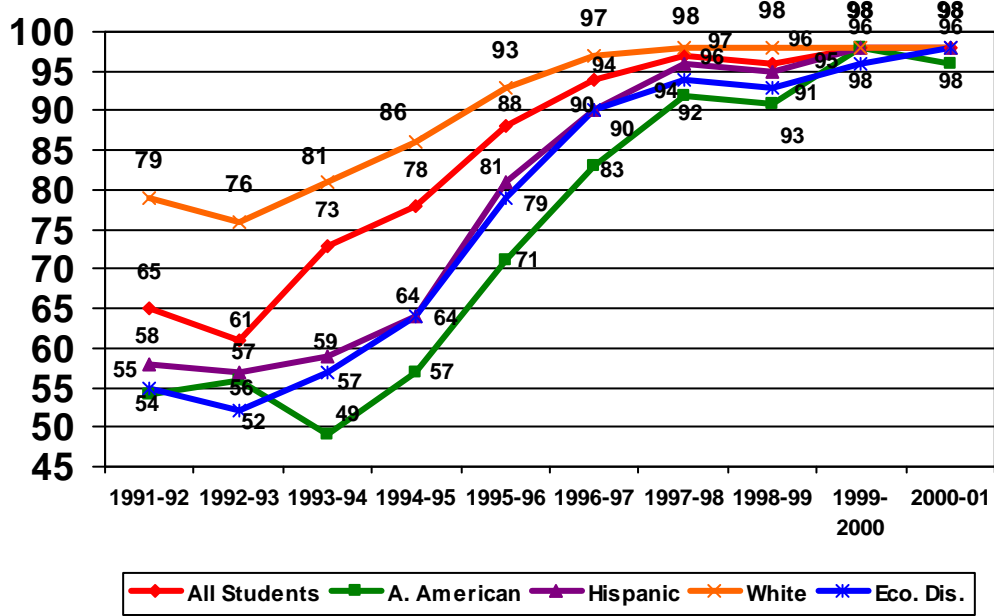
We are eager to replicate and activate these relationships within any new Partnership Zone school districts where we may be working in the future. The following schools may be contacted as references for SLI and the effectiveness of the FIP model:



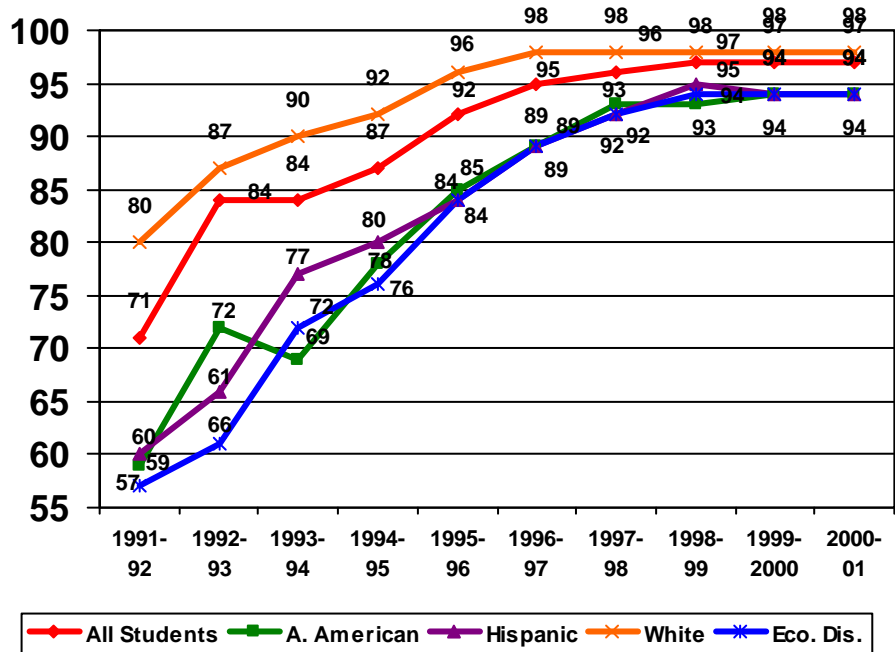
Brazosport Independent School District

After implementing a version of FIP that is similar to SLI's , the Brazosport Independent School District in Texas increased its student achievement rate on state assessment tests for minority and economically disadvantaged students from the 50th percentile to the 92–98 percent range in five years. A school district with 13,500 students, it has a 36 percent economically disadvantaged and a 41 percent minority population. It continues to improve student performance while testing more and more students. (See Reading and Mathematics graphs on following page.)

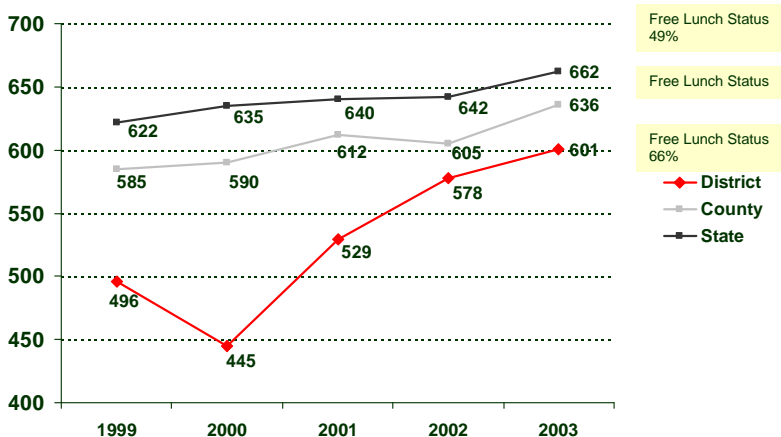
READING



MATHEMATICS



Academic Performance Index for Four High Schools in Fontana, California



The Fontana, California, school district started using the eight-step Focused Instruction process in the fall of 2000, and its students were first tested in 2001. Measured by the Stanford 9 test covering the academic subjects, all four high schools in the Fontana district improved much faster than the rate of change in the rest of the county and state in schools that were not using the eight steps in 2000 through 2003.

