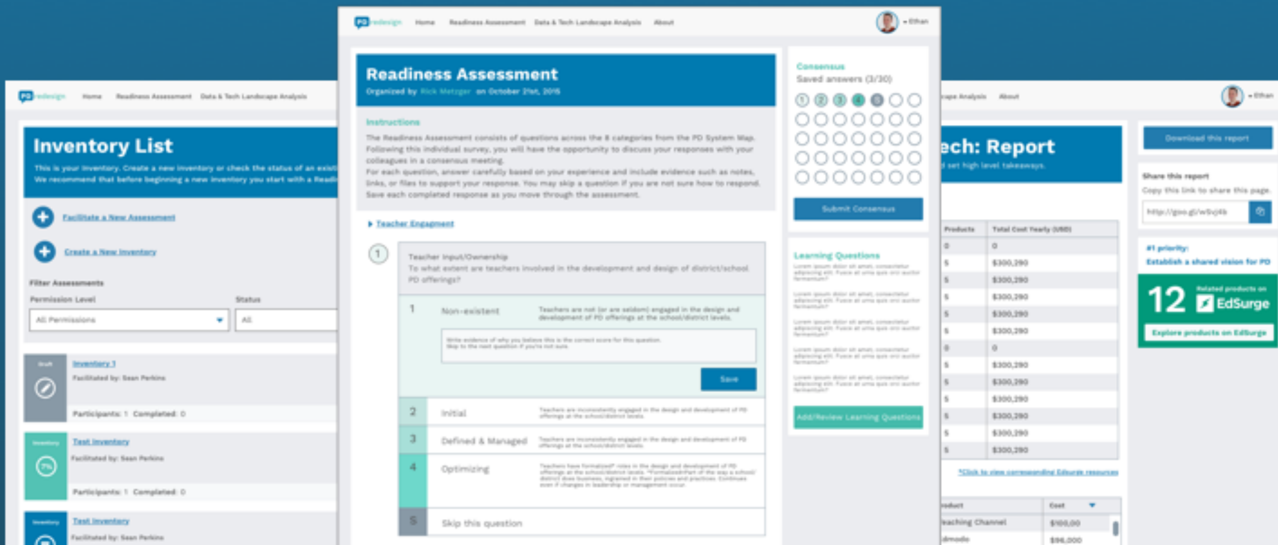

PDredesign Facilitation Guide

May 23, 2016

PDredesign Toolkit Facilitation Guide

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Introduction

PDredesign Toolkit

The PDredesign Toolkit supports districts and schools to transform professional development systems so that they better support classroom teachers. The tools, including interactive assessments, surveys, and inventories, are co-designed with educators to meet their needs. The resulting reports provide users with actionable qualitative and quantitative data to design and implement a system to reach local goals. Combined reporting across tools helps districts connect the dots, and smart recommendations guide districts to take the next step.

The Bill and Melinda Gates Foundation has funded the development of these tools so that districts can use them free of charge. These tools were built using an open source license, so anyone who would like to improve upon or develop new tools is free to do so.

The order in which we present the tools is the order they are designed to be used to enable successful redesign in a district. After completing the Readiness Assessment, Data & Tech Inventory, and the Data & Tech Analysis, you should have insight into your district's strengths and weaknesses relative to professional development. Finally, using the tools to assess the landscape of PD within your district is effective only when actionable items stem from the tools. Understanding the efficacy and cost of tools relative to the overall priorities of the district is vital to improving PD in your system within budget.

Readiness Assessment

Readiness Assessment Overview

The Readiness Assessment helps a district, charter management organization (CMO), or independent school understand how its current PD system is structured and where to focus collective energy for improvement. Through a collaborative process, the assessment brings together voices from the central office, school buildings, and classrooms to ensure transformation is grounded in a collective vision.

The Readiness Assessment is a formative tool used by districts to continuously track transformation progress. The tool enables district personnel across departments to participate in an individual online survey followed by a collaborative, in-person consensus meeting. The consensus meeting results in a collective vision for redesign and a summary report of priority areas and next steps.

As a facilitator, you will:

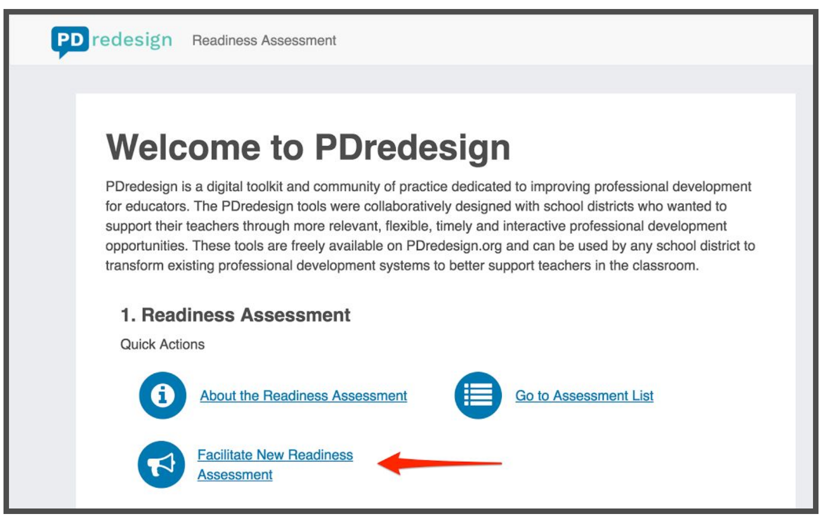
1. Create a new Readiness Assessment and schedule a due date for the survey.
2. Invite participants and other facilitators.
3. Ensure each participant has completed the survey and send reminders to those who haven't.
4. Set a date for the consensus meeting.
5. Submit the consensus once it has been completed during the meeting.
6. Review the report and add any high level takeaways your team has.

Readiness Assessment Setup

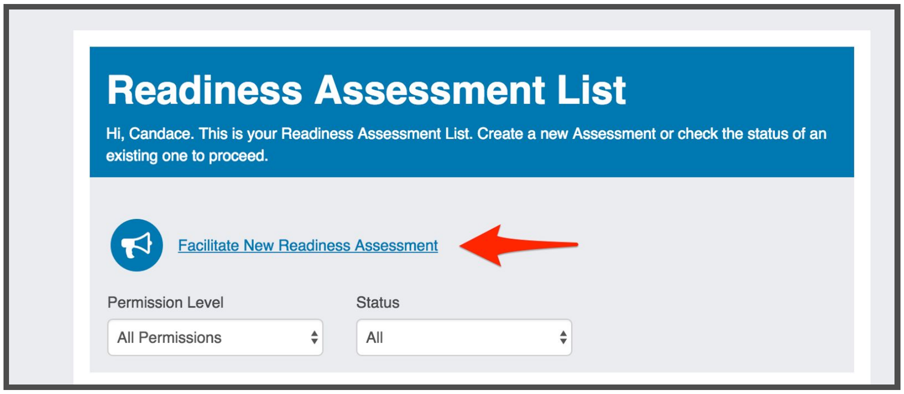
When you start a new Readiness Assessment, you are automatically made a facilitator. Creating a new Assessment can be done in three easy steps!

1. Click Facilitate New Readiness Assessment.

You can start a new Readiness Assessment on your homepage or in your Readiness Assessment List Page by clicking Facilitate New Readiness Assessment next to the megaphone icon.



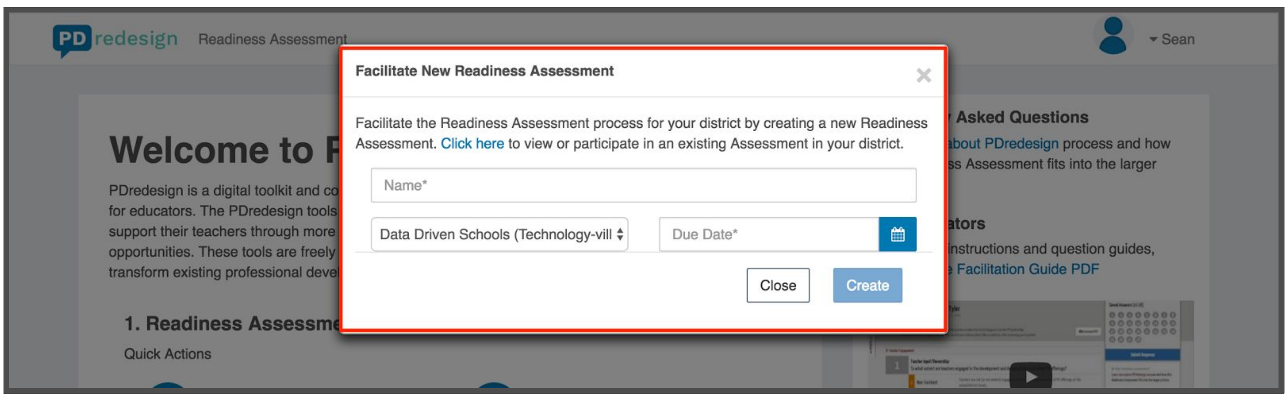
From pdredesign.org.



