The EQuIP Collaborative: Educators Evaluating Quality Instruction Products

National Conference on Education

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Overview

- The What and How of the EQuIP Collaborative
- The Tri-State Rubrics Development
- The (mathematics) Rubric’s Dimensions
- The Review Process
- How States Are Leveraging EQuIP and the Rubrics
- Next Steps
Overview

- Initiative of the American Diploma Project (ADP) Network designed to identify high-quality materials that communicate the instructional demands of the CCSS
- EQuIP builds on the efforts of the Tri-State Collaborative and the rubrics and processes that have been developed collaboratively by Massachusetts, New York and Rhode Island
- Includes teams from more than 20 states

Objectives

- Increase the supply of high quality instructional materials aligned to the CSSS that are available to elementary, middle, and high school teachers as soon as possible
- Build the capacity of educators to evaluate and improve where necessary the quality of instructional materials for use in their schools/classrooms
Participating EQuIP States
Educational leaders from Massachusetts, New York, and Rhode Island

Work started in 2011

Developed criterion-based rubrics and a review process to evaluate the quality and alignment of lessons and units

- Tri-State Quality Review Rubric for Lessons & Units: ELA/Literacy (Grades 3-5) and ELA (Grades 6-12)
- Tri-State Quality Review Rubric for Lessons & Units for ELA/Literacy (Grades K-2)
- Tri-State Quality Review Rubric for Lessons & Units: Mathematics

Conducted three field tests
The Tri-State Rubric Design

The Tri-State Rubric is designed to evaluate:

- **Lessons** that include instructional activities and assessments aligned to the CCSS that may extend over a few class periods or days.
- **Units** that include integrated and focused lessons aligned to the CCSS that extend over a longer period of time.
- The rubric is **NOT** designed to evaluate a single task or activity.
- *The Tri-State Rubric does not require a specific template for lesson or unit design.*
Initial EQuIP convenings

Focused on:

- **Capacity building** - shared understanding of quality and alignment within and across state teams
- **Providing feedback** - identifying the criteria that are met and providing feedback on improvements needed to meet the criteria.

**EQuIP meetings and state support structured to:**

- **Apply common criteria** to evaluate the alignment and quality of current instructional materials (lessons, units) and to identify what improvements might be made to better address the CCSS.
- **Include the rubric and processes** as part of a professional development plan to build the capacity of educators across the state to evaluate the quality of instructional materials for use in their schools/classrooms.
- **Identify potential models of quality lessons/units** that can be revised/refined and used in the state and potentially shared with members of the EQuIP collaborative.
The Rubric Organizes Criteria that Describe Quality Lessons/Units

Criteria that define the rubric are organized to describe quality in **four dimensions**.