Pivot Learning Partners

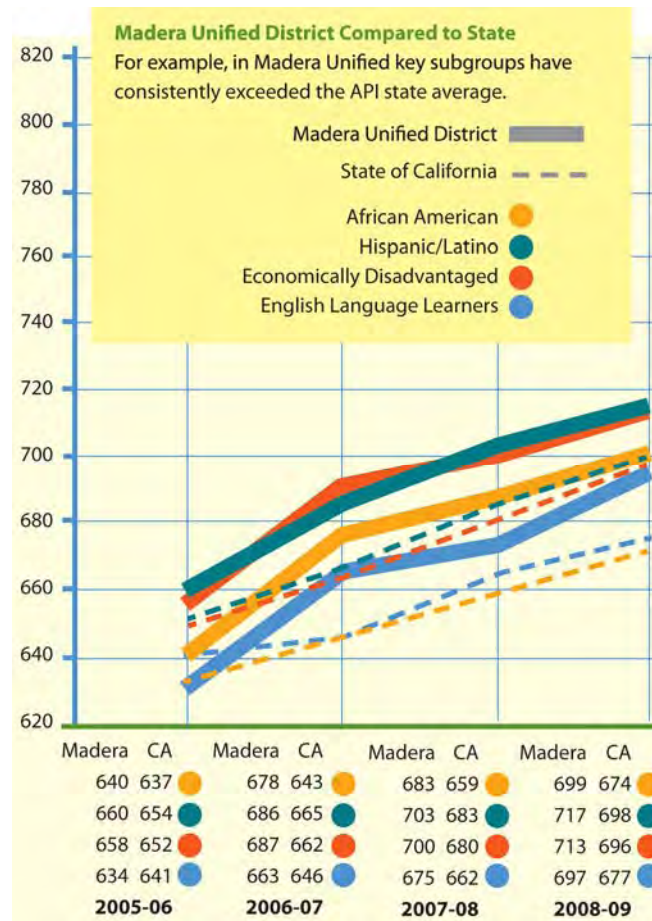
Pivot Learning Partners views school finance reform at the district level as a key component of the whole-system change needed for school districts to dramatically raise student achievement and close the achievement gaps. Pivot Learning Partners has been working on this kind of system change at the district level since 2001, and is currently engaged in almost 50 districts across California. Presently, Pivot Learning Partners staff and coaches include many former superintendents and school business officers with many years of experience working in school finance. In the past two years, Pivot Learning Partners has become one of the largest providers of District Intervention and Assistance Team (DAIT) services in the state of California, which has led Pivot Learning Partners to a more intensive focus on finance reform, especially in low-performing districts. Pivot Learning Partners has developed a software tool called the Resource Allocation (RA) Tool used in many partner districts, which provides principals with a user-friendly way to develop school budgets that put goals, rather than regulations, at the center of the work. This tool was designed on the basis of research from Stanford University's *Getting Down to Facts* study in 2007, which found that principals desire greater flexibility to manage resources within their own schools. In addition, this research found that when given the choice, principals prefer more flexibility over resources—in particular to constraints imposed by state mandates—to simply more resources. They also want greater flexibility to dismiss ineffective teachers. Pivot Learning's RA Tool enables principals and other school leaders to collect data directly through a Web-enabled tool to track budgets aligned to strategic goals, ensuring that resources are not only aligned, but also done so efficiently, easily, and cohesively.

Pivot Learning Partners just recently launched a major school finance reform project, Strategic School Funding for Results (SSFR), to develop and implement more equitable and transparent strategies for allocating resources to schools within each district—and to link those strategies to systems designed to encourage innovation and efficiency, and strengthen accountability for student outcomes. SSFR builds on current research in the field, notably that of its lead partner on SSFR, the American Institute of Research’s *A Tale of Two Districts: A Comparative Study of Student-Based Funding and School-Based Decision Making in San Francisco and Oakland Unified School Districts*. This study examined the implementation of “student-based” funding policies in San Francisco and Oakland school districts and found that although the policies create extra work, they are preferred by district- and school-level staff and, to some degree, result in directing additional funding to schools with greater needs. One of the key implementation partners in this study, former executive director of the Bay Area Coalition for Equitable Schools (BAYCES) Steve Jubb, has joined Pivot Learning Partners as director of innovation and is currently overseeing the SSFR project. In his role as executive director at BAYCES, Jubb helped create some 60 new and redesigned schools in Oakland, Emeryville, Berkeley, and the greater San Francisco Bay area.

Pivot Learning Partners has a long history of improving teaching and learning in underperforming schools. It was founded in 1995 as the Bay Area School Reform Collaborative (BASRC), which was part of the national Annenberg Challenge—an ambitious effort by Ambassador Walter Annenberg to transform schools in major urban areas. The intensive, five-year external evaluation of BASRC by Stanford University’s Center for Research on the Context of Teaching found that the BASRC schools improved more rapidly than a matched sample and that those schools implementing BASRC’s data-based decision-making program, the Cycle of Inquiry, made the most progress. This prompted a second round of funding in 2001 from the Annenberg Foundation and the William and Flora Hewlett Foundation. With this funding, BASRC shifted from a one-school-at-a-time approach to an emphasis on school districts and districtwide change. BASRC also took on the challenge of building a program that would be replicable, scalable, and sustainable—expanding into the Central Valley and the Los Angeles basin in 2004 and 2005—and changed its name to Springboard Schools to better reflect its wider presence in California. Its focus expanded to include district-level and districtwide improvement.