From the Assessment List.

2. Add Basic Details About Your Readiness Assessment.

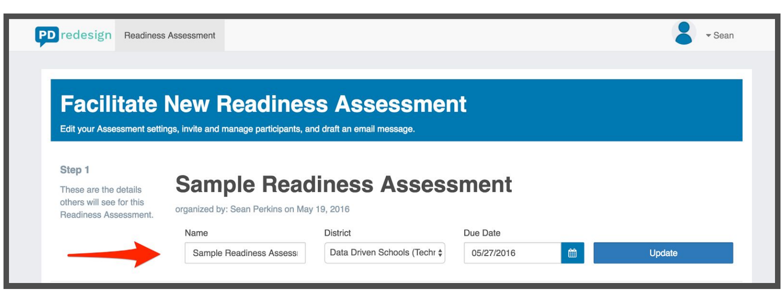
A pop-up will open asking you to name your new Assessment, add a due date, and choose your district. When you're done, click the blue Create button.



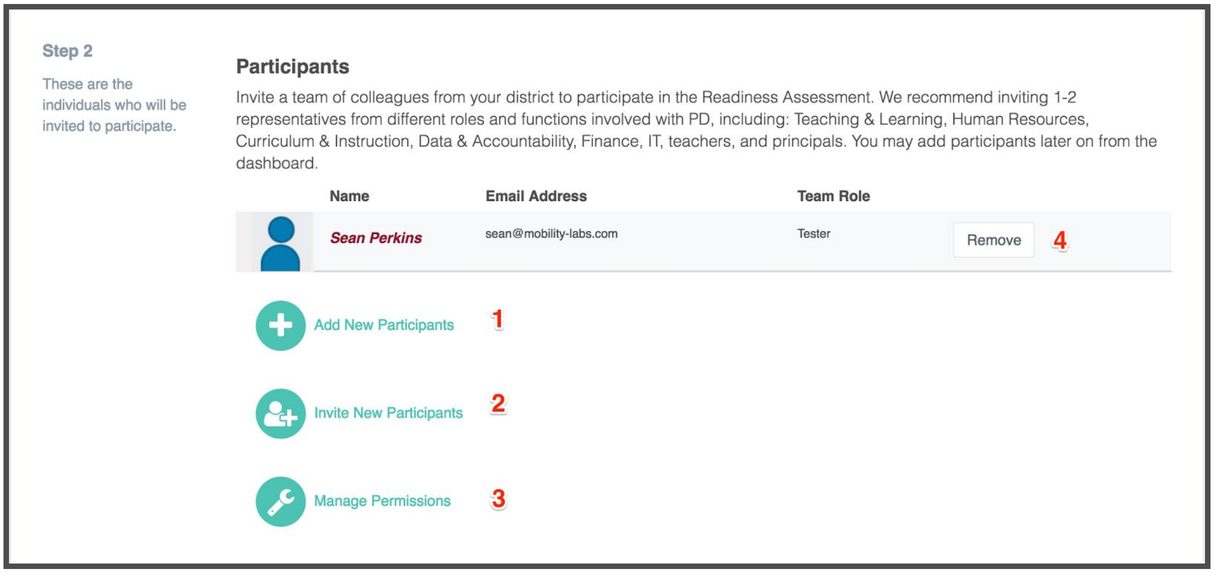
Clicking Create on the pop-up will take you to a new page where you will be able to edit details about your Assessment, invite participants, and add Learning Questions.

3. Add Additional Information and Invite Participants

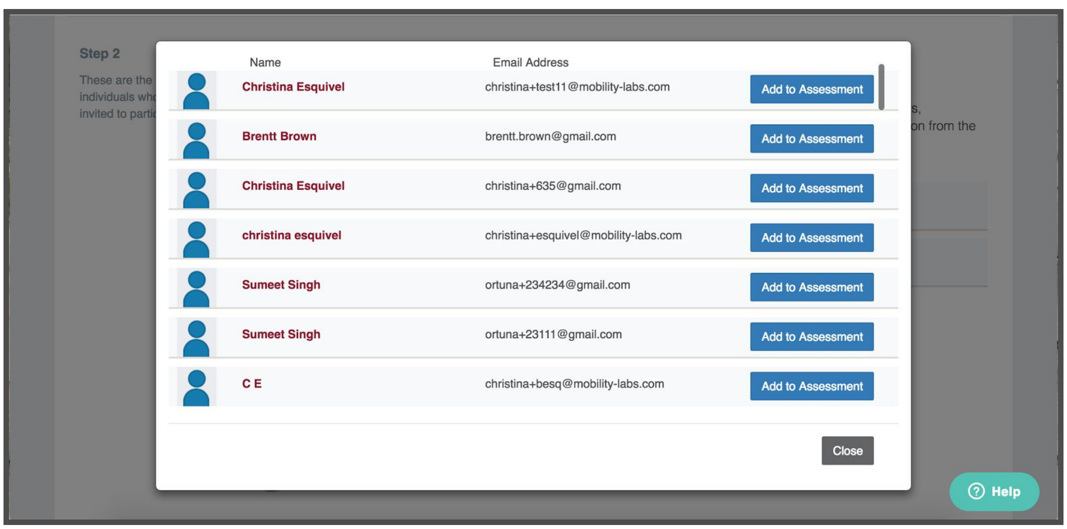
In the first section, you can make changes to the information you just entered.



In the second section, you can invite others to participate in your Readiness Assessment.

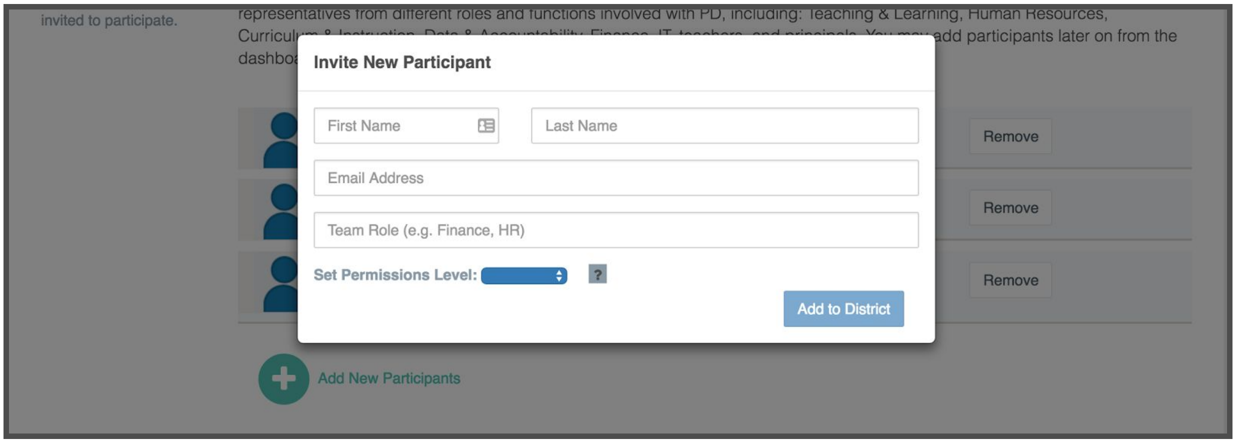


Start by clicking Add New Participants (next to the 1 in the image above). This opens a pop-up that lists existing PDredesign users from your district.