<table>
<thead>
<tr>
<th>Grade</th>
<th>Mathematics Lesson/Unit Title</th>
<th>Overall Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>I. Alignment to the Rigor of the CCSS</td>
<td>II. Key Areas of Focus in the CCSS</td>
<td>III. Instructional Supports</td>
</tr>
<tr>
<td>The lesson/unit aligns with the letter and spirit of the CCSS:</td>
<td>The lesson/unit reflects evidence of key shifts that are reflected in the CCSS:</td>
<td>The lesson/unit is responsive to varied student learning needs:</td>
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<tr>
<td>○ Targets a set of grade level mathematics standard(s) at the level of rigor in the CCSS for teaching and learning. **</td>
<td>○ Focus: Centers on the concepts, foundational knowledge, and level of rigor that are prioritized in the standards. **</td>
<td>○ Includes clear and sufficient guidance to support teaching and learning of the targeted standards, including, when appropriate, the use of technology and media. **</td>
</tr>
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<td>○ Standards for Mathematical Practice that are central to the lesson are identified, handled in a grade-appropriate way, and well connected to the content being addressed. **</td>
<td>○ Coherence: Makes connections and provides opportunities for students to transfer knowledge and skills within and across domains and learning progressions.</td>
<td>○ Uses and encourages precise and accurate mathematics, academic language, terminology, and concrete or abstract representations (e.g., pictures, symbols, expressions, equations, graphics, models) in the discipline. **</td>
</tr>
<tr>
<td>○ Presents a balance of mathematical procedures and deeper conceptual understanding inherent in the CCSS.</td>
<td>Rigor: Requires students to engage with and demonstrate challenging mathematics in the following ways:</td>
<td>Engages students in productive struggle through relevant, thought-provoking questions, problems, and tasks that stimulate interest and elicit mathematical thinking.</td>
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<tr>
<td>○ Application: Provides opportunities for students to independently apply mathematical concepts in real-world situations and problem solve with persistence, choosing and applying an appropriate model or strategy to new situations.</td>
<td>○ Conceptual Understanding: Requires students to demonstrate conceptual understanding through complex problem solving, in addition to writing and speaking about their understanding.</td>
<td>Addresses instructional expectations and is easy to understand and use.</td>
</tr>
<tr>
<td>○ Procedural Skill and Fluency: Expects, supports, and provides guidelines for procedural skill and fluency with core calculations and mathematical procedures (when called for in the standards for the grade) to be performed quickly and accurately.</td>
<td>○ Gradually remove supports, requiring students to demonstrate their mathematical understanding independently.</td>
<td>Provides appropriate level and type of scaffolding, differentiation, intervention, and support for a broad range of learners.</td>
</tr>
</tbody>
</table>

| Rating: 3 2 1 0 | Rating: 3 2 1 0 | Rating: 3 2 1 0 | Rating: 3 2 1 0 |

A unit or longer lesson should:
- Use varied modes of curriculum embedded assessments that may include pre-, formative, summative and self-assessment measures.
Dimension I. Alignment to the Rigor of the CCSS

The lesson/unit aligns with the letter and spirit of the CCSS:

- Targets a set of grade level mathematics standard(s) at the level of rigor in the CCSS for teaching and learning.

- Standards for Mathematical Practice that are central to the lesson are identified, handled in a grade-appropriate way, and well connected to the content being addressed.

- Presents a balance of mathematical procedures and deeper conceptual understanding inherent in the CCSS.
The lesson/unit reflects evidence of key shifts that are reflected in the CCSS:

- **Focus**: Centers on the concepts, foundational knowledge, and level of rigor that are prioritized in the standards.

- **Coherence**: Makes connections and provides opportunities for students to transfer knowledge and skills within and across domains and learning progressions.

- **Rigor**: Requires students to engage with and demonstrate challenging mathematics in the following ways:
  - Application: Provides opportunities for students to independently apply mathematical concepts in real-world situations and problem solve with persistence, choosing and applying an appropriate model or strategy to new situations.
  - Conceptual Understanding: Requires students to demonstrate conceptual understanding through complex problem solving, in addition to writing and speaking about their understanding.
  - Procedural Skill and Fluency: Expects, supports, and provides guidelines for procedural skill and fluency with core calculations and mathematical procedures (when called for in the standards for the grade) to be performed quickly and accurately.
The lesson/unit is responsive to varied student learning needs:

- Includes clear and sufficient guidance to support teaching and learning of the targeted standards, including, when appropriate, the use of technology and media.
- Uses and encourages precise and accurate mathematics, academic language, terminology, and concrete or abstract representations (e.g. pictures, symbols, expressions, equations, graphics, models) in the discipline.
- Engages students in productive struggle through relevant, thought-provoking questions, problems, and tasks that stimulate interest and elicit mathematical thinking.
- Addresses instructional expectations and is easy to understand and use.

Provides appropriate level and type of scaffolding, differentiation, intervention, and support for a broad range of learners.