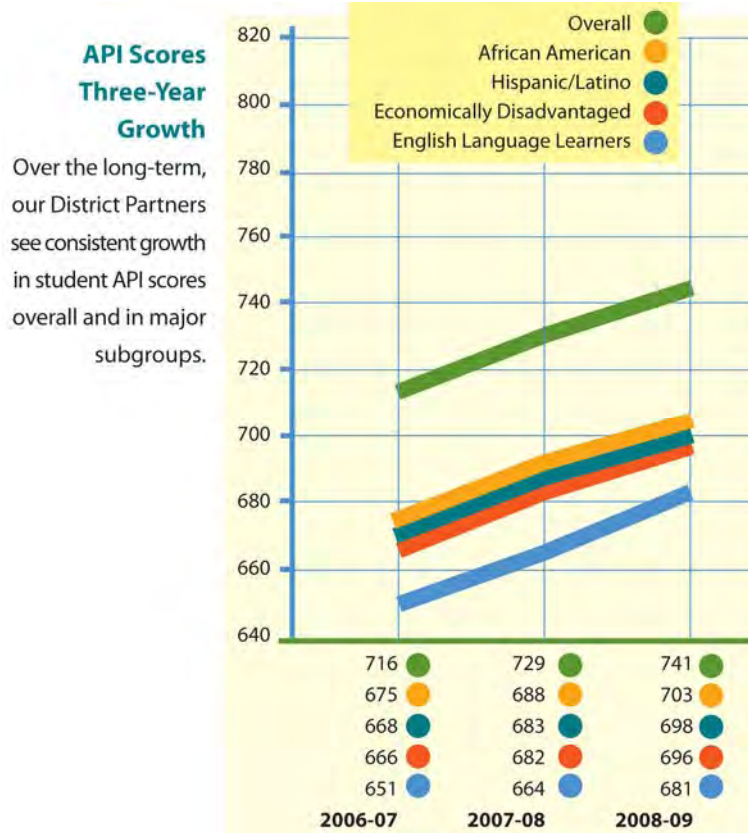
Analysis of data from Springboard partner districts has shown that these districts consistently improve at a faster rate than the state as a whole or than non-Springboard districts. For example, Pivot Learning Partners has been working with Madera Unified School District in California’s high-poverty Central Valley since the 2005–06 academic year. Madera serves approximately 19,000 students and was one of the first wave of California schools districts to be identified as Program Improvement under the No Child Left Behind Act for failure to meet annual yearly progress targets. As shown in Figure 1, Pivot Learning Partners has helped to dramatically increase the proficiency of specific subgroups of underperforming students each and every year.

**Figure 1. Student Growth in Madera Unified
Utilizing the Pivot Learning Partners District Change Model**



In July 2009, Springboard Schools became Pivot Learning Partners, remaining committed to its 15-year history of advancing its mission of working with educators to raise student achievement and close achievement gaps. The Pivot Learning Partners core District Partner Program consists of long-term partnerships with districts around the state. In this network of nearly 50 school districts serving some 750,000 students across California, Pivot Learning brings together its core operating principles of research, professional development, and coaching to create a customized package of support for district-level and districtwide change. Pivot Learning’s commitment to working in districts that serve students in need is reflected in the demographics of its partners. Despite the challenges of educating a diverse, at-risk student population, these district partners continue to improve more rapidly than others across the state, even though they serve a higher population of students living in poverty (55 percent), students of color (60 percent), and students learning English (28 percent). These partner districts range from small, rural districts such as Corcoran Joint Unified with approximately 3,000 students, to Fresno Unified School District, the fourth largest in the state with nearly 80,000 students.

Figure 2. Academic Improvement in Pivot Learning Partners District Partner Network



Over its 15-year history, Pivot Learning Partners has amassed a long track record of successful community partnerships that have resulted in measurable improvement within schools, including the following:

- Paramount Farming Partnership With Central Valley High Schools.** Pivot Learning Partners helped to establish a partnership between Paramount Farming, a large agribusiness operating in California’s Central Valley, and a group of Central Valley high schools serving large populations of English learners. This partnership not only has met the needs of this business—providing it an opportunity to have a much higher level of impact on schools in the communities in which their employees live than ever before—but it also has provided these schools with badly needed resources.
- Madera County Office of Education Partnership With S.H. Cowell Foundation.** Pivot Learning Partners forged a unique partnership situated within Madera Unified engaging the Madera County Office of Education, the S.H. Cowell Foundation, and the district. The Cowell Foundation’s grantmaking—which involves adopting high-need communities and providing cross-sector grants to agencies including law enforcement, social services, and others—has renewed support for leadership development in the district and expanded this partnership in the wider community to include the Madera Family Resource Center for family case management and greater community ownership.

References

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Fiscal and Management Capabilities

a. Organizational Description

Learning Point Associates (www.learningpt.org) is a nonprofit 501c(3) educational organization with more than 25 years of direct experience working with and for educators and policymakers to transform educational systems and student learning. The national reputation of Learning Point Associates is built on a solid foundation of designing and conducting rigorous and relevant education research and evaluations; developing and delivering tools, services, and resources targeted at pressing education issues; and analyzing and synthesizing education policy trends and practices. Core competencies include afterschool services and expanded learning opportunities, district and school improvement, educator effectiveness, literacy, and educational technology. Our professional staff of 165 continues to grow as our work expands. Currently, we have offices in Chicago; Washington, D.C.; Naperville, Illinois; and New York City.

