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Bristol City Schools (BCS)

Jean Campbell, superintendent of Bristol City Schools (BCS), could not believe what she had just read. Sitting at the head of the table in the BCS conference room, she stared in disbelief at her executive staff assembled around her. Campbell had been notified that one of BCS's five area superintendents, Lisa Craig, had tendered her resignation. The resignation letter given to her by Tom Hassler, deputy superintendent of BCS, cited "excessive stress" as the primary reason for Craig's resignation. "The excessive stress of the area superintendent position has become a serious health risk for me as a result of my abnormally high blood pressure," wrote Craig. "This, coupled with my desire to spend more time with my family, has left me no choice but to offer my resignation. I want to be able to give 110% to BCS. Unfortunately, I am not able to do so at this time."

Although Campbell's initial vision called for eight area superintendents to oversee the 147 BCS schools, budget constraints and turnover had left Campbell with only five area superintendents. With Craig's resignation, this number was now down to four. In fact, Craig was the third BCS leadership team member to resign that year (see **Exhibit 1** for BCS organizational chart). As Campbell exited the boardroom, she said to her executive staff, "This is unacceptable. We cannot support Lisa Craig's resignation."

Historical Background

BCS Demographics

Serving 85,692 students in SY04,¹ BCS was a rapidly growing school district in the United States (see **Exhibit 2** for BCS facts and figures). Since 1993, the total enrollment of BCS grew by 20%, up from 71,410 students. This growth rate surpassed that of surrounding districts, many of which experienced enrollment increases ranging from 10% to 15% during the same period. BCS encompassed a diverse student body with more than 60 languages other than English spoken at

¹ PELP cases use the convention "SY" to designate, in this instance, school year 2003–2004.

Professors Richard Elmore and Allen Grossman and Research Associate Modupe Akinola prepared this composite case from multiple sources. To protect individuals and organizations, the case has been disguised. PELP cases are developed solely as the basis for class discussion. Cases are not intended to serve as endorsements, sources of primary data, or illustrations of effective or ineffective management.

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home. Whites represented 31% of BCS students, African-Americans 38%, and Hispanics 16%, while Asians and other ethnicities accounted for 12% and 3%, respectively. At the start of SY04, 60% of BCS students were eligible for free or reduced-price meals, and 11% were learning English for the first time.

BCS's increasing enrollment rate was primarily attributed to Bristol's growing minority population. Over the past 15 years, Bristol had experienced significant growth in its immigrant population as a result of the region's flourishing economy. This gradual influx of immigrants had created pockets of wealth and poverty within Bristol that were easily discernible by the railway lines. South of the Stutton/Greenburg railway line were affluent communities, while north of the railway line housed the majority of the poor neighborhoods.

Superintendent Jean Campbell

During the early 1990s, public dissatisfaction with stagnating student achievement, BCS financial crises, reports of impropriety among district staff, and growing tensions with the unions stimulated the first major reform wave for BCS, led by then-superintendent Eric Layne. Under Layne, BCS balanced the budget; improved school facilities; established accountability measures; ended social promotion; and expanded after-school, early-childhood, and summer school programs. In January 2001, Layne announced his intentions to retire at the end of the academic year, resulting in an aggressive search process for a successor.

In July 2001, the Bristol School Board in an 8–1 vote selected Dr. Jean Campbell as the next superintendent of BCS. A native of Albuquerque, New Mexico, Campbell had experience in education dating back to 1963. Campbell began her career as a math teacher at Sewanee High School in 1963 and culminated it in her most recent position as superintendent of Linden Public Schools. Campbell was renowned in Linden for improving student achievement in low-performing schools and decreasing achievement disparities among all groups of students. As a result of her impressive track record, Campbell was an obvious choice for Bristol City School Board members. "The board made it clear to me that my experience in Linden set me apart from the other candidates," recalled Campbell. "I was charged by the board to demonstrate a laser-like focus on academic achievement, which was the focal point of my tenure in Linden."

Under Campbell's leadership, BCS had begun to make steady improvements in student achievement. Over Campbell's two-year tenure, test scores had risen, and some headway had been made on the troubling long-standing gap in test scores and grades between white and minority students (see **Exhibit 3** for student achievement data). Campbell had worked with staff to develop clear expectations for students at each grade level and implemented standardized reading and math curricula across the district so that students frequently changing schools would be familiar with the curricula. Campbell had also led the effort to revamp early-childhood education and had put more teachers and resources in lower-performing schools.

