

ATTACHMENT B

SCOPE OF WORK

DEVELOPING AN ALIGNED SYSTEM OF LEADER DEVELOPMENT

WALLACE REQUEST # 20040034.03

SCOPE OF WORK FOR: STATE OF OREGON, EUGENE PUBLIC SCHOOLS

GRANT PERIOD: JULY 1, 2007 THROUGH JUNE 30, 2008

FUNDING REQUESTED FOR THIS PERIOD: \$1,000,000

Program Summary and Goals of Initiative

Key expected accomplishments of the grant; an analysis of how the initiative knits together as a cohesive leadership system aimed at ensuring that school leaders are well-trained in the skills needed to improve instruction and manage change – and are well-supported by policies, job conditions and incentives.

Over the past six years, Oregon's work with The Wallace Foundation has brought Leadership to the forefront as a state priority enabling the state to institutionalize new policies and practices that reflect this. As a result, the state has made considerable progress in putting in place essential elements of an aligned system of leader development. Now that this groundwork has been laid, Oregon is ready to take these features, policies and practice, and knit them together with the thread of standards to strategically and intentionally create an aligned system of leadership development. Oregon intends to do so by:

- Examining training in particular and how the lessons learned from each district can be used to create a training continuum that begins with Pre-service training and recruitment, continues with mentoring and induction, is sustained through ongoing professional development for experienced administrators and is inspired by creative and innovative conversations around research and best practice;
- Bringing the new standards “to life” by linking driver behaviors to the standards as a means of transforming leadership to new heights;
- Using those identified behaviors as a means for developing effective, reliable and valid measures to assess leadership effectiveness and its impact on teaching and learning; and
- Linking all training along the continuum to these assessment and measurement tools so that at every step of the way leaders are supported and motivated to be strong instructional leaders held accountable to having a meaningful impact on the children and schools they serve.

Main sites

- **Beaverton School District**
- **Bend-La Pine School District**
- **Eugene School District**
- **Hillsboro School District**
- **Lincoln County School District**
- **Nyssa School District**

- **Portland School District**
- **Redmond School District**
- **Salem School District**
- **South Lane School District**
- **Springfield School District**

Main partnerships

- **Confederation of School Administrators**
- **The Teachers Standards and Practice Commission**
- **Oregon Professors of Educational Administration**
- **Oregon Association of Latino Administrators**
- **Oregon Education Association**
- **Oregon School Boards Association**
- **Northwest Regional Educational Laboratory**
- **Stand for Children**
- **Nike Corporation**
- **Portland Schools Foundation**

Main strategies

Main approaches toward reaching the goals for 2007-2008

- A. **Standards** - *States and districts are identifying and codifying standards of effective leadership for individuals, teams and programs. Such standards are based on research and feedback from districts and articulate competencies, skills and behaviors in such ways that outcomes can be observed and measured.*

Our main strategy is to develop an aligned system of leadership development through training that reaches all levels of the leadership continuum and is linked to our condition of assessing leadership effectiveness. In order to do this, we will revisit Oregon's new administrative standards and determine what observable behaviors are linked to each standard. This analysis will inform our condition and enable us to develop unbiased, valid and reliable tools to assess leadership effectiveness.

In 2007-2008 the sites will:

- A1. Determine the driver behaviors that are linked to each standard as a means of assessing leadership effectiveness within each context.

- B. **Training and development** - *States and districts are establishing high-quality leader training programs based on the leadership standards (content) and characteristics of effective training programs (process). They assess program quality and outcomes, have evidence to support those assessments and are continuously improving the programs. All leadership training program accreditation requirements are well-connected to the standards.*

In 2007-2008 the site(s) will:

- B1. Enhance Pre-service preparation programs by focusing on recruitment and retention, aligning policy and practice and researching alternatives paths to licensure;
- B2. Develop Principal and Superintendent Induction programs that are aligned with standards and contribute to leadership effectiveness through State Legislation (HB2574), Beginning Administrator Institutes and Continuing Licensure programs;

- B3. Implement Oregon Leadership Network Institutes to sustain leadership development through structured opportunities to learn, collaborate and build on best practice;
- B4. Utilize Professional Learning Initiatives to ensure flexibility and innovation in ongoing professional development that reaches all levels of the Leadership Continuum; and
- B5. Create an Oregon Leadership Network State Consortium used to increase district access to research and best practice, report progress across the state to local and national policy makers and build capacity among non-OLN districts.