Learning Point Associates manages a diversified portfolio of work of more than \$28 million annually ranging from school- and district-based consulting to major federal contracts and grants. Examples of multiyear federal contracts include REL Midwest, the National Comprehensive Center for Teacher Quality, Great Lakes East Comprehensive Center, Great Lakes West Comprehensive Center, the recently completed Center for Comprehensive School Reform and Improvement, the newly established National Charter School Resource Center, and 21st Century Community Learning Centers (21st CCLC) Analytic and Monitoring Support.

Strategic Learning Initiatives (SLI) is a Chicago-based nonprofit organization dedicated to accelerating student and adult learning by integrating the best research from education and high-performance organizations to turn around the lowest performing schools. Our capacity enables us to guarantee that participating schools will improve their scores if they get the commitment from their school leadership teams and district leaders in implementing and monitoring SLI's improvement process. It is called the Focused Instruction Process (FIP) to emphasize the instructional focus.

While its roots are in Chicago, SLI strategies and tools are research-based and reflect the most effective national practices. SLI capacity is grounded on 20 years of work with individual schools, networks, and district leadership to continuously improve classroom practice. SLI also supports districts in building their capacity to scale up and sustain improvements over time. SLI's short-term outcomes include demonstrating that underperforming schools not only can turn around their results in core subjects (e.g., reading and math as measured by the Illinois Standards Achievement Test scores), but also begin to transform the school culture. SLI's longer term goal is to encourage schools to adapt the model to their unique conditions. SLI schools and districts accomplish these results through their application of the comprehensive school improvement model FIP, based on the Essential Supports and developed by the Consortium on Chicago School Research. It focuses on improving the quality of the schools through shared leadership, professional development of teachers and principals, the eight-step instruction process, and parent engagement by helping children learn at home. While implementing this model, school leaders are building a culture of trust and the continuous improvement of daily work.

Pivot Learning Partners was founded in 1995 as the Bay Area School Reform Collaborative. BASRC was part of the national Annenberg Challenge—an ambitious effort by Ambassador Walter Annenberg to transform schools in major urban areas. An intensive, five-year study by an independent research team at Stanford University documented that test scores in schools using the BASRC approach rose faster than those in a matched sample of schools, and prompted a second round of funding in 2001 from the Annenberg Foundation and the William and Flora Hewlett Foundation. With this funding, BASRC shifted its focus from a “one school at a time” approach to an emphasis on school districts and districtwide change. BASRC also took on the challenge of building a program that would be replicable, scalable, and sustainable—expanding into the Central Valley and the Los Angeles basin in 2004 and 2005, and changed its name to Springboard Schools to better reflect its wider presence in California.

The Pivot Learning Partners core District Partner Program consists of long-term partnerships with districts around the state. In this network of nearly 50 school districts serving some 750,000 students across California, Pivot Learning brings together the three strands of research, professional development, and coaching to create a customized package of support for district-level and districtwide change. Pivot Learning’s commitment to working in districts that serve students in need is reflected in the demographics of its partners. Despite the challenges of educating a diverse, at-risk student population, these district partners continue to improve more rapidly than others across the state, even though they serve a higher population of students living in poverty (55 percent), students of color (60 percent), and students learning English (28 percent). These partner districts range from small, rural districts such as Corcoran Joint Unified with approximately 3,000 students, to Fresno Unified School District, the fourth largest in the state with nearly 80,000 students. Over the past five years, Pivot Learning Partners has experienced tremendous growth in the depth and breadth of its engagements with school district partners. Between 2004 and 2009, Pivot Learning grew from serving just four districts representing 100,000 students to 65 districts representing more than 860,000 students. More than 120 Pivot Learning-trained and certified coaches provided services in these districts in 2008–09. In addition to increasing its revenue to become a sustainable, yet cost-effective support provider to school districts, Pivot Learning Partners also deepened its work with individual district partners as measured by average contract size through which Pivot Learning has built a proven track record of success.

b. Legal Entity

Learning Point Associates will be the legal entity that will undertake the services described in the proposal.

c. Staff Qualifications

Learning Point Associates

Learning Point Associates, Strategic Learning Initiatives, and Pivot Learning Partners propose key staff who are uniquely qualified to manage and deliver the services described above. Staff are proposed in a key role to align with budget personnel categories.

In addition, staff with evaluation and research expertise also will implement and monitor the outcomes-based measurement plan. Additional staff will support each service; they are included in Appendix A. (Resumes for all staff are included in Appendix A.)

Jessica Johnson, chief officer of the District and School Improvement Group at Learning Point Associates, will oversee all aspects of proposed scope of work and serve on the Illinois Partnership Zone Council. She oversees work in curriculum audits, improvement planning, curriculum alignment and development, literacy, data use, and other customized projects in this area. She also has been directing work in collaboration with state-level staff on a variety of American Recovery and Reinvestment Act (ARRA) funding opportunities. Prior to this, she led the design and implementation of a nine-month curriculum alignment audit for 10 large school districts in corrective action. Her work focuses on assisting states and large school districts to gather data, assess their situation, and develop short- and long-term action plans to improve student achievement. Her responsibilities include program and project management, quality assurance, and service development. She has managed several key projects at Learning Point Associates including the New York State Curriculum Alignment Audit 2005–06 and 2006–07. Johnson earned her master’s degree in public policy from the John F. Kennedy School of Government at Harvard University. She has professional development and consulting experience in both the private and public sectors.

