MASSACHUSETTS
PERFORMANCE ASSESSMENT *for* LEADERS

Program Year 2025–2026

Candidate Assessment Handbook

dese MASSACHUSETTS Department of Elementary and Secondary Education

Table of Contents

Introduction

School leaders have the ability to create a school with equitable achievement goals and expectations, respectful and trusting relationships among the adults and the students, and effective programs and practices—a place where all students can attain academic knowledge and skills, understand and value self, understand and value others, and engage with the world so that they can be curious and creative, shape their path, feel connected, and be empowered.[1] Leaders base their work on their leadership knowledge; skills and dispositions; evidence and research; and the commitment of staff, families, and the community. Research clearly indicates that leaders who incorporate anti-racist practices into every aspect of their work yield benefits for **all** students. Furthermore, this work is critical for students from systematically underserved communities and groups.[2] To help ensure that school leaders are effective, all candidates seeking initial principal/assistant principal licensure in Massachusetts must meet state licensure assessment requirements.

To that end, the Commonwealth has supported the development and implementation of the Massachusetts Performance Assessment for Leaders (PAL). The PAL assessment system is designed to produce clear evidence of a candidate's readiness for full responsibility of an initial school leadership position. It is aligned with other Commonwealth leadership development efforts to prepare, support, and evaluate principals and assistant principals.

The system is also aligned with the Educator Licensure and Preparation Program Approval regulations (603 CMR 7.00), which were amended and approved by the Massachusetts Board of Elementary and Secondary Education on February 28, 2023.

Furthermore, PAL is aligned with the national performance assessment requirements of the [Educational Leadership Constituent Council (ELCC), as enumerated in its national accreditation program standards](#) and with the national educational leadership policy standards, the National Policy Board for Educational Administration's Professional Standards for Educational Leaders (PSEL), 2015.

Specifically, the four tasks that comprise the PAL system are aligned with the Board-

---

[1] [Educational Vision - Office of the Commissioner of Elementary and Secondary Education (mass.edu)](#)

[2] Additional resources can be found in the Guidelines, which reference the following: (1) Banks, J.A., et al. (2001). Center for Multicultural Education, College of Education, University of Washington; (2) Carver-Thomas, D. (2018). *Diversifying the teaching profession: How to recruit and retain teachers of color*. Learning Policy Institute. https://doi.org/10.54300/559.310; (3) Grissom, J.A., Egalite, A.J., & Lindsay, C.A. (2021). *How principals affect students and schools: A systematic synthesis of two decades of research.* The Wallace Foundation.

approved Professional Standards for Administrative Leadership. In addition, the tasks incorporate anti-racist leadership competencies that were added to the [Guidelines for the Preparation of Administrative Leaders](#) in 2021.

The revised Guidelines for the Preparation of Administrative Leaders are designed both to reflect recent research confirming the important role of school and district leaders and to disrupt historical patterns of racial inequity and promote success for all students. Anti-racist leadership competencies were added to the Guidelines to enable program completers to become anti-racist leaders who understand and embody anti-racist competencies, strategies, and mindsets. Anti-racist leadership helps ensure that each and every student can thrive in rigorous, culturally responsive, and culturally and linguistically sustaining learning environments supported by [high-quality curricular materials](#) and evidence-based practices.[3]

Current research and literature confirm the importance of school leaders to student success in PreK–12 schools. To achieve equity or to implement equitable practices, school leaders must ensure that all students receive high-quality curriculum and evidence-based instruction. Research demonstrates that student learning is accelerated when administrative leaders ensure that all students have access to high-quality, culturally responsive, and standards-aligned curricula and all educators are provided professional learning and support to implement those curricula (TNTP, The Opportunity Myth, 2018).[4] School leaders need to develop the skills to reflect on their actions, ideas, and assumptions to become effective in their roles. To encourage self-reflection, intentional equity pauses have been added at several junctions throughout each task.

---

[3] For an example of evidence-based practices, please see [Mass Literacy - Massachusetts Department of Elementary and Secondary Education](#).

[4] TNTP. (2018). *The opportunity myth: what students can show us about how school is letting them down—and how to fix it.* https://tntp.org/publication/the-opportunity-myth/

What Is an Intentional Equity Pause?

As you work on the four tasks, you will be presented with equity pauses for various components. Each pause includes several questions meant to prompt reflection on your actions and, just as importantly, the ideas and assumptions behind your actions.