In addition to making strides in student achievement, Campbell had made significant progress in building relationships with key BCS external stakeholders. Campbell had begun to reverse the decade-long inimical relationship between BCS and the local union, the Bristol Education Association (BEA), representing teachers and administrators. Campbell had also intensified efforts to involve parents in BCS and had challenged BCS and the community to mobilize around student achievement.

Despite these accomplishments, several issues remained at the core of BCS's continuing reform efforts. Among these were gaps in student achievement by race and ethnicity, rising teacher and principal turnover, slowing rates of student improvement, and high school reform. Additionally,

Campbell faced several organizational challenges as a result of budget constraints. With budget cuts throughout the state, central-office staffing had been reduced, resulting in inefficiencies and gaps in communication at BCS.

Campbell's Philosophy

As articulated in its mission statement, BCS aimed to “ensure that each student achieve his or her potential by supporting high-quality teaching and learning and comprehensive academic programs, working in conjunction with the entire community.” Campbell strongly believed that the way to achieve this mission was to focus on improving the quality of instruction in BCS. “My experience in Linden demonstrated that student learning will increase when the interaction between teachers and students is improved,” noted Campbell. “You can have the best curriculum in the world, but if the teacher cannot teach it, student performance will not move one inch.” As a result of this philosophy, Campbell had mobilized the district around deepening teacher practice.

From 2001 through 2002, BCS administration established an aggressive professional development program for its entire staff. Penelope Greene, associate superintendent for instruction, recalled this period: “We examined professional development programs of districts across the country and hired consultants to assist us in developing a comprehensive program that could be rolled out over two to three years.” The professional development program ultimately created by BCS included individualized coaching and monthly training for teachers and principals. In addition, the professional development program trained area superintendents, those responsible for supervising teachers and principals, in areas such as performance management and instructional leadership. “This professional development program was especially attractive to schools as it was fully funded by the district,” noted Greene. In general, resource allocation had been centralized at BCS since the early 1980s, and professional development at BCS had typically come from unrestricted general funds. Based on a standard staffing formula, BCS's Budget and Finance Department would use enrollment numbers to determine the number of staff members required to sufficiently run each school in the district for the academic year. Once staff had been determined and salary and benefits estimated, schools could use any remaining allocated funds toward discretionary uses. “The fact that the newly developed professional development program did not take from schools' discretionary funds was extremely appealing to principals,” Greene concluded.

Although budget constraints had drawn significant attention to the professional development program, Campbell was determined to test the program in 40 of the 147 schools during SY04. “The budgeting process for SY04 was a disaster,” Campbell observed. “In January 2002, I was notified by our state representative that the BCS budget would be reduced by 7% as a result of state budget cuts. I was forced to make some tough decisions and opted to reduce administrative and support expenditures, decrease summer school sessions, institute both hiring and wage freezes, and lay off some teachers. These actions resulted in major backlash from the unions and the local community” (see **Exhibit 4** for BCS budget). As a result of this budget scenario, many internal and external BCS stakeholders had urged Campbell to reduce professional development expenditures. Campbell and the Bristol City School Board had refused to acquiesce to these demands, keeping professional development at 3% of the BCS budget.

The Professional Development Program

Piloting the Professional Development Program

The professional development program developed by BCS provided teachers with specific blocks of time for professional development directed at improving teachers' skills and practices. Another hallmark of the program was the use of "walkthroughs" to assist principals and teachers with specific instructional support needs. At least once each semester, area superintendents, each of whom was assigned to eight pilot schools, would visit their assigned schools to analyze teacher practice and school and classroom environments with the school principal. Walkthroughs were not intended to be a mechanism for judging teacher performance, but rather to provide the principal and area superintendent with an opportunity to discuss classroom observations and agree upon areas of improvement and key next steps. These walkthroughs provided useful data on the integration of teaching tools and techniques introduced during the monthly professional development sessions that teachers were required to attend. Monthly professional development sessions focused in detail on curriculum and instructional practice in specific content areas.