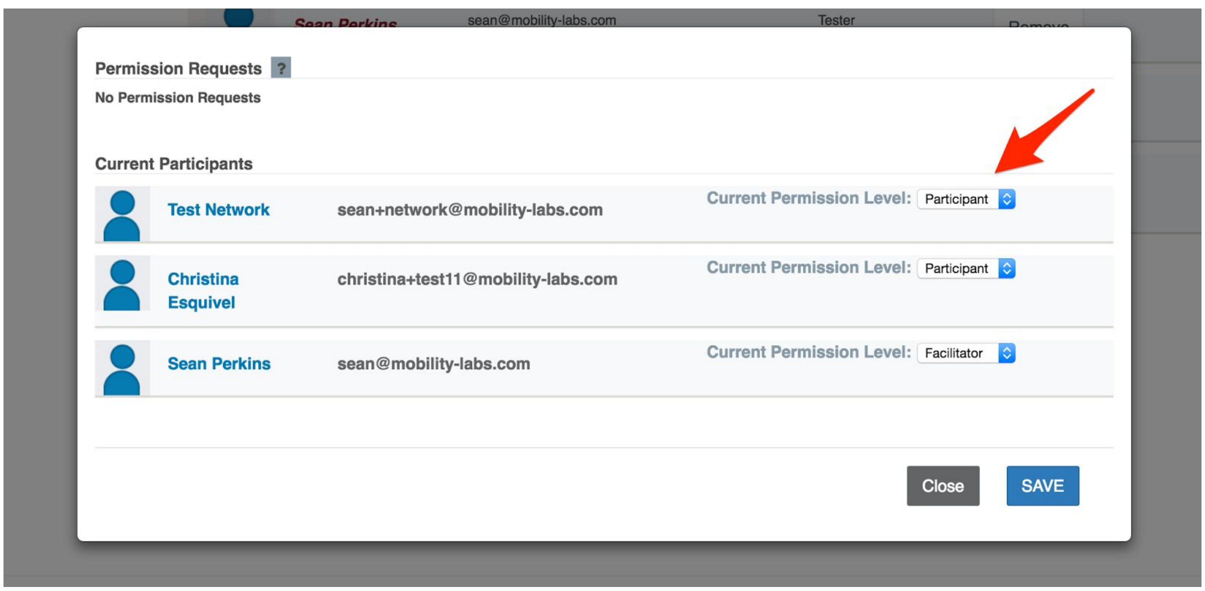
Click the blue Add to Assessment button to add a participant. Once a participant is added, they appear in the participant list.

If you do not see someone you'd like to add in the list of existing participants, close the pop-up and click Invite New Participants (#2 in the Step 2 image). This opens a pop-up where you can add a new participant to your Readiness Assessment by entering their name, e-mail address, team role, and permissions level (participant or facilitator).



Click Add to District when you're done.

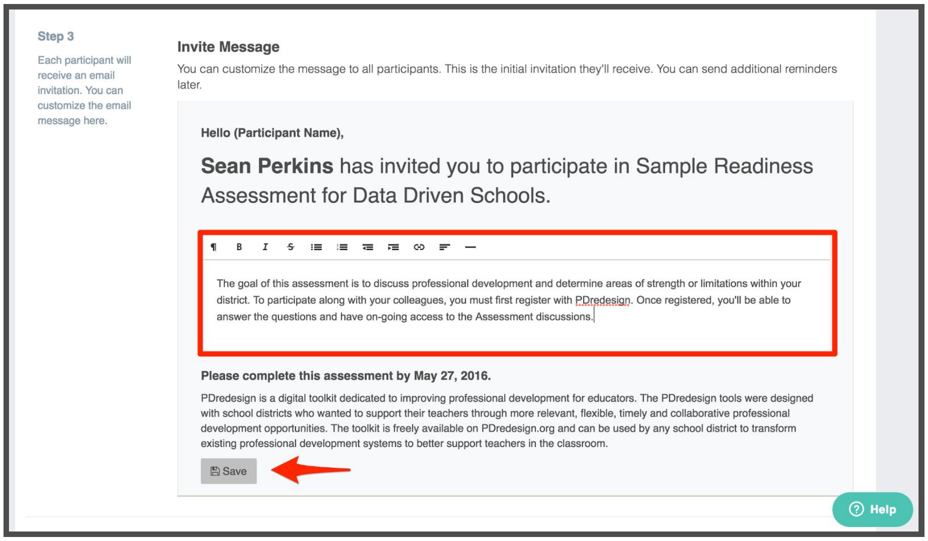
To change a user's permissions level, click Manage Permissions (#3 in the Step 2 image). This opens a pop-up where you can manage access requests and manage participant permissions.



To change a user's status from participant to facilitator or vice versa, click the blue dropdown and choose the desired status. Click Save when you're done.

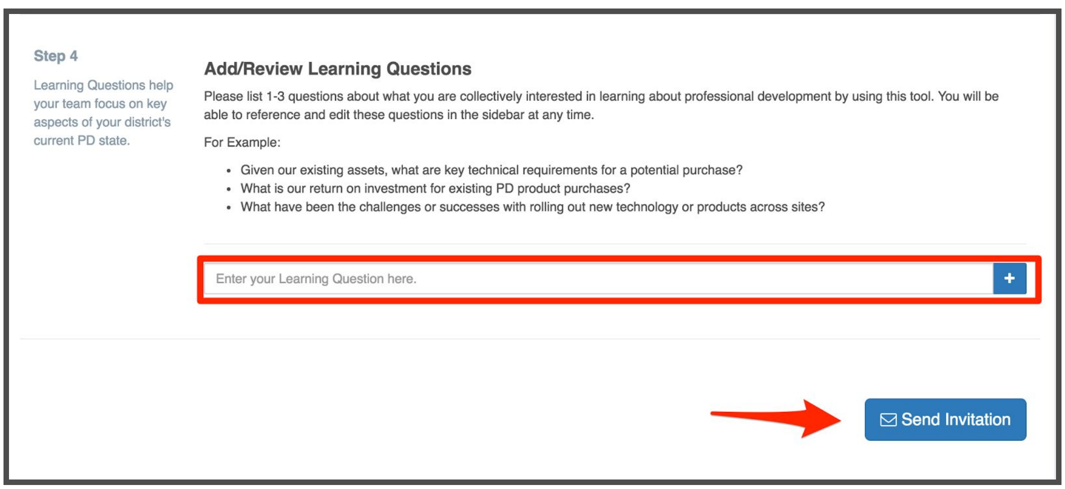
To remove someone from your Readiness Assessment, click the Remove button in your participant list (#4 in the Step 2 image).

In the third section, you can draft a custom message to email to your invitees. Your name and the due date will be added automatically, and you can customize other text by typing in the text box.



You can save your message to come back to later. Your message will not be sent until you click the Send Invitation button at the very bottom of the page.

Finally, add your Learning Questions, which help your team better understand what you hope to learn by completing the Readiness Assessment. You can edit, add, or delete Learning Questions throughout the Readiness Assessment.



When you have finished this section, you can click Send Invitation to complete the creation of this Readiness Assessment. If you'd like to finish it later, exit out of this page and your information will be saved automatically.

Once you've completed this final step, your Readiness Assessment is set up.

Readiness Assessment Use Cases

The Readiness Assessment is best used at the beginning of a professional development (PD) redesign process, but is also a valuable tool for reflecting on current PD offerings. Use of the Readiness Assessment is not limited to the following cases.

Primary Use Case: Organizing step in creating a shared understanding of the current PDredesign challenges and innovation objectives

Background: A district or CMO has established a core PDredesign cross-functional team to serve as the redesign leadership. Key elements of the PDredesign innovation have been defined, but specific team activities and implementation steps have not been fully determined.

1. Each team member independently reviews and answers each of the 30 questions based on their experience and understanding within the district or CMO.
2. All participants meet to discuss their perspectives in the consensus meeting. Moving through each question, the responses are discussed and differing perspectives are shared. Then, the group reevaluates the responses to align on a consensus score for each question. These outcomes are captured in the tool for reference.
3. After generating the consensus scores and leveraging the scoring rubric, create the summary report to highlight key strengths and gaps observed.
4. From the assessment report, members of the core PDredesign team determine how to incorporate the learnings into actionable next steps and prioritize areas of focus.

Potential variations to the above use case:

➢ For districts that are distributed in terms of program design, or trying to get a clear perspective of individual stakeholder groups, this tool can be used to understand such perspectives to define PDredesign innovation plans.

  In this use case, the Readiness Assessment can be used to survey the specific stakeholders. For example, a group of teachers could answer the questions as well as a group of home/central office personnel. Note that this is not a substitute for teacher-centered engagement and design, but instead a method to increase the inputs/data about the current state for those involved in the cross-team conversation.

Key to making this approach successful is to ensure appropriate resources and time are allocated to effectively drive this process.

- Instead of using the tool at the beginning of the redesign process, a school district or CMO could use the assessment periodically throughout the redesign implementation phase. This method allows for clear understanding of the progress being made along the way. One consideration to be managed with this usage is that it requires continued engagement across all key stakeholders and tight focus on the key issues that enable the PDredesign program transformation. These interim check-ins identify new issues and the group will need to determine whether the new issues are core or incidental to the PDredesign effort.

Scoring in the Readiness Assessment

The Readiness Assessment contains 30 questions along with guiding questions to focus the discussion topics. Some of the questions are intentionally ambiguous to allow the team to align on their own internal definitions and working norms.

The building blocks and enabling conditions that facilitate empowered and effective teachers are built into the Readiness Assessment as key program elements to be addressed in designing or innovating professional development programs. For each building block and enabling condition, several key questions are posed to get a sense of the current level of capability maturity.