Cary Cuiccio is senior program manager and team lead in District and School Improvement Services at Learning Point Associates. Ms Cuiccio will serve as a project manager for School Turnaround. She acts as project director for the New York State Curriculum Audits, guiding an innovative approach to multivariate data collection and collaborative interpretation to help districts in corrective action use data to develop concrete action plans for improvement. Cuiccio also provides quality assurance on issues specific to the work of Learning Point Associate in New York City, in addition to managing client relationships, building strategic partnerships with local stakeholders, and representing Learning Point Associates to a variety of constituencies in the wider education community. Previously, Cuiccio was an independent consultant in New York City, providing organizational development and strategic planning services to the nonprofit and public sectors, including the New York City Department of Education. She is a skilled project manager, group facilitator, and team builder and has 13 years of experience negotiating the implementation of school improvement reforms in large urban systems, coordinating technical assistance, and facilitating the development of strategic plans to optimize organizational growth and development. Cuiccio received her bachelor’s degree from Carleton College.

Dawn Dolby is a senior program associate with the district and school improvement services group at Learning Point Associates and will serve as a lead school consultant and provide direct services to turnaround schools and coordinating services of subcontractors and content experts.. Dolby has nearly 25 years of educational experience as a teacher, professional development trainer, and school improvement specialist. At Learning Point Associates, she has provided technical assistance for states and districts in need of improvement, worked with district teams to improve their educator talent through mentoring and induction practices, facilitated data interpretation sessions with teachers and leaders, and designed professional development in a variety of areas, including curriculum, examining student work, and technology integration. She also led the mathematics team for the Learning Point Associates contracted work with the New York State Education Department to conduct audits of the written, taught, and tested curriculum

in multiple districts. Her position requires management of staff, projects, and budgets. Dolby has worked with schools in districts in more than 25 states and has successfully supported numerous schools in comprehensive reform efforts leading to improved student achievement and corrective action status. Over her years in education, she has taught and provided professional development and technical assistance in urban, rural, and suburban schools. Dolby earned her master's degree in instruction and curriculum from the University of Colorado–Boulder.

Lisa Palacios, a senior program associate at Learning Point Associates, will serve as a lead school consultant and provide direct services to turnaround schools and coordinate services of subcontractors and content experts. She has led several large-scale projects, including seven district curriculum audits for low-performing districts in the state of New York and New York City. She also leads all data work in district and school improvement and for the *Surveys of Enacted Curriculum*, a survey used in 34 states. In addition, she delivers services for elementary and middle school mathematics. Palacios was instrumental in the evolution of the curriculum audit process and has done the fieldwork, the process facilitation, and the management of large-scale audits. She mentors and trains Learning Point Associates personnel in the audit and school improvement processes. She has experience in responding to large-scale RFPs and recently helped VA STAR, a Learning Point client, win a Productivity Investment Fund grant. Palacios currently serves on the VA STAR Advisory Board. Previously, she worked as the director of instructional technology and director of information technology at two Illinois school districts. She was responsible for an annual multimillion-dollar budget; instructional technology projects and grants; technology professional development for certified and classified staff; employee, financial, and student management systems; the districtwide data network; cable and telephony; purchase and maintenance of all computer equipment and peripherals, software, and technology; curriculum adoption; and a district technology plan and website. Palacios earned a master's degree in education from Illinois State University.

W. Christine Rauscher, Ph.D., will serve as lead school consultant, provide direct services to turnaround schools, and coordinate services of subcontractors and content experts. Dr. Rauscher is a senior literacy associate in the Professional Services Group of Learning Point Associates where she develops services and products to address the literacy needs of all students and provides professional development to educators to enhance the literacy achievement of students. Prior to joining Learning Point Associates, Dr. Rauscher had more than 20 years of executive school leadership experience as an associate superintendent. She was a consultant in the Teaching and Learning Services Bureau of the Iowa Department of Education. She was president of the Iowa Reading Council, a state affiliate of the International Reading Association. Dr. Rauscher has taught graduate-level courses focusing on effective literacy instruction as an adjunct faculty member at several universities. She earned a doctorate degree in reading, educational leadership from the University of Iowa.

Frank E. DeRosa is a senior consultant at Learning Point Associates and state manager to the Indiana Department of Education for Great Lakes East Comprehensive Center. He will provide technical expertise for high school turnaround. He provides technical assistance and consultation for the Indiana Department of Education. DeRosa also has provided technical assistance and consultation to the Ohio Department of Education concerning its new “credit flexibility” policy and to several state and regional offices and school districts involved in the school improvement process. Since 2007, he has served as team lead for audits of the English language arts

curriculum for districts in NCLB corrective action, under contract with the New York State Education Department. DeRosa has 36 years of experience in public school education as a teacher and administrator. He has extensive experience in school administration, including a position as principal of a large high school in a diverse suburban district. DeRosa has a strong background in school improvement, high school reform, special education, and leadership team building. He earned a master of arts in teaching degree from National-Louis University.

Gretchen Weber, a senior program associate at Learning Point Associates, will provide technical expertise in teacher and leader effectiveness. She provides expertise for teacher-quality policy, publications, products, and technical assistance. Within the work of the National Comprehensive Center for Teacher Quality, Weber coordinates the technical assistance for the regional comprehensive centers, including the capacity-building convenings, such as issue forums and the annual conference for the center. She leads the consultation and technical assistance services on induction and mentoring for multiple Illinois school districts, serves as a member of an Illinois policy team focused on induction and mentoring, and has contributed to the writing of induction program standards for the state. Weber has worked with a wide range of student populations in suburban and urban settings. Having served in a leadership capacity during her years teaching, she acted as a technology facilitator, mentor, and lead teacher to provide technical assistance and professional development to assist teachers in improving the implementation of technology and differentiated instruction in reading, writing, and mathematics. Weber has presented nationally and locally to deliver professional development to many audiences and is a National Board Certified teacher. She earned a master of education degree in curriculum and instruction from National-Louis University.