- Supports diverse cultural and linguistic backgrounds, interests, and styles.
- Provides extra supports for students working below grade level.
- Provides extensions for students with high interest or working above grade level.
Dimension III. Instructional Supports

(Cont. from previous slide)

- **A unit or longer lesson should:**
  - Recommend and facilitate a mix of instructional approaches for a variety of learners, such as using multiple representations (including models), using a range of questions, checking for understanding, flexible grouping, pair-share, etc.
  - Gradually remove supports, requiring students to demonstrate their mathematical understanding independently.
  - Demonstrate an effective sequence and a progression of learning where the concepts or skills advance and deepen over time.
  - Expects, supports, and provides guidelines for procedural skill and fluency with core calculations and mathematical procedures (when called for in the standards for the grade) to be performed quickly and accurately.

**NOTE:** These criteria apply specifically to pieces or collections of work that require longer periods of time to implement, units or longer lessons. A lesson/unit can still be considered for a 3-rating, relative to the criteria of a particular dimension without meeting ALL of the criteria, especially if the criteria are
The lesson/unit regularly assesses whether students are mastering standards-based content and skills:

- Is designed to elicit direct, observable evidence of the degree to which a student can independently demonstrate the targeted CCSS.

- Assesses student proficiency using methods that are accessible and unbiased, including the use of grade level language in student prompts.

- Includes aligned rubrics, answer keys, and scoring guidelines that provide sufficient guidance for interpreting student performance.

A unit or longer lesson should:

- Use varied modes of curriculum embedded assessments that may include pre-, formative, summative and self-assessment measures.
Rating Scales

Rating Scale for Dimensions I, II, III, IV:

- 3: Meets most of the criteria in the dimension
- 2: Meets many of the criteria in the dimension
- 1: Meets some of the criteria in the dimension.
- 0: Does not meet the criteria in the dimension

Overall Rating for the Lesson/Unit:

- **E: Exemplar** - Aligned and meets most to all of the criteria in dimensions II, III, IV (total 11 – 12)
- **E/I: Exemplar if Improved** – Aligned and needs some improvement in one or more dimensions (total 8 – 10)
- **R: Revision Needed** – Aligned partially and needs significant revision in one or more dimensions (total 3 – 7)
- **N: Not Ready to Review** – Not aligned and does not meet criteria (total 0 – 2)
Descriptive Scales

Descriptors for Dimensions I, II, III, IV:
• **3: Exemplifies CCSS Quality** - meets the standard described by criteria in the dimension, as explained in criterion-based observations.
• **2: Approaching CCSS Quality** - meets many criteria but will benefit from revision in others, as suggested in criterion-based observations.
• **1: Developing toward CCSS Quality** - needs significant revision, as suggested in criterion-based observations.
• **0: Not representing CCSS Quality** - does not address the criteria in the dimension.

Descriptor for Overall Ratings:
• **E: Exemplifies CCSS Quality** – Aligned and exemplifies the quality standard and exemplifies most of the criteria across Dimensions II, III, IV of the rubric.
• **E/I: Approaching CCSS Quality** – Aligned and exemplifies the quality standard in some dimensions but will benefit from some revision in others.
• **R: Developing toward CCSS Quality** – Aligned partially and approaches the quality standard in some dimensions and needs significant revision in others.
• **N: Not representing CCSS Quality** – Not aligned and does not address criteria.
1. **Common Core**: Before beginning a review, all members of a review team are familiar with the Common Core Standards.

2. **Inquiry**: Review processes emphasize inquiry rather than advocacy and are organized in steps around a set of guiding questions.

3. **Respect & Commitment**: Each member of a review team is respected as a valued colleague and contributor who makes a commitment to the EQuIP process.

4. **Criteria & Evidence**: All observations, judgments, discussions, and recommendations are criterion- and evidence-based.

5. **Constructive**: Lessons/units to be reviewed are seen as “works in progress.” Reviewers are respectful of contributors’ work and make constructive observations and suggestions based on evidence from the work.