In addition to walkthroughs, area superintendents were responsible for supervising principals and coaching them in the evaluation and supervision of teachers. The district also required principals to participate in monthly principal conferences by area. This professional development provided principals with informational knowledge on coaching models and walkthrough procedures. According to Associate Superintendent for Instruction Greene, principals responded very differently to the monthly principal conferences. "Area superintendents have reported that many principals are frustrated with the conferences," observed Greene. "Their biggest complaint is that the majority of principal conferences evolve into griping sessions. Many are skeptical as to the true value of attending these conferences."

As a result of the professional development program, the 40 pilot schools had begun to experience increased rates of improvement. One school that had boasted particularly impressive results was Ridgeway Middle School as demonstrated during walkthroughs and by its students' performance on the State Test of Basic Skills (STBS), the annual statewide evaluation for certain grade levels.

Maria Fernandez, the area superintendent with oversight of Ridgeway Middle School, attributed most of the school's success to teacher coaching and adherence to the districtwide curriculum. Fernandez explained:

I have been an area superintendent in BCS for the past eight years and have never witnessed such dramatic results in a school. Each of my walkthroughs demonstrated that teachers at Ridgeway were diligently following the standardized Pearlman math and Sutton reading curricula adopted by BCS in 2001. This past summer, we instituted a one-week, 40 hour-long curriculum training program to train teachers on the new standardized curriculum. While the process was time intensive, the hours were well spent. The summer curriculum training has also been supplemented through monthly training sessions during the year. This curriculum training in addition to the mandatory teacher training from the professional development program has transformed teaching and learning in the classroom, particularly at Ridgeway.

However, Fernandez expressed concerns over the perception of walkthroughs. "Teachers are still very distrustful of walkthroughs," noted Fernandez. "I feel a negative sentiment each time I enter the school." Despite the attempts of BCS area administrators to model good instructional oversight for principals and to position walkthroughs as learning vehicles, teachers felt threatened by the presence

of the area superintendent and principal in the classroom and had expressed this concern to both district and union representatives. Fernandez recalled her colleague Frank Roman's troubling story regarding this issue. "Following my walkthrough, I pulled aside a teacher to tell him he was doing a good job," said Roman. "I mentioned he should try using the chalkboard to explain especially difficult concepts. This teacher later complained to his principal about my comment. The teacher thought my comment was inappropriate." Fernandez wondered whether the teacher's reaction was indicative of poor instructional oversight on the part of Roman, or whether teachers were still unclear about the purpose and goal of walkthroughs.

Evaluating the Professional Development Program

The most recent weekly area superintendent meeting had surfaced a variety of challenges with the existing professional development program. Area superintendents had complained about the time constraints placed on them as a result of the numerous administrative issues on their plate. Many area superintendents found themselves mired in paperwork, particularly related to federal mandates. For instance, area superintendents with coverage over schools with largely immigrant populations spent a large percentage of their time completing English Language Acquisition (ELA) paperwork. Not only were these area superintendents constantly monitoring BCS's conformity to regulations surrounding ELA teacher certification, but they were also responsible for tracking student attendance in ELA programs. This task was especially complicated given the three-year ELA program participation limit per student. BCS's high mobility rate impeded area superintendents from effectively tracking this data. Area superintendents were also responsible for completing No Child Left Behind (NCLB) paperwork. This included notifying parents that their children were eligible for school choice if their children were in BCS schools identified as needing improvement, corrective action, or restructuring. Fifty BCS schools fell into this category, requiring area superintendents to send personalized parental letters no later than the first day of the school year following the year for which a particular school had been identified for improvement.

These responsibilities had hindered many area superintendents from following the established walkthrough schedule. Furthermore, many area superintendents had found themselves actively involved in strengthening community relations. For example, a recent altercation on the front steps of Merrywood High School had resulted in hours of meetings with parents and the community for the principal and area superintendent in charge of Merrywood High.

These demands had not only prevented area superintendents from performing walkthroughs but had also interfered with their own professional development. The professional development program was intended to give area superintendents greater clarity on their role as instructional leaders and involved specific training for area superintendents based on their individual developmental needs. All five area superintendents had extensive experience in education, as three were former principals and two had come from district administration (see **Exhibit 5** for area superintendent bios). Greene believed many still needed training in areas such as performance management, coaching, instructional leadership, time management, and more technical matters such as budgeting and data collection and analysis.