Each question includes its own scoring rubric to help you choose the best score. There are four capability levels described for each question:

- *1 - Non-existent*: Fairly low level of capability maturity, in that limited capabilities exist or those that are present do not exist in any pervasive, repeatable manner.
- *2 - Initial*: Increased level of capability over “non-existent,” generally characterized by inconsistent execution and limited repeatable processes.
- *3 - Defined and Managed*: Moderately high level of capability maturity, with consistent execution and repeatable processes.
- *4 - Optimizing*: Highest level of process maturity, characterized by high level of execution, process standardization, and continuous monitoring and feedback to achieve

the desired results, that are formalized and part of the way the district "does business" on a consistent basis – ingrained in their policies and practices, and continue even through leadership changes.

Questions in the Readiness Assessment

Note: The use of the word "district" includes CMOs. CMO personnel engaging with this tool should read "district" as "CMO/Central office."

Teacher Engagement (Questions 1 - 4)

Teacher Input/Ownership

Question 1: To what extent are teachers involved in the development and design of district/school PD offerings?

Things to Consider:

- Identify the model for teacher engagement in the PD design and program execution – whether for program offerings/design, as feedback source to on-going program updates, or both.
- Consider both district/network-wide PD as well as individual school site PD.
- Who are the key players currently responsible for designing PD?
- Think about whether or not teacher feedback is incorporated into the design and development of PD.
- Evidence should include specific examples of how teachers do or do not participate in the development of PD offerings

Sample Score and Evidence:

- 3 – Defined and Managed: "Although there are no formal roles/rules for teacher participation in PF, we have teachers in every school who consistently create, update, or deliver PD to other teachers."

Empowered Teachers

Question 2: To what extent do teachers choose their own PD?

Things to Consider:

- Determine level of teacher accountability and choice in PD offerings and personalization.

- Outside of the mandated PD offerings, are teachers given the option to choose from a selection of PD offerings?
- Consider both district/network wide PD as well as individual school site PD.
- Is there support for teachers to attend PD outside of the district offerings?

Sample Score and Evidence:

- 1 - Non-Existent: PD is determined for teachers primarily by their principals or by the district based on tenure, content area, district/school initiatives and is not at all based on identified individual professional growth needs.

Collective/Team Development

Question 3: To what extent do teachers work together as a professional community and share responsibility for the group's high quality performance?

Things to Consider:

- What are the formal structures in place specifically designated for teacher collaboration, such as professional learning communities, coaching/mentors, etc.?
- What processes do we currently have in place to track how time is utilized during these formalized structures?
- How do teachers perceive the quality of the collaborative structures to be?

Sample Score and Evidence:

- 2 – Initial: "All teachers in our district are part of at least one formalized structure (ie. PLC or grade-level meeting), but the quality of work completed is highly variable."

Effective Teachers

Question 4: What percentage of your teachers are rated effective using multiple teacher effectiveness measures?

Things to Consider:

- Are similar measurements used across the district?
- When using multiple teacher effectiveness measures, how do you weigh each one in determining effectiveness?
- Are effective teachers spread evenly across the district or are they in clusters?
- Do teachers know and understand what each measure means?

Teacher Engagement Pro Tips:

- Think about your cross-functional team and the potential biases and viewpoints they each hold.
- Consider doing the assessment process with groups that are underrepresented in this team.
- This section typically takes longer than other sections in the assessment, so do not get discouraged.

PD Process (Questions 5 - 9)

Identify PD Needs

Question 5: Is there an evidence-based framework in place to identify individual PD needs and is it effective?

Things to Consider:

- Identify the level of data-driven capability to create PD offerings and personalize teacher PD selections based on needs.
- Consider both the teacher evaluation tool and any other methods you have in place for identifying teacher's professional goals. For example, annual review/teacher assignment discussions, teacher interest surveys, informal observations, student outcome/achievement analytics, etc.
- Think about whether or not the data generated from the framework is used to identify teacher's professional needs and drive future PD.
- Once the professional goals have been identified, do you follow up formally to ensure the available PD is aligned with his or her professional needs?

Personalized PD

Question 6: Do district/school PD offerings give teachers what they need?

Things to Consider:

- Identify the level of differentiation among PD offerings – personalization and relevancy to the teacher needs.
- Consider, are all teachers exposed to the same PD regardless of their identified needs?
- Is there a difference between individual school site PD and district/network wide PD?

Sample Score and Evidence:

- 3 – Defined and Managed: All of our teachers have growth/development goals defined each year. We are in the process of purchasing or developing PD content that addresses the majority of these identified PD needs. Currently, we struggle with offering PD for veteran teachers.

Access Multiple PD Models

Question 7: Is high quality PD delivered effectively through multiple delivery models?

Things to Consider:

- Identify the level of personalization and occasions for teachers to take advantage of PD offerings.
- Think about what types of PD are offered in your program (helpful to list out all current forms of PD being offered). Is there more than one method of delivery?
- This question is not asking if you take advantage or access all of the delivery models, just an inventory of what you have available. If it is unclear what is currently available, the Data & Tech Inventory might be a good step to complete to provide the needed information – whether as an input to the consensus discussion (if this is a known gap up front) or a follow-up.
- This question is a good opportunity for the group to clarify what they consider to be PD – coaching, common planning time, set-aside PD time only (e.g. "Wednesday PD"), etc.

Sample Score and Evidence:

- 2 – Initial: All teachers have access to in-person PD lectures, and all teachers work with instructional coaches throughout the school year. Many of our teachers participate in online learning they find on their own, but the district does not provide any digital content."

Use Continuous Feedback

Question 8: Do teachers receive continuous performance feedback and does it inform their PD paths?

Things to Consider:

- Are teachers taking advantage of PD based on on-going feedback and observations to improve teacher performance or is feedback separate from the PD planning/delivery process?

- Outside of the formal evaluations each year, how much feedback do your teachers receive?
- What processes are in place to follow-up with a teacher's engagement in PD and ensure he or she is making the recommended adjustments?
- Is the process consistent for new teachers and more seasoned teachers?

Sample Score and Evidence:

- 3 – Defined and Managed: Our teachers receive 3 formal evaluations each year as well as weekly instructional coaching sessions that serve as informal evaluations. Our instructional coaches help identify areas for growth for every teacher and provide support for their development."

Use Student Feedback

Question 9: To what extent does feedback from students about their educational experience inform teacher PD?

Things to Consider:

- How and how often is student feedback collected?
- Is feedback collected from a sample of students or from all students?
- Does this data inform the content or quantity of teacher professional development?

PD Process Pro Tips:

- A common question that is often raised during this section is whether a participant should answer based on their site experience or the district as a whole. This conversation is valuable. PDredesign recommends using the site experience as bright spots and answering this question from a network/district perspective.
- As a next step, think about what you want this process to look in your district as a future state. For example, what data would you need? What systems support personalized PD?

Leadership Capacity (Questions 10 - 14)

Vision

Question 10: Do leaders have an innovative vision for dramatically accelerating teacher and student success?

Things to Consider:

- How does PD fit within the broader strategy of leadership within the districts?
- Does the PD offered empower teachers through improved practice?
- “Vision” can be interpreted in a lot of ways and may be a source of contention with the cross-team in the room. The language is intentionally ambiguous to prompt a conversation about a difficult topic.

Sample Score and Evidence:

- 2 – Initial: “We’ve had a lot of different exciting initiatives roll though our district over the past 10 years. Although each one in itself seemed like a good idea, nothing ever seems connected, and now, our staff and teachers are burned out on all the improvement places. There is a district vision, but not all the initiatives underway are aligned.”

Instructional Leadership

Question 11: To what extent to do district, school, and teacher leaders focus on instruction?

Things to Consider:

- What is the role and involvement of teacher and district leaders of supporting improved teacher practice?
- Consider whether improved instruction is prioritized in terms of leaders' time spent (e.g. meeting agendas) and how your school/district culture is set up to support improved instruction.
- Is the visibility of leaders in the classroom consistent across school sites?

Principal Input/Ownership

Question 12: To what extent are principals involved in the development and design of district/school PD offerings?

Things to Consider:

- What is the role of principals in determining what PD is offered to teachers at the school and district levels?
- How much time does the principal spend on PD-related work?
- With whom do principals collaborate to bring quality professional development to teachers at the school and district levels?

Change Management

Question 13: Does our organization have internal capacity to manage major change initiatives?

Things to Consider:

- Based on prior initiatives, what is the district's capability maturity for driving whole system redesign initiatives?
- What standard processes do you have in place for managing and leading change?
- Consider the level of turnover of leadership positions in central office as a measure of strategic continuity.
- Think about specific descriptions of recently undertaken change initiatives, how they were managed, and whether or not they had sustained success.

Communication

Question 14: Are major district initiatives clearly communicated and broadly understood?