Given the myriad responsibilities school leaders encounter each day, it is critical that they focus their attention consistently on closing opportunity gaps, improving well-being, and ensuring equitable learning outcomes for all students. One purpose of equity pauses is to help candidates understand how their attitudes, words, actions, and decisions impact teaching and learning by affecting all dimensions of school culture.

Furthering equity of opportunity in schools demonstrates a belief in the abilities of all students. By focusing attention on matters of equity, educators demonstrate that they are willing to confront challenges, improve their own practice, and make positive change in the lives of those they serve.

For a definition of the term *equity pause*, see page 63 in the following document published by the Massachusetts Department of Elementary and Secondary Education:

[Principal Induction and Mentoring Handbook (www.doe.mass.edu)](www.doe.mass.edu)

Definitions of terms related to culturally and linguistically sustaining practices, equity, and anti-racist competencies are included in the [glossary](). Candidates are encouraged to review these terms prior to beginning the PAL tasks.

Requirements for Principal Licensure Candidates

Effective September 1, 2014, the Commonwealth of Massachusetts has required all applicants for initial principal/assistant principal licensure to complete four Massachusetts Performance Assessment for Leaders (PAL) assessment tasks.[5] Applicants include individuals enrolled in leadership preparation programs and those pursuing licensure through the administrative apprenticeship/internship or panel review routes.

Candidates are required to register for and pay a fee to complete each PAL task.

Candidates are assessed according to the task instructions and rubrics in the *Candidate Assessment Handbook* **for the program year in which their work is submitted**. Annually, the PAL task instructions and rubrics will be reviewed for improvements, required changes, or updates, most often to improve clarity and provide guidance. Candidates are responsible for aligning their work products to the task instructions and rubrics in the current *Candidate Assessment Handbook* when they submit their initial tasks and when they submit retakes.

Submission and Score Considerations

- Task submissions accepted must meet performance expectations.
- All work products for the four tasks must be completed.
- Scores must meet state standards for licensure decision.
- Score reports will be released.

Overview of PAL Assessment Tasks

The Massachusetts Performance Assessment for Leaders (PAL) allows candidates to demonstrate their leadership knowledge and skills by setting the direction for improving equity in student learning, creating a professional learning culture among school staff, assessing and supporting individual educator instructional practices, and engaging families and community in improving student learning. The work for each task is to be undertaken in a school setting with guidance and direction from a supervising practitioner or school leader. Tasks can be completed as part of the principal candidates' coursework or fieldwork/internship experiences. Accomplishing the

---

[5] Please note that the Board of Elementary and Secondary Education approved a provisional license option for School Principal/Assistant School Principal (Levels: PreK–8 and 5–12). Please see the License Requirements Tool on the Department's website for requirements related to the provisional Principal/Assistant School Principal license: Licensure Requirements Tool (gateway.edu.state.ma.us)

following four specific tasks allows candidates to exhibit their leadership competency:

Task 1: Leadership through a Vision for High Student Achievement

Task 2: Instructional Leadership for a Professional Learning Culture

Task 3: Leadership in Observing, Assessing, and Supporting Individual Educator Effectiveness

Task 4: Leadership for Family Engagement and Community Involvement

These four tasks are intended to focus on student learning in a **priority academic area** for improvement in the school. A **priority academic area** is an area in which improved student performance is desired based on input from staff at the school and district levels and with attention to state- or federally designated student accountability groups or other groups that are a priority in the school. Candidates are required to provide evidence that demonstrates that the chosen subject or academic performance area and identified student group are priorities. For example, a candidate might designate the accessibility of fourth-grade multiplication skills for English Learners (EL) as a Task 1 priority academic area after carefully analyzing mathematics Massachusetts Comprehensive Assessment System (MCAS) data, as well as fourth-grade, first-term, common assessment data and school and district improvement plans, and consulting with the fourth-grade professional learning community (PLC) teachers.

> *A **priority academic area** is an area in which improved student performance is desired based on input from staff at the school and district levels and with attention to state- or federally designated student accountability groups or other groups that are a priority in the school.*

The priority academic area must be focused on specific academic subject-area learning with measurable student outcomes. Disproportionality in a broader range of school data (e.g., attendance data, behavior-related referrals, graduation or retention rates, Advanced Placement® [AP] enrollment) and operational concerns (e.g., budgetary and scheduling constraints) are important and may affect equity in the **priority academic area**. Although such factors should be part of candidates' root cause analysis, they should not be the primary focus when developing a vision for high student achievement (Task 1), creating a professional learning culture (Task 2), supporting educator effectiveness (Task 3), or promoting family engagement and community involvement (Task 4). As Figure 1 shows, the tasks are expected to overlap and be complementary, centered on a common **priority academic area**. Thus, optimally, a candidate will select

one **priority academic area** as the basis for completing all four tasks.