According to Tom Hassler, deputy superintendent of BCS, area superintendents remained confused about their role in the organization. "Each area superintendent has gone off in a somewhat different direction," expressed Hassler. "Some spend significant time dealing with the community, others tend to micromanage teachers and principals. There is no shared understanding of the role of the area superintendent." Furthermore, Hassler was concerned about the numerous calls he received weekly from principals. Rather than going directly to area superintendents for questions and feedback, principals were communicating directly with Hassler and Greene. Hassler speculated that

this was a vestige of site-based management and the former decentralized management system at BCS. In addition, for the 40 schools in which the professional development program was being implemented, the level of best-practice sharing across the district was unclear. Teachers, principals, and area superintendents complained that there were too few opportunities for participants in the professional development program to meet and capture both the strengths and weaknesses of the program.

This feedback corroborated Campbell's greatest concern, that her vision for BCS had not filtered down throughout the organization. "We have clearly articulated a vision over the past few years," expressed Campbell. "All of our efforts are centered around improving teacher quality. Area superintendents should be focused on those activities that directly support this vision. I don't understand what the confusion is all about."

While the professional development pilot was at the forefront of Campbell's mind, several additional issues concerned her. Among these were BCS's recruitment process and its performance evaluation system.

Recruitment

Campbell and the BCS leadership team had grown increasingly frustrated about the way in which teacher recruitment was handled both at the school level and the district level. "A strong professional development program needs to be accompanied by a recruitment system which brings talented teachers to the district," noted Campbell. Teacher recruitment was of particular concern for BCS administrators, as 20% of new teachers left the district within three years and several teachers were approaching retirement.

Associate Superintendent of Human Resources Mary Richards had managed both recruitment and staffing for BCS since 1995. Richards had been the head of human resources at Bevelis Corporation and at two nonprofit organizations, Year Corps and the American Red Cross, before transitioning to her role as head of HR at BCS. "I was looking for opportunities to share the expertise I had gained in human resources both in the private and nonprofit sectors. I was particularly interested in working at BCS, as my children had gone through the BCS system and my eldest daughter had been a teacher in the district for three years," Richards recalled. During her eight-year tenure, Richards had made sweeping changes in BCS's HR function. Richards had introduced electronic payroll and direct-deposit systems, led the task force in creating the new professional development program, and implemented an online teacher application system. Richards's goal was to make BCS a paperless organization by 2006. Richards could be heard saying, "If it's not online, it's not on time" and had this slogan plastered across the HR department.

Despite attempts to streamline the hiring process, Richards considered teacher recruitment to be the most challenging item on her agenda. "The recruiting process has become increasingly mismanaged," Richards remarked. "Schools continue to hire new teachers in a haphazard manner. It is no wonder why each July we are scrambling to fill the numerous teacher vacancies throughout the district." In order to gain better clarity on recruitment practices across the district, Richards would informally interview new teachers at randomly selected schools within BCS. Richards was greatly dismayed by her most recent interview as she had asked John Cowen, a ninth-grade history teacher at Jackson-Randolph High School, about his hiring process. Richards had received the following response from Cowen:

I had told one of my ed school classmates, who at the time was a teacher in BCS, that I was planning to relocate to Bristol City. This buddy of mine had seen me teach on several occasions and said he would recommend me to his school principal, as there were a few vacancies at his high school. After hounding his school administrators to interview me, I finally received an interview. You know, this friend of mine has a lot of clout, as he was a student member of the school board when he was a senior in high school. He is also very politically active in Bristol City, so he was very confident that he could get me an interview.

In April, I flew down to the school for an informational interview. I was told by my interviewers that they did not know if any positions would be available for the following school year. I knew this was not the case, as my friend had already told me about some vacancies, so I just sat tight. In the meantime, my friend continued to bother his school administrators about me because as he put it, "They were not hot on the recruiting trail." Well, two weeks after the interview, I was offered a job. I was elated.

The funny thing is, I had also applied to BCS via the online application system on the Web site. To this day, I haven't heard back from BCS, although I am now a teacher at Jackson-Randolph.