Things to Consider:

- What is the district's capability in building support and executing strategy/leadership through communications?
- Think about whether or not all stakeholders receive the same information. Does it depend on the leader?
- How do you measure the extent to which stakeholders buy into initiatives?

Sample Score and Evidence:

- 2 – Initial: "The central office conducts monthly information and training sessions with all principals in the district. Any new initiatives are presented and discussed during those meetings. Some principals are really good about spreading the information throughout their schools, but other principals are not. Some teachers are taken off guard when a new program begins."

Leadership Capacity Pro Tips:

- As a next step, collect documentation around each one of these questions. For example, email drafts or process flow charts. Look for documents that support your score and identify where there is limited capability and room for improvement.
- Consider obtaining and using research and/or books to help with change management and leadership.

Resource Optimization (Questions 15 - 18)

PD Amount

Question 15: Is the budget sufficient for delivering high quality individualized PD?

Things to Consider:

- Does the budgeting and planning process allow for the types of spending (personnel, local customization, external vs. internal content, etc.) that is required for the current and future design of PD programs?
- Do you know how your budget is allocated specifically for PD and what percentage that is of the total district operating budget?
- Do principals and teachers feel there is enough budget allocated to PD?
- How transparent is the budgeting process, and do teachers and principals understand how their annual PD budgets are determined?

PD Financial Management

Question 16: Do the budget and financial management systems generate accurate and timely information for PD planning/decision support needs?

Things to Consider:

- Identify the level of financial support of PD – and key spending categories – to determine whether funding will need to be reevaluated for planned PD changes.
- Can you retrieve information about PD spending from one centralized place?
- Evidence should include description of what data system is used for financial management, the process used in collecting information about budget and actual spending on PD, and an assessment of how well integrated PD budgeting and planning is with the district spending as a whole.

Resource Allocation System

Question 17: Are resource allocation decisions anchored to fiscal, design, and instructional impacts?

Things to Consider:

- How does the district support schools in allocating resources?
- How do the district and schools work together to ensure resources are adequate and impactful?
- How are decisions related to resource allocation made?

PD Resource Utilization

Question 18: Do schools use time, staff, and money efficiently to optimize conditions for teaching and learning?

Things to Consider:

- Identify any potential limitations in teacher schedules to teacher professional development objectives.
- Consider time embedded into the school day as well as designated PD days during the summer/before school is in session.
- Is teacher prep time regularly taken up?

Supportive Policies (Questions 19 - 20)

Common Core State Standards

Question 19: What is the current level of Common Core State Standard adoption and PD linkage in our organization?

Things to Consider:

- Identify the level of program integration and support with CCSS initiatives – curriculum and professional development alignment.

Sample Score and Evidence:

- 2 – Initial: We are in the process of selecting a vendor to provide CCSS-aligned PD content. We plan to integrate this new content in our PD training within the next 2 months.

Policy Support

Question 20: To what extent do state, district and/or union policies or other rules and regulations support or prohibit PD implementation?

Things to Consider:

- Identify any potential synergies or gaps in support for professional development with external parties or regulations.
- Consider union time restrictions on PD, district/state policies about master schedules, budget, or other policy items that could impact a PD change initiative.
- Also consider how internal policies such a procurement permissions, conference allocation permissions, and security policies impact innovation in PD redesign.

Resource Optimization Pro Tips:

- To get a full picture of each of these elements of resource optimization, consider investing in a full scale audit (e.g. finance audit, time/master schedule audit) potentially using an outside consulting firm that specializes in these types of audits.

Delivery Infrastructure Rubric (Questions 21 - 23)

Ease of Access

Question 21: How easily can staff members access PD content including digital and offline offerings?

Things to Consider:

- In support of the offering modes, identify the level of access to digital content/information in light of PD program design objectives.
- Do teachers and other staff complain about access to PD?
- Is access the same for all users and is there a single sign-on?
- Is there adequate training on how to access digital PD content?
- If in-person PD choices are offered, do teachers understand how to choose/access the various offerings?

PD Digital Platform Capability

Question 22: How robust is your current technology platform to deliver PD content to staff members?

Things to Consider:

- What is the current level of capability in existing IT infrastructure and are new capabilities required (funding, timeline, etc.) to deliver the desired PD program elements?
- Evidence should include the name of the PD delivery platform and how teachers currently use it.
- Is the platform reliable and functional (including speed, content, etc.) in delivering the needed capabilities?

Sample Score and Evidence:

- 3 – Defined and Managed: "We have been using True North Logic to manage our teacher evaluation data and process for the past 2 years and have recently implemented their

PD module. In the next year, we want our teachers to use the TNL portal as a one-stop-shop for evaluation, PD tracking and PD content delivery."

Network Availability

Question 23: Do staff members have sufficient access to computers and network infrastructure to access digital PD from their classrooms and from home?

Things to Consider:

- Is connectivity and network speed appropriate to allow needed access to digital tools, content and information?
- Evidence should include specific data on the number of schools with broadband internet access, laptop/teacher and laptop/student ratios, and percentage of teachers who access content from home and from work.

Delivery Infrastructure Pro Tips:

To dig more deeply into online PD platforms, consider completing the PDredesign Data & Tech Landscape, which collects an inventory of systems including digital PD platforms and current use and satisfaction with those tools.

Data Infrastructure (Questions 24 - 25)

Data Capture

Question 24: Is data (including student data, assessment data, teacher HR data, teacher-student link, PD consumption data) digitally captured?

Things to Consider:

Key Question: Determine what level of data-driven content is possible or needed for the PD redesign objectives.

- Example 1 – non-existent: "We collect student data in Powerschool, teacher data in Lawson, and assessment data in Schoolnet. We do not currently track data about PD. We have to log in to each of these systems individually to look at the data."
- Is it clear what data is captured? If not, it might be useful to inventory the key data captured (in collaboration with IT) to educate the full PDredesign team and to more accurately evaluate this aspect either before or after the readiness assessment process.

Data Access

Question 25: To what extent can staff members access meaningful analysis of data (including dashboards and reports) to inform PD?

Things to Consider:

- Is information that helps identify teacher needs, student performance that drives teacher professional development needs, or other PD program needs easily obtainable?
- Consider emphasis on whether or not teachers are using data to make informed decisions around PD.
- Similar to the data captured, is it clear what data is accessible and to whom? Often there is more capability than is known due to historical lack of adoption or limited training to sustain knowledge in this space. If it is unclear what the current capability is, this might warrant further analysis.

Data Infrastructure Pro Tips:

- To clarify all the data elements and how there are accessed, consider completing the PD Data & Tech Inventory, which highlights current data capabilities.

High Quality Content and Tools (Questions 26 - 30)

CCSS Alignment

Question 26: To what extent are existing curriculum, instruction and assessment systems aligned to CCSS?

Things to Consider:

- Determine the level of program cohesion and PD integration with curriculum (for relevant PD offerings).
- Think through whether *all* or only *some* of the curriculum, assessments and instruction are aligned.

CCSS Implementation

Question 27: To what extent are teachers implementing instruction aligned to CCSS?

Things to Consider:

- Determines the current level of adoption of CCSS – how will this impact the proposed whole system redesign effort for professional development? Will the timing of this PD redesign help or potentially "compete" for resources/focus?
- Are some content teachers further along in the adoption process than others?

Quality PD Content Availability

Question 28: Is the quantity, quality, and variety of available PD content adequate?

Things to Consider:

- Is information that helps identify teacher needs, student performance that drives teacher professional development needs or other PD program needs easily obtainable, or is that an area of need as part of the redesign effort?
- Determine your organization's definition of high-quality PD. If this has not yet been completed, this might be a good next step.
- Is the PD content relevant to a teacher's identified needs? See earlier section as to how teacher needs are identified, as well as any confidence in the knowledge base of the team as to the teacher perspective on this question (along with district, principal, PDredesign leads, etc.).
- What formal processes do you have in place to measure quality of PD offerings (assessment, impact to student outcomes, teacher PD satisfaction, etc.)?

PD Content Consumption

Question 29: To what extent is available PD content utilized?

Things to Consider:

- Are current PD offerings used – and if not, what is the barrier to their use? If used, what is the reason that they are? If unknown, consider doing a follow-up to learn more before finalizing the Readiness Assessment.
- Consider what systems you have in place to track teacher participation of available PD.
- Is there support/funding to attend PD sessions outside of the school offerings?
- This question is about teachers accessing PD content. The next question is about whether organizations track whether/how teachers implement what they learned from PD they have taken.

PD Content Efficacy

Question 30: How does our organization use feedback and metrics to create accountability for PD effectiveness and improve PD activities and investments?

Things to Consider:

- Determine the level of data-driven processes to understand the level of usage of current offerings and rationale. If immature, incorporate redesign efforts to improve.
- Do you currently have a system in place to track teacher satisfaction of PD?
- How you would determine how PD has influenced teacher's practice?