6. **Individual to Collective**: Each member of a review team independently records his/her observations prior to discussion. Discussions focus on understanding all reviewers’ interpretations of the criteria and the evidence they have found.

7. **Understanding & Agreement**: The goal of the process is to compare and eventually calibrate our judgments so that we move toward agreement about CCSS Quality.
Quality Review Steps for Individuals or Groups

**Step 1 - Review Materials**
- Record the grade and title of the lesson/unit on the recording form
- Scan to see what the lesson/unit contains and how it is organized
- Read key materials related to instruction, assessment and teacher guidance
- Study and measure the text(s) that serves as the centerpiece for the lesson/unit, analyzing text complexity, quality, scope, and relationship to instruction

**Step 2 - Apply Criteria in Dimension I: Alignment**
- Identify the grade-level CCSS that the lesson/unit targets
- Closely examine the materials through the “lens” of each criterion
- Individually check each criterion for which clear and substantial evidence is found
- Identify and record input on specific improvements that might be made to meet criteria or strengthen alignment
- Enter your rating 0 – 3 for Dimension I: Alignment

*Note: Dimension I is non-negotiable. In order for the review to continue, a rating of 2 or 3 is required. If the review is discontinued, consider general feedback that might be given to developers/teachers regarding next steps.*
Quality Review Steps for Individuals or Groups

Step 3 - Apply Criteria in Dimensions II – IV
- Closely examine the lesson/unit through the “lens” of each criterion
- Record comments on criteria met, improvements needed and then rate 0 – 3

When working in a group, individuals may choose to compare ratings after each dimension or delay conversation until each person has rated and recorded their input for the remaining Dimensions II – IV.

Step 4 - Apply an Overall Rating and Provide Summary Comments
- Review ratings for Dimensions I – IV adding/clarifying comments as needed
- Write summary comments for your overall rating on your recording sheet
- Total dimension ratings and record overall rating E, E/I, R, N – adjust as necessary

If working in a group, individuals should record their overall rating prior to conversation.

Step 5 - Compare Overall Ratings and Determine Next Steps
- Note the evidence cited to arrive at final ratings, summary comments and similarities and differences among raters. Recommend next steps for the lesson/unit and provide recommendations for improvement and/or ratings to developers/teachers.
State Examples

Developing lessons/units and providing feedback to developers/educators during and after the development process

- **Massachusetts:** Using rubrics and the quality review process to improve lessons and units. Currently prototype lessons are being piloted in classrooms. The state will continue to revise lessons and units using the quality review process and through examining student work from the piloting phase.

- **Maryland:** Developing and improving units using the rubrics and using the quality review process.

- **North Carolina:** Identifying expert teachers through application process to develop lessons using the rubrics. The lessons will be revised through quality review process and will be available online with videos of educators teaching the lessons.
State Examples cont.

Building Educator Capacity

- **Arizona**: Convening master educators and conducting trainings on the rubrics and the quality review process.

- **North Carolina**: Conducting regional trainings on the rubrics. During the trainings, educators practice applying the rubrics to their own lessons and discuss suggestions for improvement with other educators.

Other

- **New York**: Utilized rubric in RFP process with vendors

- **Oregon**: Utilizing the rubrics and other materials to review textbooks and provide textbook adoption alignment recommendations to districts.

- **Ohio**: Developing rubrics to evaluate lessons and units in social studies and science based on the EQuIP Rubrics.
Next Steps for EQuIP

- Building partnerships with several national organizations already in the process of developing instructional materials directly or with their members
- Holding webinars and virtual trainings for all EQuIP states to continue critical cross-state conversations
- Populating the EQuIP section of Achieve’s website with additional tools and training materials, including state developed training and support materials
- Sharing annotated “works in progress” at various score levels
- Hosting April cross-state convening
- Exploring jury and certification processes
- Bringing together EQuIP and OER work
Questions

Questions?

To download the rubrics, please visit http://www.achieve.org/EQuIP

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