Richards had heard many stories similar to this one. In fact, in her last meeting with her boss, Chief Administrative Officer Larry Jordan, she had stated that "clearly some schools have managed the hiring process quite well. However, we need to find the best balance between a centralized and decentralized recruitment system." Jordan had mentioned this issue to Campbell during SY03. Campbell too was unclear about the most effective way to address BCS's recruitment inefficiencies and was looking to Jordan and Richards for some recommendations.

Performance Evaluation

Richards had also expressed concern to Jordan about whether performance evaluation needed to be subsumed under the Instruction Department. In some ways, Richards believed that the existing structure in which Richards managed the performance evaluation process while Greene and her team conducted performance evaluations was logical, as Richards and her team were responsible for all confidential employee files. However, over time, Richards had experienced increasing resistance from Greene's team in her attempts to manage the statewide performance evaluation process.

In 2000, Richards had worked with Greene to prepare her area superintendents to implement the state-mandated performance evaluation process across all BCS schools. The performance evaluation process required that each teacher undergo three formal observations during the year. Formal observations were utilized in addition to walkthroughs. The first formal observation was to occur at the beginning of the academic year, while the remaining two could occur at any point during the year. Formal observations were conducted by certified administrators with both teaching and administrative experience. Formal observations were preceded by pre-observation meetings between the certified observer and the teacher being observed. In these meetings, the observer would walk the teacher through the observation categories (see **Exhibit 6** for the state formal observation form) and the teacher would share the lesson plan for the week with the certified observer.

Once the pre-observation meeting had taken place, the observer would watch the teacher in the classroom for 30 minutes to one hour. A post-observation interview would then be scheduled between the observer and the teacher to discuss the classroom observation and review the completed formal observation form. The post-observation interview would also include discussion around any

areas of improvement and other desired outcomes. The final step in the performance evaluation process was for the formal observation form to be signed and placed in the teacher's employee file.

Many teachers had complained about the shortcomings of this performance evaluation process. "In my five years as a teacher in the district, I have had six formal observations when I should have had 15. I even know some teachers who have never been observed. How are we supposed to improve if we are never evaluated?" noted one teacher. Furthermore, teachers criticized the effectiveness of the process. "Formal observations aren't random, so any teacher can dupe the system if they want to. We have some great actors in my school who teach in a completely different manner when they are being observed. When the observer is in the classroom, it's show time!" stated another BCS teacher. "Sometimes, observers don't conduct the pre-observation, and some have even asked us to complete our own formal evaluation forms."

This feedback infuriated Richards, who had met with Greene on several occasions to express her discontent with the execution of formal observations. During their last meeting, Greene was exasperated and asked Richards, "How do you expect us to coordinate walkthroughs, receive and recommend professional development, and execute formal observations? We need to take things one step at a time. There is no way my group can meet all the demands you are placing on them." Both Richards and Greene had complained to Jordan and Hassler, both of whom had voiced their concerns to Campbell. In particular, Hassler had begun to question the role of performance evaluation in driving student improvement at BCS. "We need to think about what we are trying to accomplish with performance evaluations," he told Campbell. Hassler was especially worried about pace and timing. "I think BCS is going to implode if we keep up this pace of change," he cautioned.