Sample Score and Evidence:

- 3 – Defined and Managed:We collect a lot of data about PD needs and consumption using our Teachscape system. This integrates data from multiple sources and shows how teachers are using (or not using) PD content that we are providing. We need to define a process for linking usage of PD back to teacher performance so that we can subsequently update our PD offerings.

High Quality Content and Tools Pro Tips:

- Evaluate the effectiveness of any exit surveys distributed after PD offerings. If there are currently no systems in place to gauge PD effectiveness, consider using exit surveys.
- To get an overall understanding of teacher satisfaction around PD, consider using the End User Survey.

Sample Readiness Assessment Agenda

Below is a sample agenda for a facilitated Readiness Assessment session. Depending on the number of people present for the session, working through the tool typically takes 5-6 hours. The expectation is that all participants have filled out the tool and provided pieces of evidence for their score prior to the start of the session. Additional participants (e.g. finance representative) have been recommended to attend certain sections of the session because their expertise has proven very valuable for that particular topic. It is highly recommended to include several teachers and teacher leaders on the PDredesign team and to include them throughout the entire session.

<table>
<tr><td colspan="3">Objective:
The objective of this session is to discuss the questions in the PDredesign Readiness Assessment tool for District X. Upon completion, District X will have a thorough understanding on the current state of their Professional Development (PD) system and a basis for developing high level priorities for their PDredesign initiative.</td></tr>
<tr><td>Location:</td><td>Date:</td><td>Time:</td></tr>
<tr><td colspan="3">Participants:</td></tr>
</table>

Hour	Time	Agenda Topics	Participants
9:00 AM	15 min	Introductions	Core PDredesign Team
9:15 AM	15 min	Session Overview	Core PDredesign Team
9:30 AM	60 min	Readiness Assessment Block 1 (7 questions total) » Teacher Engagement (3 questions) » PD Process (4 questions)	Core PDredesign Team
10:30 AM	30 min	Readiness Assessment Block 2 (6 questions total) » Leadership Capacity (4 questions) » Supportive Policies (2 questions)	Core PDredesign Team HR representative
11:00 AM	30 min	Readiness Assessment Block 3 (5 questions total) » Resource Optimization (5 questions)	Core PDredesign Team Finance representative
11:30 AM	60 min	Readiness Assessment Block 4 (10 questions total) » Delivery Infrastructure (3 questions)	Core PDredesign Team IT representative

		» Data Infrastructure (2 questions) » High Quality Content and Tools (5 questions)	
12:30 PM	30 min	Lunch	
1:00 PM	30 min	Finalize Assessment » Address open questions » Finalize any incomplete section and review the output of the report » Gather tool feedback	Core PDredesign Team
1:30 PM	30 min	Next Steps » Identify immediate and high level priorities » Identify where more information is needed	Core PDredesign Team
2:00 PM		Meeting Close	

Readiness Assessment Report

The report provides additional insight into the results and presents a summary view of all the questions within each PD area to drive high-level takeaways and next steps. The diagnostic minimum score is a relative score to help contrast the consensus score and highlight strengths and weaknesses. The items in this list can be reprioritized depending on district/CMO needs.

Sharing the Report:

This report can be shared with other stakeholders through the Share by Link feature or by downloading the data as a .csv and sharing this data via e-mail. Participants and facilitators will also be able to view or share this report.

Questions to Consider Moving Forward:

- What are three to four critical questions you want to be able to answer about the PD experiences of your teachers and the types of PD that are consumed throughout your longer-term PDredesign implementation plan? What data will you need to answer these questions?

- How will your district engage a cohort of teachers throughout the PDredesign implementation plan? What will be the role of teachers and teacher leaders in your PDredesign theory of action?
- What additional data sources/opportunities can your district leverage in the next few months to get a comprehensive picture of the current state to inform the design of the future state?

Readiness Assessment Facilitation Best Practices

- Identify an objective facilitator to document and guide the cross-team conversation.
  - Successful facilitators have included both internal personnel and external consultants. Key skills include understanding system redesign, ideally with some content knowledge of school district function and teacher professional development. Facilitators may be program leaders, PDredesign advisors, and others who can ensure that all voices are heard without a vested interest in the outcome. Also, the facilitator enables all key PDredesign leaders to participate fully in the process.
- It is important to drive for clarity by deciding a score for each of the 30 questions.
- The facilitator should document key discussion points, and support the group in reaching a “consensus” score for each question.
  - This guide includes use case examples for successful outcomes to help a facilitator anticipate questions that may arise while working through the assessment.
  - Some of the questions are intentionally ambiguous so that the cross-team can decide for itself how to define terms and measures of success.
  - The goal is to focus more on the content being discussed rather than on the score of each question.
- Remember that the scores are subjective and are meant to align the team towards clear PDredesign innovation and implementation.

Data & Tech Inventory

Data & Tech Inventory Overview

The PDredesign Data & Tech Inventory is a free tool for school districts and CMOs to organize their data and technology systems that support professional learning and is the first step in completing at Data & Tech Landscape. A small team of participants from across departments collaboratively add information about their current data systems and technology products to build an inventory. The team may include a PD lead, tech lead, finance lead, and others.

The Data & Tech Inventory may be used to:

- Share knowledge across departments
- Gain a high-level insight into existing tools and capacities
- Define technical requirements for new technology purchases

The tool was intentionally built as a group record so the inventory is as accurate as possible. Below are the steps needed to complete the Data and Tech Inventory.

1. The facilitator will invite participants and other facilitators and set a due date.
2. Participants will review existing entries and add new ones to the best of their ability.
3. Once the inventory is satisfactory, any participant or facilitator can then create a Data & Tech Analysis from that Data & Tech Inventory, download the data to .csv, or share the Inventory results.

Data & Tech Inventory Setup

To learn more about how to create and set up a Data & Tech Inventory, see the section on setting up a Readiness Assessment on pages 2 -6 in this document. The setup process is the same except that you click Facilitate New Data & Tech Inventory on the homepage or on your Inventory List Page.

Data & Tech Inventory Use Cases

The Data & Tech Inventory is most commonly used at the beginning of a school year or at the end of the school year. When used at the beginning of the school year, the Inventory can help a district understand what resources are already available. When used at the end of the school year, the Inventory provides valuable insight not only into what resources are available, but also how widely they are used and in what capacity.

The Data & Tech Inventory is most commonly used by districts to better understand the data and technology available across the district, but can also be used at a school level to better understand how data and technology differ from school to school across the district.

Data & Tech Inventory Facilitator Best Practices

- Invite a team with clear insight into the data sets and tech products in use in your district.
- Remind participants to review existing entries and add additional information they have if an entry is incomplete.
- Designate different points in the school year that team members review your Data & Tech Inventory to ensure its listings are up to date.

Data & Tech Analysis

Data & Tech Analysis Overview

The PDredesign Data & Tech Analysis makes it easy to see how effectively technology is aligned to district needs and goals. It picks up where the Inventory leaves off and brings together central office staff from across departments for an in-person meeting (or meetings) to discuss how current data systems, technology infrastructure, and product purchases documented in the Inventory are supporting teachers across several key areas. Once the Data & Tech Analysis is complete, a district can prioritize goals and view additional resources created by EdSurge to prepare to take next steps.

The Analysis may be used to:

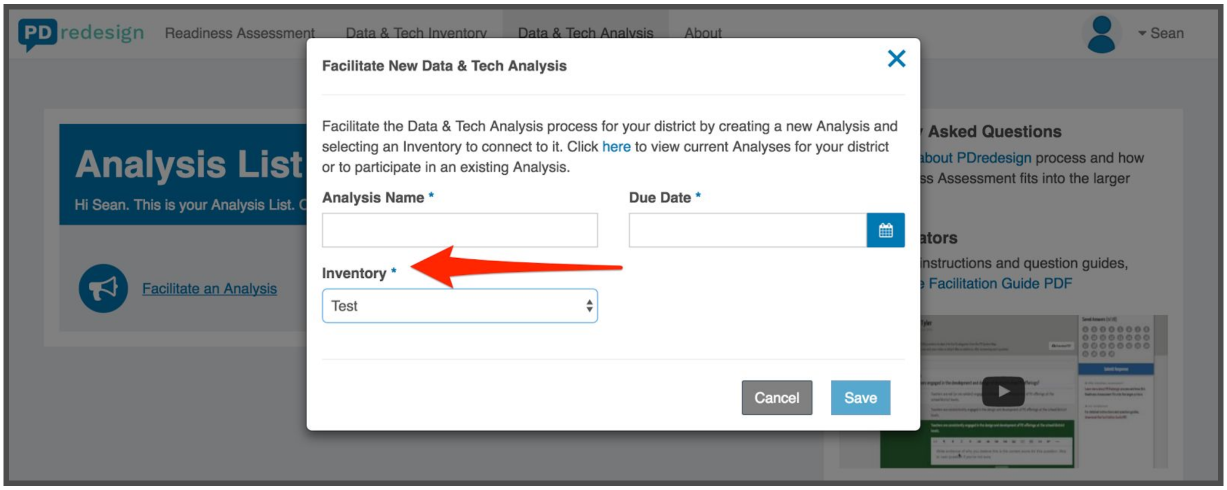
- Share knowledge and build consensus across departments
- Gain a high-level insight into existing tools and capacities
- Define technical requirements for new technology purchases
- Understand return on investment for PD purchases
- Surface challenges and successes in new technology implementation