Danielle Carnahan is the senior literacy team lead at Learning Point Associates and will provide technical expertise in literacy and curriculum. She is a skilled project and content manager who is dedicated to quality assurance and also oversees the content work in multiple projects at the organization. Her work experience bridges multiple levels of the educational system. Carnahan is active in the field of literacy at the national level as a member of the steering committee for the National Adolescent Literacy Coalition and an invited member of the Wisconsin Adolescent Literacy Task Force. She has served as a reviewer for state-level literacy publications for other professional organizations. In her role as the facilitator of the Wisconsin Adolescent Literacy Task Force, Carnahan worked to assist the state in the engagement of various stakeholders in the inspection of research that was then incorporated and translated into an actionable state-level plan. She has assisted more than 10 states with the rollout of federal reading programs, which included plans for competition for funds, the running of the subgrant system, coordination of an evaluation system, provision of professional development services, as well as support services to district and school agencies. In other portions of her work, Carnahan has served in a consultant capacity to many of the major school districts in the United States, as well as worked closely with many smaller districts. Initiatives have focused on the design and coordination of instructional systems, the use of standards and district-created benchmarking indicators, use of formative assessments, alignment and provision of professional development to district goals, and the use of data. Carnahan also has served as the project manager for nine district-level literacy-focused curriculum audits. In her role at Learning Point Associates, she works to blend her school-level knowledge with current research studies and practices. Carnahan also assists with the implementation of policy at state, district, and school levels. Her experience

as a teacher and literacy leader in a large urban district allow her to provide meaningful and substance-orientated professional development sessions. Her research interests currently focus on two random control trails for the Institute of Educational Sciences. These studies are focused at the middle and high school levels and are designed to inform the literacy field on the use of formative assessment as well as the implementation of content-area reading practices. Carnahan has presented at national and state-level conferences in sessions focusing on various literacy topics.

Strategic Learning Initiatives

The three SLI program teams are staffed with teachers, principals, and parents who have usually turned around their own schools, and have successfully turned around others. The following consultants from SLI will provide direct service to school leaders and teachers. The staff below will supervise additional consultants in the implementation of the FIP model, participate in school-level needs assessment and action planning, and assist in report of school progress to district and state agencies.

John Simmons is president of Strategic Learning Initiatives (SLI). For the past 35 years, Simmons has worked in K–12 education in the United States and abroad. He has supported more than 40 public schools in Illinois and has consulted for the CEO of the Chicago Public Schools. He helped establish a national research collaborative for evaluating student work and helped design the Chicago Academy for School Leadership, established by the Chicago Principals and Administrators Association and the Chicago Board of Education. He recently helped launch The Turnaround Schools Network, a national membership organization to improve and support research-based, comprehensive turnaround models. Simmons’ current work emphasizes the Focused Instruction Process (FIP), a successful model of whole-school improvement to accelerate student and adult learning and turn around their results. The model improves student performance across an urban school district by bringing together the best strategies and tools from education and corporate experience. His book, *Breaking Through: Transforming Urban School Districts*, was published by Teachers College Press in early 2006. Simmons received a B.A. in history from Harvard University and a Ph.D. in Economics from Oxford University, England. In 1994, the American Society for Training and Development honored Simmons with its Outstanding Achievement in Employee Involvement award. The Erikson Institute gave him an honorary degree for this work in school reform in 2003.

Karen L. Morris is director of educational programs at SLI, where she designs educational materials used in the Focused Instruction Process (FIP). Morris also works as a project coordinator for the Urban Leadership Ed. D. Program at the University of Illinois–Chicago where she contributes to leadership in education curricula. She has served as a leadership coach for the Urban Leadership Ed. D. Program at the University of Illinois–Chicago and as an adjunct professor of curriculum at the Chicago Arts in Education Project for National-Louis University. Prior, Morris was principal at Maria Saucedo Scholastic Academy in Chicago and an assistant principal/counselor at the Lazaro Cardenas School of Chicago. She holds a B.S. in elementary education from Western Michigan University and an M.S. in education/instructional leadership from the University of Illinois–Chicago.

Patricia Davenport is an educational consultant with SLI. Her career is dedicated to supporting school districts in their efforts to achieve systemic change through instructional process and

design training, data disaggregation, and the integration of quality tools and effective-schools research. Davenport was also instrumental in a school change initiative to close the gap in student achievement at Brazosport ISD in Freeport, Texas. Brazosport won the Texas Quality Award, the first school district to earn that distinction. In her 30 years of teaching, Davenport has held the following positions: language arts and reading teacher for Grades 6–12; district counseling supervisor, K–12; director of career and technology education, K–12; and assistant superintendent of curriculum and instruction, K–12. She has a B.S. in education from Texas State University and an M.S. in education from the University of Houston. She is also certified in K–12 management and K–12 counseling (both from the University of Houston).

Susan Jensen is a consultant at SLI, where she works with a group of Chicago Public School (CPS) principals with a focus on implementation and monitoring SLI's Focused Instruction initiative pilot through CPS schools. Jensen concentrates on the improvement of teaching and learning in the area of language arts. Prior, she served as the principal of Chicago's Finkl Academy. In this capacity, she was instrumental in increasing ISAT composite scores from 23.3 percent in 2000 to 79.5 percent in 2007. Her responsibilities included selecting, monitoring, and evaluating 73 staff, as well as curriculum and programs for 850 students. Jensen also led strategic and tactical improvement planning and managed Finkl's \$2.5 million budget. She has worked as assistant principal of Gray, Finkl, and Drummond elementary schools in Chicago. Jensen has a B.S. in elementary education as well as a M.Ed. in reading and learning disabilities from DePaul University.