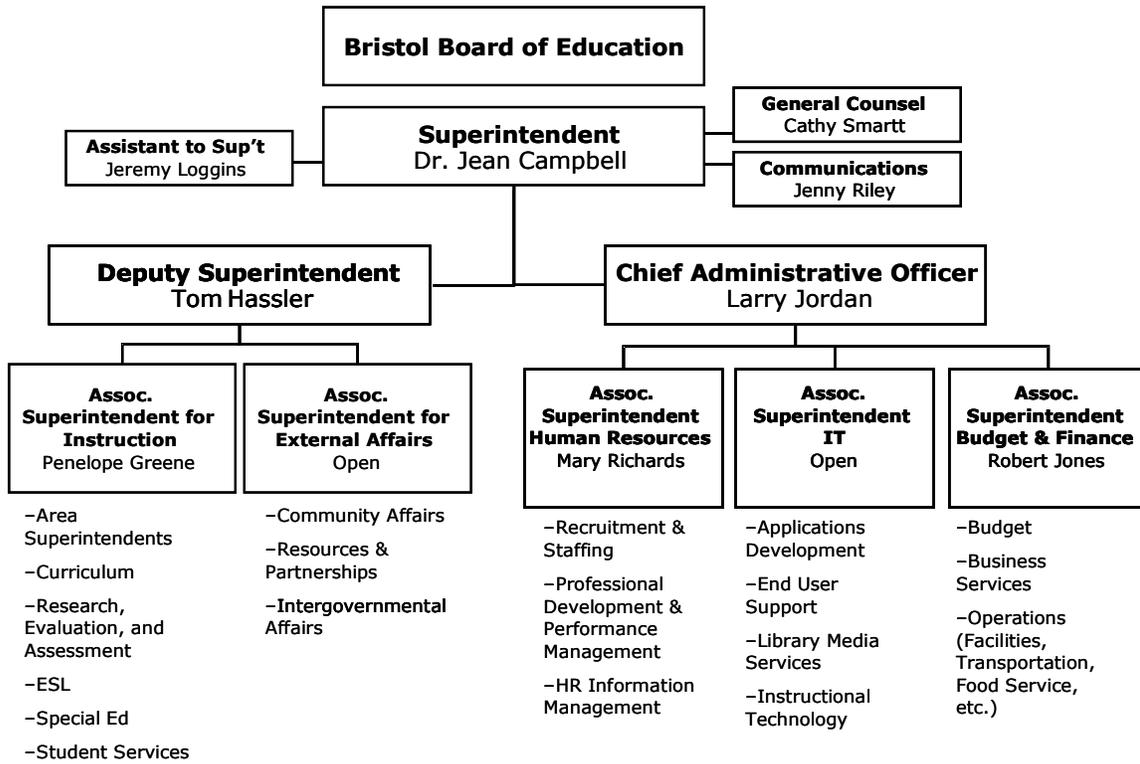
Campbell was well aware of the pressures being placed on her management team. However, she also realized that this was the first stage in implementing BCS's strategy and knew this reaction did not bode well for the many additional changes that needed to take place at BCS. If Richards and Greene could not collaborate on the existing performance evaluation system, Campbell wondered, how would BCS pull off more challenging tasks, such as implementing an information system to capture teacher and student-specific data in an effort to track teacher performance on a student-by-student basis and meet the demands of No Child Left Behind?

Next Steps

As Campbell walked down the corridor to her office, she reflected on the executive staff meeting. SY04 had placed numerous demands on BCS staff, and Campbell was concerned that the effects were becoming increasingly noticeable, causing morale to falter.

Campbell reached her office and dialed her assistant's extension. "I'd like to meet with Lisa Craig this afternoon. Can you make that happen?" she asked and put down the receiver at her assistant's affirmative response. Campbell sat at her desk, looked out the window, and wondered how she would convince Craig to resume her position at BCS and slow the attrition of key personnel.

Exhibit 1 BCS Organizational Chart



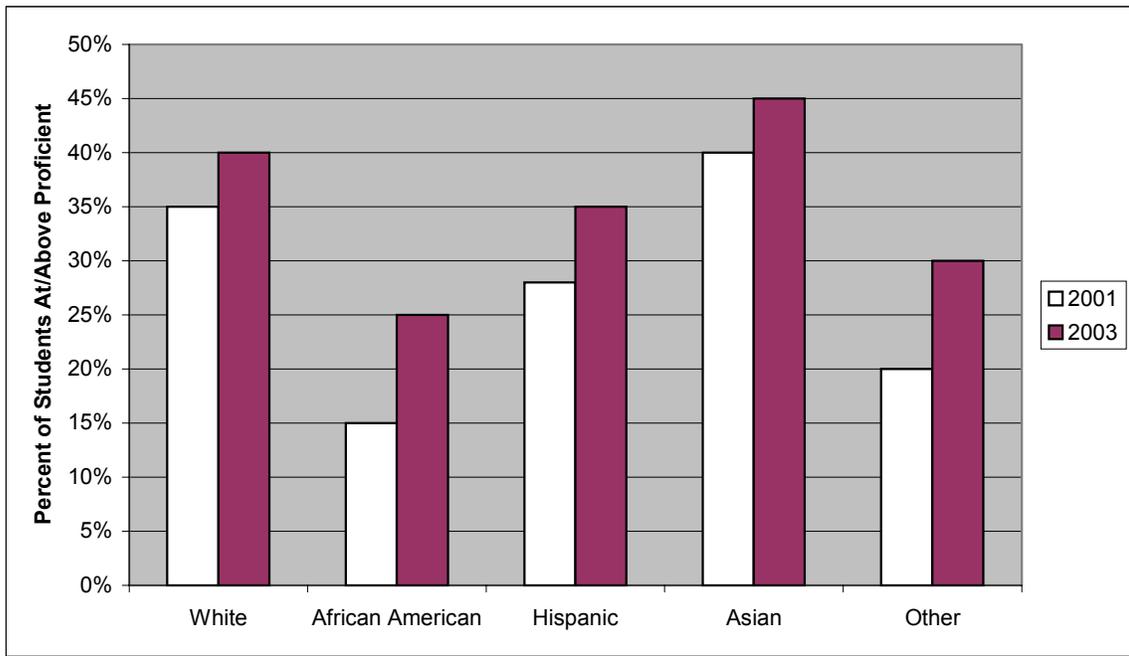
Source: Bristol City Schools.