The following steps are required to complete a Data & Tech Analysis:

1. A participant or facilitator creates a Data & Tech Analysis for a Data & Tech Inventory he/she was a part of and sets a meeting date.
2. Participants and facilitators from the Data & Tech Inventory are automatically added to the Data & Tech Analysis. Additional facilitators can be invited.
3. The participants and facilitators attend the meeting and bring any relevant data or notes with them. The facilitator guides the team in filling out each of the 11 categories.
4. The facilitator submits the team's responses and participants and facilitators can view, share, or download the report.

Data & Tech Analysis Setup

The setup process for the Data & Tech Analysis is similar to the Readiness Assessment setup process. First, click Facilitate New Data & Tech Analysis next to the megaphone icon on the homepage or on your Analysis List Page. After clicking that, you will see this pop-up:



In addition to giving your Analysis a name and due date, you will also need to connect the Analysis to an existing Data & Tech Inventory by selecting one from the list in the pop-up.

The rest of the setup follows the same process as that described in Step 3 of the Readiness Assessment Setup on pages 2 - 6.

Data & Tech Analysis Use Cases

The Data & Tech Analysis is most commonly used at the beginning or at the end of the school year. Use of the Analysis is not limited to the following cases.

Background: A district or CMO has completed a Data & Tech Inventory and is ready to move forward with the Data & Tech Analysis to complete the Data & Tech Landscape.

1. Each team member should review each of the 11 areas related to PD prior to the meeting and be prepared to provide insights based on their experience and understanding within the district or CMO.
2. All participants meet in person to discuss their perspectives. Moving through each category, the responses are discussed and differing perspectives are shared. Then, the group reevaluates the responses to align on a consensus score for each question and to

tag any products or data sets related to that category. The facilitator documents these outcomes in the tool for reference.

3. After all relevant categories have been assessed, the facilitator generates the summary report to highlight key strengths and gaps observed.
4. Based on the report, members of the core PDredesign team determine how to incorporate the learnings into actionable next steps and prioritize areas of focus. If a team is unsure of how to proceed, they can refer to the EdSurge resources available for each category in the report and determine what best fits their needs.

Potential variations to the above use case:

➢ For districts that are distributed in terms of program design, or trying to get a clear perspective of individual stakeholder groups, this tool can be used to understand such perspectives to define PDredesign innovation plans.

  In this use case, the Data & Tech Analysis can be used to better understand different stakeholder perspectives. For example, a group of teachers could answer the questions as well as a group of home/central office personnel. Note that this is not a substitute for teacher-centered engagement and design, but instead a method to increase the inputs/data about the current state for those involved in the cross-team conversation. Key to making this approach successful is to ensure appropriate resources and time are allocated to effectively drive this process.

➢ Instead of using the tool at the beginning of the redesign process, a school district or CMO could use the assessment periodically throughout the redesign implementation phase. This method allows for clear understanding of the progress being made. This usage requires continued engagement across all key stakeholders and tight focus on the key issues that enable the PDredesign program transformation. These interim check-ins identify new issues and the group will need to determine whether the new issues are core or incidental to the PDredesign effort.

Scoring in the Data & Tech Analysis

The Data & Tech Analysis contains 11 categories to focus the discussion topics. Each category is aligned to a key area of successful use of technology and data in supporting teacher professional development.

There are four capability levels described for each category:

- *1 - Non-existent*: Fairly low level of capability maturity, in that limited capabilities exist or those that are present do not exist in any pervasive, repeatable manner.
- *2 - Initial*: Increased level of capability over "non-existent," generally characterized by inconsistent execution and limited repeatable processes.
- *3 - Defined and Managed*: Moderately high level of capability maturity, with consistent execution and repeatable processes.
- *4 - Optimizing*: Highest level of process maturity, characterized by high level of execution, process standardization, and continuous monitoring and feedback to achieve the desired results, that are formalized and part of the way the district "does business" on a consistent basis – ingrained in their policies and practices, and continue even through leadership changes.

In addition to documenting a score and evidence, the facilitator should also add products and data systems that support professional learning in each category to ensure the Analysis produces a complete picture of the district's current state.

Categories in the Data & Tech Analysis

Note: The use of the word "district" includes CMOs. CMO personnel engaging with this tool should read "district" as "CMO/Central office."

Category 1: Establish a Shared Vision for PD

PD programs are developed based on a shared vision for teaching and learning.

Recommendations:

- Identify student, teacher, and community needs for teaching & learning from multiple sources (surveys, focus groups, assessment data, observation).
- Discuss results of the most recent needs analysis.

- Gather feedback on vision for professional development and learning from students, teachers, leaders, and community members. Where does it differ from your district's vision and why?
- How does your district communicate a shared PD vision to the district community?

Category 2: Identify PD Needs

Teacher PD needs are identified based on a clear, common framework for effectiveness.

Recommendations:

- Select and store a PD Needs Assessment Framework, which clearly states the skills that the district believes are essential for teacher effectiveness; support processes, methods or algorithms for determining need based on the PD Needs Assessment Framework.
- Collect and integrate performance information from multiple data sources aligned to PD Needs Assessment Framework (e.g. observation, survey, assessment data), and from student performance data sources.
- Analyze, prioritize, and store individual teacher PD needs data based on integrated performance information and PD Needs Assessment Framework; view and store PD Needs Assessment reports.
- Make PD needs data available to all relevant actors (teachers, coaches, principals).
- Enable grouping of individuals based on PD needs assessment.

Category 3: Personalize PD Plan

Teacher PD plans are personalized in terms of prioritization, content, and timing to meet identified PD needs.

Recommendations:

- Access PD Needs Assessment Reports and/or data.
- Create and track individual learning plans for teachers with development goals based on PD Needs Assessment framework.
- Identify the area of practice needing improvement based on data, coaching feedback, self-identified interest, or other means.
- Prioritize scope and sequence of PD activities to support individual and group goals.
- Search for PD resources and/or activities that will address identified PD need/PD goals aligned to PD Needs Assessment framework (Group or Individual).
- Select and document resources and activities to address PD Needs Assessment.

- Schedule time to engage with PD resources; Register to engage with PD resources identified in PD Action Plan.

Category 4: Access Multi-Modal PD Models

Teachers easily access multiple delivery modes to meet identified PD needs, including: coaching, workshops, lectures, videos, peer collaboration, live, online, 1:1, small group, whole group.

Recommendations:

- Deliver in-person or online PD to teachers based on identified needs, including coaching, workshops, lectures, videos, or internal or external collaboration. Use multiple delivery modes (live or online, 1:1, small group, whole group).
- Upload and store professional or user-generated digital PD content; store non-digital resource descriptions and registration/engagement instructions (group or individual).
- Tag PD content with standardized search tags aligned to the PD Needs Assessment framework to make them easily discoverable.
- Provide ability to share resources among teachers, schools, and networks.

Category 5: Develop Teaching Practice

Teachers engage in PD that helps them develop their practice by setting goals, collaborating with coaches and peers, and applying what they learn in the classroom.

Recommendations:

- Match teachers to coaches, or coaching resources, selection/assignment of instructional mentors.
- Schedule and participate in post-observation conferences and identify & track areas of growth.
- Collaborate with colleagues, share resources, work together on joint goals.
- Search for or otherwise discover resources to improve practice in specifically-defined areas of need (e.g. as determined through goal-setting process or from coaching feedback).
- Incorporate PD learning and progress into the classroom, adjusting usage as needed to fit circumstances.
- Understand and review Learning Plan, steps taken to improve, and potential opportunities for future development.

Category 6: Build Collective Capacity

Teachers have opportunities to lead or engage in peer learning such as mentoring, coaching, PLCs or other networks.

Recommendations:

- Develop skilled teachers to support implementation of school-based PD, provide mentoring and instructional coaching, run data teams and PLCs.
- Enable collaborative learning among colleagues either within a school, or as part of an extended network of professionals; simultaneously engaging teachers, principals, and administrators.
- Contact professionals both within school/district network and outside it to generate ideas for both classroom practice and professional development.