C. **Policies and conditions** - *States and districts are improving the policies and the conditions necessary for leaders to lift student achievement, which are based on the leadership standards and could include: changing the criteria for leaders to obtain certification, having and using reliable data to allocate resources (people, time and money); ensuring that roles and responsibilities clearly focus on improving teaching and learning; ensuring that hiring and placement practices, leader evaluation procedures and incentives encourage leaders' behaviors to reflect the standards; and enacting supportive policies.*

The Oregon State Action for Education Leadership Project has selected the following condition: **Leader performance evaluation that assesses the behaviors their training was designed to foster.** This condition is connected to our training goals in two ways: a) The training provides a context through which we can develop the condition; and b) The training provides a context through which we can implement the condition. The condition of "Assessing leadership effectiveness" will be implemented via training strategies one and two (B1 and B2). The condition will be developed and discussed via training strategies three, four and five (B3, B4, B5). It is important that training is used to both *develop* and *implement* the condition to ensure high-quality assessment tools are in place, supported by state and district policies and brought to scale by informed administrators who recognize the merit of this condition in assuring high quality teaching and learning is taking place.

In 2007-2008 the site(s) will:

- C1. Assessing Leadership Effectiveness:** Re-design formal assessments to align with state standards and link them to observable behaviors [Supports training strategies B1 and B2];
- C2. Assessing Leadership Effectiveness:** Showcase the driver behaviors embedded in the standards through real administrators, case studies and research as a means of contextualizing the standards in a visible and tangible way. [Supports training strategies B1, B2, B3]; and
- C3. Assessing Leadership Effectiveness:** Provide training opportunities and facilitated discussions to a) discuss what driver behaviors are linked to each standard; b) discuss behavior variance within district and central office settings; c) contextualize behaviors; d) link performance evaluation to instructional improvement and what it would look like; e) discuss effective strategies currently in use within and outside of Oregon, and challenges to implementation; f) discuss conditions necessary for evaluation to have an impact; g) identify ways that district level training can enhance driver behaviors; h) develop protocol for state to hold districts, and districts to hold schools accountable to producing effective leaders; and i) develop policies that can help bring this condition to scale [Supports training strategies B3, B4, B5].

Scale and sustainability - *The strategies and lessons learned are being or have potential to be used more broadly and there is tangible evidence of structures and policies that will outlast the Wallace funding.*

- Develop Leadership Network Institutes and Leadership Consortium Meetings to ensure the Oregon Leadership Network is continually infused with new knowledge and districts are continually interacting and sharing what works to ensure high-quality leaders continue to emerge and the impact of the evolving aligned system of leader development can be felt statewide.
- Drive for organizational structures to “intensify and focus” rather than “dissipate and scatter”.
- Create internal processes at the state level to ensure the reproduction of successful practice through communications strategies and policy formation (linked to current administrative rule) orchestrated by the Leadership Network Consortium that acts as the State-based “leadership team.”
- Use site visits as a means of assessing: a) what the work looks like in the district context; b) what elements can be replicated; and c) how those efforts can be institutionalized.
- Work with district leadership teams to ensure that after participating in the Leadership Network Institutes, follow-up regional meetings take place to spread the impact and knowledge- learned district-wide.
- Maintain this depth and relevance of the work by a) keeping it as a “state priority” for the State Superintendent of Public Instruction as a means of closing the achievement gap; b) keeping every key leadership partner engaged in the development and facilitation of the work; c) documenting progress and lessons- learned for distribution in network newsletters and publications; d) building an infrastructure to collect and distribute data on the impact of leadership on student achievement.
- Implement state policy that increases the use of state and local Title II funds for Leadership Development and Training;
- Create diversity and cohesion through an intentional mission of developing “culturally competent leaders”
- Continue to document and collect data on lessons learned through partnerships with the Northwest Regional Laboratory, local consultants, district mid and end-of-year reports, and additional ethnographic studies.

Measures

Progress will be measured by:

For the full three-year grant period

Outputs¹:

- Recruitment of, at minimum, one hundred capable and diverse candidates, over the course of 3 years, to participate in pre-service training.

¹ Outputs are the number of “products” that have resulted (for example: number of people trained), outcomes are the results occurring directly from the production of those “products” (for example what trainees can do now – and with what quality – that they couldn’t do before) and impacts are the benefits beyond those affected directly by the work.