Exhibit 2 Bristol City Schools (BCS) Facts and Figures

	SY04
District Area Demographics:	
Total population	897,122
Per capita income (in 1999)	\$23,951
Household income in 1999 below poverty level	15.6%
Student Demographics:	
Number of students (K–12)	85,692
African-American	38.4%
White	30.8%
Hispanic	15.6%
Asian	12.2%
Other	3.0%
Free and reduced-price lunch	60.3%
Students with IEPs	13.6%
English language learners	11.2%
Dropout rate	15.3%
Mobility rate	30.0%
Schools:	
Number of schools	147
Elementary (K–5 or K–6)	100
Middle	27
High (9–12 or 10–12)	20

Source: Bristol City Schools.

Exhibit 3 State Test of Basic Skills (STBS) Results by Ethnicity and Race 2001 and 2003 (Grades 3–8 Combined)



Source: Bristol City Schools.

Note: STBS is graded at four levels: below basic, basic, proficient, and advanced.

Exhibit 4 BCS Budget SY04 (US\$ millions)

	SY04	% of Total
Total Budget	752.0	100%
Income		
Revenue from local sources	345.9	46%
Revenue from state sources	308.3	41%
Revenue from federal sources	67.7	9%
Revenue from other sources	30.1	4%
Total Income	752.0	100%
Expenses		
Salaries & Benefits	571.5	76%
Staff Development	22.6	3%
Books & Supplies		
Curriculum	37.6	5%
Other Supplies	22.6	3%
Services	45.1	6%
Other	52.6	7%
Total Expenses	752.0	100%

Source: Bristol City Schools.

Exhibit 5 Area Superintendent Bios

Maria Fernandez is a 15-year veteran of BCS. Fernandez has held many positions during her tenure with the district. She was a high school English teacher for half of her career and became a successful middle school principal at Smith and Hampton. In addition, Fernandez was the district coordinator for BCS's staff development. Fernandez has been an area superintendent in BCS for the past eight years.

Russ Parker has been an area superintendent in BCS for four years. Prior to joining BCS, Parker was a high school principal, assistant superintendent, and superintendent of schools in Pittsburgh and New Brunswick. Parker served as the vice president of the Pittsburgh High School Reform Network. In addition, Parker helped to design and open two state-of-the-art high schools in New Brunswick.

Frank Roman began his career in education as a middle school science teacher in Europe. Roman later moved to the U.S. and joined the staff of Center Middle School as a science teacher. Roman was promoted to department chair in 1985 and two years later joined a task force to design a new K–12 science curriculum for BCS. While at the district office, Roman volunteered for the union negotiating team and became the district's chief negotiator. Roman has been an area superintendent in BCS for the past 10 years.

Francine Rodden is a 30-year veteran of BCS. Rodden began her career as a social studies teacher before becoming an assistant principal at Sherwood High School, BCS's largest high school. Rodden was the assistant principal of Sherwood for 12 years and was later promoted to principal in 1998. Rodden has served as an area superintendent since 2000.

Lisa Craig has been an area superintendent in BCS for two years. A former statistician, Craig joined BCS in 1993 in the Research and Assessment Division. Craig worked in assessment for two years before assuming control of the department. While in assessment, Craig helped to design a new set of performance metrics for BCS. In 2001, Craig transitioned to the area superintendent position.