Category 7: Build School Community

Teachers build relationships with students, colleagues, and families for support and informal collaboration.

Recommendations:

- Student-teacher collaboration and conferencing, class collaboration.
- Share information about school activities and goals, teacher growth data, and pedagogical leadership.
- Engage with parents about school activities, notifications, grades, homework assignments, volunteer needs.

Category 8: Manage Talent

Teachers are hired, trained, and assigned based on school priorities and receive ongoing compensation and development.

Recommendations:

- Manage and track candidates and applicants, store profiles, capture interview feedback; extend and accept offers, schedule start dates; HR and benefits enrollment.
- Provide orientation, socialization, mentoring, and guidance to new teachers, mentor selection and assignment.
- Enable staffing process, staff teachers in schools; align staffing with principal needs, teacher qualifications and preferences; define classes and assign students to teacher.
- Compensation management; manage salary schedules and incentive compensation.
- Track and manage certification requirements and teacher certifications.

Category 9: Observe and Evaluate Teachers

Teachers receive actionable instructional coaching and feedback on their performance.

Recommendations:

- Schedule in-person or remote teacher observations with peer observers, coaches, or principals.
- Collect and manage teacher feedback with observers.
- Evaluate teachers and track teacher performance.
- Manage teacher evaluations, track and manage teacher performance.

Category 10: Evaluate PD Resources

PD resources are continuously evaluated based on teacher satisfaction, usage data, and impact on effectiveness.

Recommendations:

- Record use of PD content (group or individual).
- Document user's opinion of quality of PD resource (all modes, live or online).
- Aggregate and user opinion/feedback on PD content.
- Measure and document progress against PD Plan.
- Evaluate PD resource use alongside PD Progress report to measure PD resource effectiveness.
- Purchase PD resources or provide tools to create PD resources, including digital content, in-person engagement, and both digital and in-person collaboration activities.
- Update visibility and/or availability of PD resource based on aggregate opinion/feedback and effectiveness measurement.

Category 11: Improve PD Program

PD programs are evaluated for effectiveness and fidelity of implementation, with support for improvements as needed.

Recommendations:

- Capture and monitor measures of overall program effectiveness; capture measurements of implementation fidelity at school and teacher level.
- Capture program evaluation metrics and facilitate improvement planning.
- Refine PD vision on a regular basis based on performance data and feedback from district community.

Sample Agenda for Data & Tech Analysis

Below is a sample agenda for a facilitated Data & Tech Analysis meeting. Working through the tool typically takes 4 hours depending on the number of people present. The expectation is that all participants have reviewed the categories (listed in this guide) and brainstormed evidence or collected relevant data prior to the start of the session.

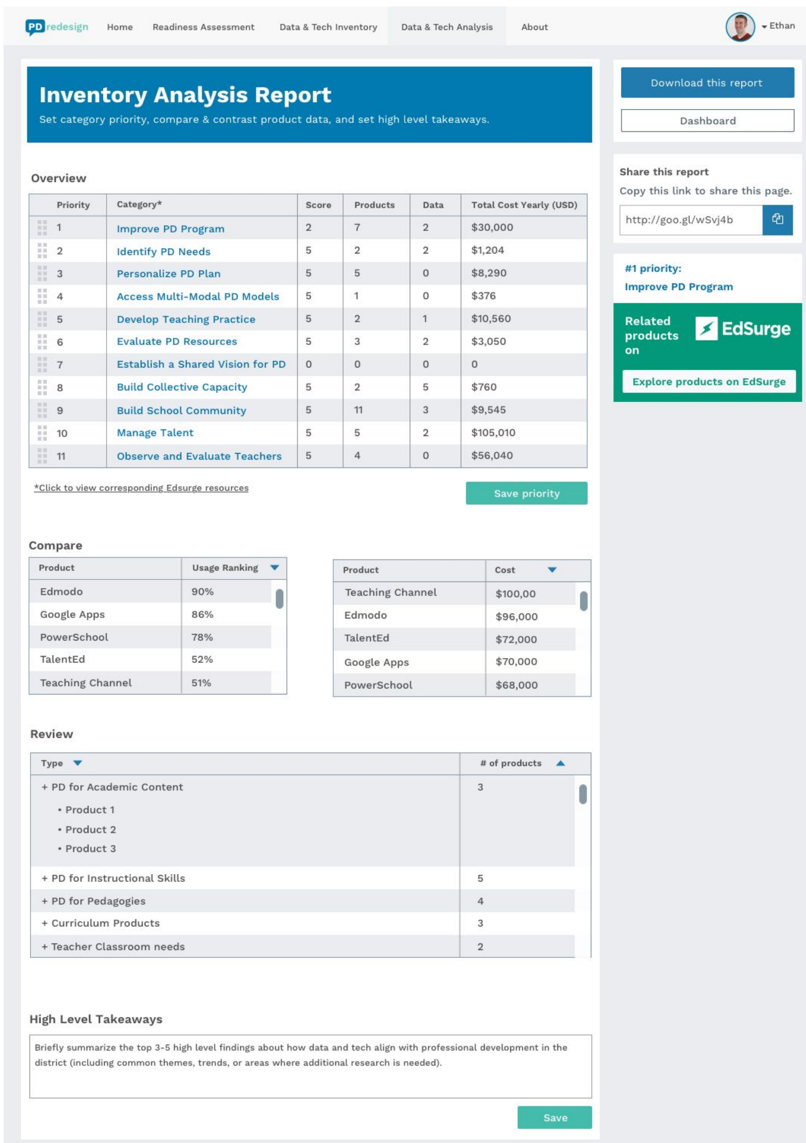
Objective: The objective of this session is to discuss the categories in the PDredesign Data & Tech Analysis tool. Upon completion, our district will have a thorough understanding on how existing data sets and tech products support key areas of professional development.		
Location:	Date:	Time:
Participants:		

Hour	Time	Agenda Topics	Participants
9:00 AM	15 min	Introductions	Core PDredesign Team
9:15 AM	15 min	Session Overview	Core PDredesign Team
9:30 AM	60 min	Data & Tech Analysis Block 1 » Establish a Shared Vision for PD » Identify PD Needs » Personalize PD Plan	Core PDredesign Team
10:30 AM	60 min	Data & Tech Analysis Block 2 » Access Multi-Modal PD Models » Develop Teaching Practice » Build Collective Capacity » Build School Community	Core PDredesign Team School Leaders
11:30 AM	30 min	Data & Tech Analysis Block 3 » Manage Talent » Observe and Evaluate Teachers	Core PDredesign Team HR representative
12:00 PM	30 min	Data & Tech Analysis Block 4 » Evaluate PD Resources » Improve PD Program	Core PDredesign Team Teachers

12:30 PM	30 min	Meeting Close	

Data & Tech Analysis Report

The report provides additional insight into the results and presents a summary view of each category to drive high-level takeaways and next steps.



The score helps highlight strengths and weaknesses while the product and data columns indicate how many Data & Tech Inventory items support learning in that category. The items in this list can be reprioritized depending on district/CMO needs. Additional EdSurge-curated resources and products to aid in improving different areas can be found by clicking the EdSurge banner in the sidebar or the category name in the report.

Sharing the Report:

This report can be shared with other stakeholders through the Share by Link feature or by downloading the data as a .csv and sharing this data via e-mail. Participants and facilitators will also be able to view or share this report.

Questions to Consider Moving Forward:

- What are three to four critical questions you want to be able to answer about the PD experiences of your teachers and the types of PD that are consumed throughout your longer-term PDredesign implementation plan? What data will you need to answer these questions?
- How will your district engage a cohort of teachers throughout the PDredesign implementation plan? What will be the role of teachers and teacher leaders in your PDredesign theory of action?
- Based on this data, how will your district ensure future tech and data purchases are aligned with targeted areas of growth? What will the role of each stakeholder be and how will your district evaluate progress towards this goal?

Data & Tech Analysis Facilitation Best Practices

- Identify an objective facilitator to document and guide the cross-team conversation.
    - Successful facilitators have included both internal personnel and external consultants. Key skills include understanding system redesign, ideally with some content knowledge of school district function and teacher professional development. Facilitators may be program leaders, PDredesign advisors, and others who can ensure that all voices are heard without a vested interest in the outcome. Also, the facilitator enables all key PDredesign leaders to participate fully in the process.
- It is important to drive for clarity by deciding a score for each of the 11 categories. The facilitator should also ensure that each member of the cross-team has had the

opportunity to name supporting products and data and provide insights into each category.

- Remember that the scores are subjective and are meant to align the team towards clear PDredesign innovation and implementation.
- Define and follow up on any next steps your team decides on.