- 100% of aspiring administrators statewide receiving culturally competent pre-service preparation training that utilizes a cohort model to increase success at point of entry and over time.
- 100% of New administrators state wide receive access to mentoring programs and new-administrator Institutes
- A minimum of 50% of Oregon school and district leaders participate in OLN Institutes
- School and district leaders from “high-need” or “under-achieving” districts state-wide receive innovative, regional based, professional development opportunities rooted in leadership standards, instructional improvement and evaluation tools and procedures.
- State-wide OLN consortium is strengthened to facilitate conversations between districts, use key research and information to districts state-wide, and build capacity

Outcomes:

- 25% increase in Latino administrators across the state
- All SAELP districts incorporate retention plans as a strategy for keeping new, minority administrators in their district
- Revision of current state administrator tests to assess whether or not new administrators are more prepared as leaders and more aware of the administrative standards and expectations
- Work with the Santa Cruz or similar mentoring program to develop a research based program that ensure new mentors are prepared to mentor new administrators. Will conduct quarterly assessments to ascertain progress with mentoring and effectiveness.
- Eugene and Portland teams in conjunction with state LIG work develop tools and frameworks that can be used to measure leader effectiveness that is aligned with standards and incorporates the needs of individual districts
- Participants in OLN Professional Learning Initiatives will facilitate conversations about research and policy gleaned from the PLI’s both at OLN institutes and through contributions to the OLN bi-annual policy newsletter.
- Districts articulate knowledge of what research is saying about leadership, and what people are doing throughout the state and nation to enhance leadership development, as evidenced by yearly conference presentations they give.

Impacts:

- Increased quantities of diverse, culturally competent instructional leaders throughout the educational leadership system
- Improved retention and accountability for diverse culturally competent and effective instructional leaders
- Nurtured key partnerships with higher education to increase student performance and improve academic outcomes and to sustain progress over time through institutional improvement
- Increased instructional improvement and equity to eliminate achievement and opportunity gaps
- Improved educational outcomes in all academic areas and increased leadership from non-traditional roles.
- Adaptation of leadership standards that reflect local realities

- Enhanced research-based practice and strategies that become habitual and results in increased accessing feedback and knowledge.

For year one (July 1, 2007 – June 30, 2008)

Outputs:

- Contract with OALA is established to address the quickly rising percentage (7.6% increase this year alone) of Hispanic children by increasing the percentage of Latino administrators in the state. Currently Latinos make up 17% of all students in the state, yet they represent less than 5% of administrators
- At least 50% of new administrators throughout the state register for COSA's New Leadership Institute
- 100 Mentees are identified to participate in the "training of trainers" mentoring program
- OLN districts develop administrator evaluation tool that is aligned with Leadership Standards
- Districts that are part of leadership network will participate in at least 2 Professional Learning Initiatives
- State Consortium develops a news publication to be distributed twice-a-year that focuses on best practices and current research on leadership

Outcomes:

- More Latino administrators are recruited and retained
- New administrators are more prepared as leaders and more aware of the administrative standards and expectations
- Mentees are prepared to mentor new administrators
- A tool is developed to measure leader effectiveness that is aligned with standards and incorporates the needs of individual districts
- Learning is strengthened and knowledge is shared throughout the OLN
- More districts are aware of what the research is saying about leadership and what people are doing throughout the state and nation to enhance leadership development

Impacts:

- Increased quantities of diverse, culturally competent instructional leaders throughout the entire leadership system
- Improved retention and accountability for diverse culturally competent and *effective* instructional leaders
- Increased instructional improvement and equity to eliminate achievement and opportunity gaps
- Improved educational outcomes in all academic areas and adaptation of leadership standards that reflect local realities
- Research-based practice and strategy becomes habitual and leaders are able to continually evolve as a result of accessing feedback and knowledge. Encourages a "culture of inquiry". Helps leaders to challenge conventional understanding of leadership and use innovation to create leadership systems, at the local level, that work.

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c. *In addition, provide two progress reports, on September 24, 2007 and February 20, 2008. Guidelines will be sent at least six weeks in advance of the due date.*

Wallace network activities

Participate in:

- Wallace conferences;
- Leadership Issue Groups as appropriate (and as integrated into the strategies sections of this scope of work);
- Regularly-scheduled conference calls with the Wallace program officer;
- Moderated on-line discussions and other on-line activities;
- Executive Leadership Program, as appropriate

Deliverables

Work products and specific dates.

- Two progress reports, due on September 24, 2007 and February 20, 2008. Guidelines will be sent at least six weeks in advance of the due date. These will also be given to the State Board of Education and Board of Educational Examiners.

Publications intended for distribution

Wallace must be informed with sufficient notice if the grantee intends to issue a publication from work related to this grant. Wallace reserves the right to review and comment on drafts prior to publication as defined in Section 3 of the grant agreement.

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Publications intended for distribution

- OLN News brief (formerly known as SAELP Scoop) Electronic Newsletter going out to the network 1/mth.
- The Chronicle of Oregon Leadership Network: Printed publication to go out 2xs/yr

Wallace must be informed with sufficient notice if the grantee intends to issue a publication from work related to this grant. Wallace reserves the right to review and comment on drafts prior to publication as defined in Section 3 of the grant agreement