Betty Green, a high school capacity development consultant for SLI, is an educational administrator with extensive experience in vocational/technical education and career academies. She also is a teacher and principal, a pioneer and leader in creation of vocational schools, career academies, smaller learning communities, contract schools, autonomous small schools, schools-within-schools, and unique school designs individualized for specific school districts and/or local schools. Green has a B.S. in business education from Illinois State University–Normal, an M.A. in curriculum and instruction from Roosevelt University, and an Ed.D. in administration and supervision from Roosevelt. She was selected as Distinguished National Principal, National Big Picture Group; named an Annenberg National Fellow, Annenberg Institute; and honored as a leader of one of the nation's Five New Urban High Schools by the U.S. Department of Education.

Kathy Berry serves as vice president of operations at SLI and is responsible for finance, human resources, and office management. Berry also works directly with SLI's director of educational programs to ensure quality and coordination among programs. Prior, Berry was SLI's director of professional development, where she led all teacher-centered activities. She also facilitated and assisted in the design of a variety of workshops, coaching sessions, and other training opportunities, examples of which include *Peer Coaching*, *Teacher Facilitator Training*, *Differentiated Instruction*, and *Teaching Strategies for Success*. Berry also worked at the Johnson School in Chicago for six years where she codesigned a new lesson plan book, facilitated the assessment team, and led staff development in alternative assessments. Berry has participated in a national collaborative for Looking at Student Work since its formation in 1998 at the initiative of the Annenberg Institute for School Reform and Project Zero at Harvard University. She is a certified teacher with a B.A. in elementary education from North Central College and an M.Ed. in curriculum and instruction from National-Louis University.

Charlotte Ann Blackman, Ed.D., is a shared leadership manager at SLI. She joined the SLI team in 2003 and has served on the management team for planning, marketing, and school support. Her focus is on developing teaching and learning practices that support teacher renewal and student achievement, classroom management, and educational leadership. Blackman worked in the Chicago Public Schools for 34 years as a teacher, counselor, teacher facilitator, and principal (Chalmers Specialty School in North Lawndale). Since 2001, she has served as a principal coach for the Leadership Initiative for Turnaround and the Office of Principal Preparation and Development. Blackman also chaired a Local Professional Development Committee (LPDC) for recertification in Illinois, interviewed teacher candidates for Chicago's Alternative Certification Program, and reviewed portfolios and served as a process observer and consultant for the School Development Program at Yale. She has a B.S. and M.S. in education science from Chicago State University, and a doctorate in curriculum and instruction from Loyola University of Chicago.

Pivot Learning Partners

Pivot Learning Partners is a nonprofit network of educators committed to raising student achievement and narrowing the achievement gap. Pivot Learning draws on a highly experienced team of school district practitioners and technology professionals who have worked with local schools. Key project staff members include the following people.

Steve Weill, an experienced educator with more than 35 years working at multiple levels of the public education system, will serve as Co-Project Lead. Weill brings a wealth of experience in high school settings, serving for 14 years as a principal and director of alternative education programs. He also has served as a classroom teacher, teacher leader, and site administrator as well as assistant superintendent of both curriculum and instruction and educational services at Clovis Unified School District in his native California's Central Valley region. Weill joined Pivot Learning Partners in 2007 and has worked as a coach and project lead in six different school districts, including both middle and high school principal coaching and leading professional development for teacher leaders facing the challenges of English language learners at the secondary level.

John Schmitt, Ed.D., brings 30 years of experience in teaching, curriculum management, and site and district leadership. Schmitt, who began his career as a high school teacher, will serve as Co-Project Lead. After teaching in Torrance Unified School District in southern California, he held positions in site leadership and curriculum, as high school principal, and two superintendencies in the district—one as assistant superintendent of Educational Services and as associate superintendent. He has served in numerous leadership positions in the community, including regional director of the Association of California School Administrators. Schmitt has garnered many accolades for his educational leadership, including the California Distinguished School Recognition Award as principal of two high schools. He holds a master's degree in industrial education from California State University at Long Beach, and a doctor of education in educational administration from the University of Southern California.

Merrill Vargo, Ph.D., executive director of Pivot Learning Partners, is an experienced academic and a practical expert in the field of school reform. Dr. Vargo was hand-picked by an elite group

of Bay Area educators and philanthropists to create the Bay Area School Reform Collaborative (BASRC), now Pivot Learning Partners, in January 1995. BASRC was one of nine urban school reform initiatives in the Annenberg Challenge funded by the Philadelphia-based Annenberg Foundation and became one of only four of the 19 Challenge sites to show achievement strong enough to win renewed grants from its original funders, the William and Flora Hewlett and Annenberg Foundations. Prior to founding BASRC, Dr. Vargo spent nine years teaching English in a variety of settings, managed her own consulting firm, and served as executive director of the California Institute for School Improvement. She also served as director of regional programs and special programs and special projects for the California Department of Education, where she provided leadership to several key school-reform efforts, including the SB 1274 School Restructuring Initiative, Charter Schools, Goals 2000, and the School Improvement Program. Dr. Vargo received her B.A. and Ph.D. in English literature as part of Cornell University's Ford Foundation-funded Six Year Ph.D. Program. She will provide strategic and management oversight of the project.

In addition, Pivot Learning Partners plans to retain the services of a small cadre (three to five) of expert coaches to carry out the scope of work, drawing on its extensive network of more than 120 trained and certified coaches experienced in the fields of school-level leadership systems, capacity building, resource alignment, and operational flexibility.

d. Financial, Organizational, and Technical Resources

Organizational Capacity

As a nonprofit organization that has been committed to educational excellence for more than 20 years, Learning Point Associates works to achieve an education system that serves all learners through equity and access to opportunity. The staff at Learning Point Associates is highly qualified, and our clients come to know us by name and face. We work hard and smart to build trust and confidence, and we never lose sight of the need to be responsive, flexible, and task focused.