Source: Bristol City Schools.

Exhibit 6 State Formal Observation Form

Frame Factor Information (Please Print)

Teacher's Name: _____
 _____ (Last) _____ (First) _____ (Middle)

SS# _____
 Institution of Graduation _____ Inst # _____
 Graduated from a College of Education 1. YES 2. NO
 Number of Complete Years of Teaching Experience _____
 District Name BRISTOL CITY Number 003
 School Name _____ Number _____

Observer's Name: _____
 _____ (Last) _____ (First) _____ (Middle)

SS# _____
 Position 1. Principal 2. Ass't Principal 3. Teacher 4. Other
 Class/ Grade Level _____
 Subject Area Observed
 1. Language Arts 9. Home Economics
 2. Foreign Language 10. Other Vocational Ed.
 3. Social Studies 11. Arts
 4. Mathematics 12. Music
 5. Science 13. Exceptional Stud. Ed.
 6. Physical Education, ROTC 14. Other (Specify) _____
 7. Business Education, DCT, CBE _____
 8. Industrial/Arts/Education _____

Type of Classroom Facility in Which the Observation Occurred
 1. Regular Classroom – Self-contained, Open, Pod
 2. Laboratory or Shop
 3. Field, Court, or Gymnasium
 4. Media Room or Library

Total Number of Students in Class _____
 Observation Information Date ____/____/____
 Scope of Observation 1. Prof. Dress 2. Dist. Assess.
 3. Other (Specify) _____
 Screening Obs. 1. 2. 3. 4.
 Summative Obs. 1. 2. 3. 4.
 Time Observation Begins __ : __ : __ Observation Ends __ : __ : __
 Test Begins __ : __ : __ Test Ends __ : __ : __

Methods Used in the Observed Lesson
 1. Lecture
 2. Interaction/Discussion
 3. Independent Study/Labor Shop Work

Teacher's Signature _____
 Observer's Signature _____

State Department of Education - Division of Human Resource Development
State Performance Measurement System
Screening/Summative Observation Instrument

DOMAIN		TOT FREQ	FREQUENCY	FREQUENCY	TOT FREQ	
3.0 Instructional Organization and Development	1. Begins instruction promptly				1. Delays	
	2. Handles materials in an orderly manner				2. Does not organize material systematically	
	3. Orients students to classwork and maintains academic focus				3. Allows talk/activity unrelated to subjects	
	4. Conducts beginning/ending review				4.	
	5. Questions: academic comprehension... developmental	a. Single faceted (domain 3.0)				5a. Allows unison response
		b. Requires analysis and reasoning				5b. Poses multiple questions asked as one
					5c. Poses nonacademic questions/misuses domain or procedural questions	
	6. Recognizes responses/amplifies/gives correct feedback				6. Ignores students or responses/expresses sarcasm, disgust, harshness	
	7. Gives specific academic praise				7. Uses general, nonspecific praise	
	8. Provides for practice				8. Extends discourse, changes topic with no practice	
9. Gives directions/assigns/checks comprehension of homework...				9. Gives inadequate direction on homework/no feedback		
10. Circulates and assigns students				10. Remains at desk/circulates inadequately		
4.0 Presentation of Subject Matter	11. Treats concepts – definition/attributes/examples				11. Gives definitions or examples only	
	12. Discussed cause-effect/uses linking words/applies law or principle				Discusses either cause or effect only/uses no linking words	
	13. States and applies academic rules				13. Does not state or does not apply academic rule	
	14. Develops criteria and evidence for value judgment				14. States value judgments with no criteria or evidence	
5.0 Communication: Verbal and Nonverbal	15. Emphasizes important points				15.	
	16. Expresses enthusiasm verbally/challenges students				16.	
	17.				17. Uses vague/scrambled discourse	
	18.				18. Uses loud, grating, high pitched monotone, or inaudible talk	
	19. Uses body behavior that shows interest – smiles, gestures				19. Frowns, deadpan or lethargic	
2.0 Management of Student Conduct	20. Stops misconduct				20. Delays desist/doesn't stop misconduct/desists punitively	
	21. Maintains instructional momentum				Loses momentum – fragments academic directions, over dwells	
Observer's Notes: _____						

Number of Students Not Engaged

1

2

3

4