Learning Point Associates has more than two decades of experience in codeveloping goals and defining outcomes with teachers, administrators, schools, districts, and larger education systems. We do not just watch—we participate in a process of continuous improvement as it helps transform education systems and improve student learning. We are a solid organization with long-term sustainability, credibility, partnerships, dedicated staff, and very satisfied customers.

The vision of Learning Point Associates is an education system that works for all learners, and its mission is to deliver the knowledge, strategies, and results to help educators make research-based decisions that produce sustained improvement.

Staff members for all projects at Learning Point Associates are selected carefully for particular expertise and experience in doing the same or related work. The staff at Learning Point Associates is qualified, diverse, and professionally committed to the work and philosophy of the organization, including the belief in the power of ownership for making change happen. We have over 160 staff and several more consultants who can be available to conduct this work.

We have demonstrated our ability to scale up quickly through our work in New York, which started with five districts in Year 1 and peaked at more than double that in Year 3. Through targeted recruiting and comprehensive project orientation sessions, we were able to quickly grow our capacity to do the work. We envision employing the same practices to this work in order to meet future demand. In addition, where possible, we build capacity of local consultants to work effectively with the schools.

Learning Point Associates has significant expertise in curriculum design, instruction, professional development, and systemic organizational improvement as evidenced in our professional services experience and research and evaluation with state education agencies and school districts. Because the organization maintains a current database on emergent research and practice in these areas and our staff has expert skill sets that include these areas of expertise, our work is informed by the most up-to-date research and critical thinking. In addition to providing extensive consulting and technical assistance in these categories (see our documented experience), we also publish research, reports, and training materials for use in state education agencies and school districts.

Learning Point Associates has deep procedural knowledge and experience that informs its project work. Learning Point Associates shares what it knows and learns with its clients and constituents through publications, websites, and presentations. The Learning Point Associates voice to the field includes findings from rigorous research, best practice, and practical wisdom. Its publications range from policy recommendations to practical guidance for teachers and administrators.

Learning Point Associates has a strong institutional structure—including systems of communication, collaboration, integration, risk management, and coherence—that allows for the effective management of both large and small contracts. The work Learning Point Associates is proposing includes many complex processes that require attention to detail. The individuals proposed to staff the project are highly qualified, strong leaders and are experienced at managing large projects conducted in collaboration with subcontractors.

The project management process is based on *A Guide to the Project Management Body of Knowledge*, an American National Standards Institute standard methodology. It was created by a certified project management professional at Learning Point Associates.

Financial Resources

Learning Point Associates is dedicated to fostering a sound financial structure. Each year, the organization makes an effort to identify and focus on best practices in the financial industry that, if implemented, can help improve our support capability and provide a stronger financial structure. Learning Point Associates strives to select the most cost-effective mix of practices that meet functionality requirements and balance time efficiently with the needs of staff, funders, and clients.

Policies and Procedures

The organization maintains and adheres to policies and procedures to strengthen its traditional financial management and accounting functions. Specifically, Learning Point Associates has procedures in place to ensure that all costs are (1) reasonable and necessary for the proper and efficient performance and administration of all federal and nonfederal awards, (2) authorized or allowable under contract and federal laws and regulations, (3) treated consistently, (4) in accordance with generally accepted accounting principles, (5) properly allocated to all federal and nonfederal awards, and (6) adequately documented. These guidelines are maintained by the following internal controls:

- Prior approval of transactions (e.g., time reporting, purchases) by the appropriate authority
- Expenditure approval process
- Manual checks and balances of computer-generated reports
- Justification and back-up requirements for all transactions

To ensure that all staff members are familiar with documentation and compliance regulations, Learning Point Associates has produced and routinely updates its Business Policies and Procedures manual on purchasing, travel, independent contractors, and payroll and timekeeping. The agency also provides periodic updates for staff on federal compliance and accountability, budget manager training, independent contractor training, and new employee orientation to business policies and procedures.

In addition, Learning Point Associates maintains general accounting controls in the following areas:

- Financial accounting and reporting
- Proper segregation of duties on financial processes
- Adequate training for accounting personnel to ensure that they maintain the competence required to fulfill their responsibilities
- Adequate protection of assets and records in the form of property insurance, password security to computer terminals and installations, and physical protection in case of accident (e.g., data stored on tape backups off-site)

Accounting System

In addition, Learning Point Associates utilizes a “best of breed” business and accounting software package, GCS Costpoint. GCS Costpoint software was designed to comply with government regulations and meets with consistent approval in Defense Contract Audit Agency audits. This software has the capabilities to meet the organization’s needs and provide an accurate and complete accounting for federal and nonfederal awards.

Reporting

Learning Point Associates reports program outlays and program expenses on the accrual basis. Accordingly, expenses are recorded when a liability is incurred, and revenue is recorded when earned. In addition, Learning Point Associates maintains records and reports in such a form that contains the information as required by its funding sources. Learning Point Associates maintains accounts and documents that permit expeditious determination of the status of funds and the levels of service. This includes the disposition of all money received from its funding sources and the nature and amounts of all charges claimed against such funds.

Additional Evidence of Adequate Financial Resources

The following documents are in Appendix C:

- Form 990 2007–2008
- Consolidated Financial Reports 2007–2008
- Certificate in Good Standing
- Illinois Business License

Additional Information

Exceptions to the RFSP

Learning Point Associates does not have any exceptions to the RFSP.

Contracts With ISBE

See Appendix B.

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