The Task 4 priority academic area can be either focused on a priority academic area or on health, emotional, and/or social needs that impact learning (see Task 4).

Professional Learning Culture	Family and Community Engagement
Educational Leader	
High Student Achievement	Individual Educator Effectiveness
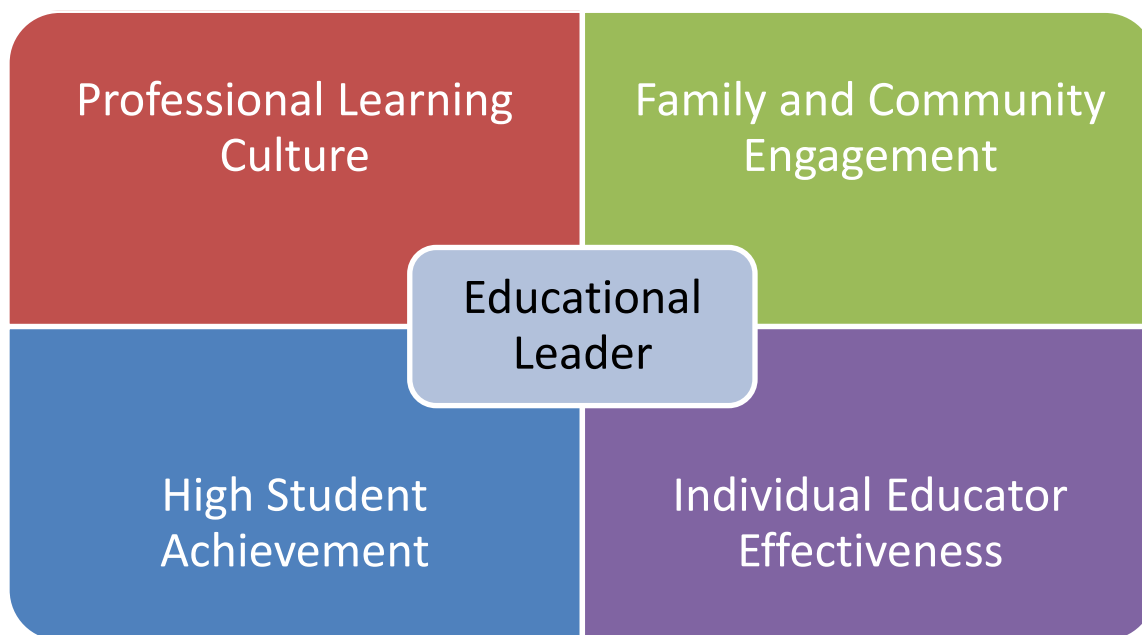
Figure 1. Relationship of the Four MA-PAL Tasks

Each task is designed to require leadership work with the goal of creating an equity-centered school. Such a school provides an environment where all students, **particularly members of state- or federally designated student accountability groups**[6] or other groups that are a priority locally, can improve their academic performance and reach ambitious learning targets. Although tasks can be completed independently, they are best undertaken as an integrated set of actions to improve student learning in a **priority academic area**. Candidates are required to provide evidence that demonstrates the chosen subject or performance area and identified student group are priorities.

As you select a priority academic area, consider the differences in student performance based on state- or federally designated student accountability groups (e.g., students

---

[6] State-designated student accountability groups include students who have been systematically marginalized or underserved by our education systems, including but not limited to those who identify as Black, Hispanic/Latino, Asian, Indigenous, or multiracial; students with disabilities; English Learners (EL); LGBTQIA+ students; students experiencing homelessness and/or financial insecurity; and students who are undocumented. Federally designated groups include students with disabilities; English Learners (EL); African American, Hispanic, and Native American students; economically disadvantaged students; and students performing below state proficiency levels.

with disabilities; English Learners [EL]; African American, Hispanic, and Native American students; low-income students; and students performing below state proficiency levels) or any additional groups that are a priority in your school.

As shown in Figure 2, we recommend that candidates begin with Task 1 to investigate a **priority academic area and any identified group(s) of students for whom support is needed to dismantle barriers to learning and improve outcomes**. Based on the identification of gaps and opportunities to improve student learning within this group, candidates develop an equitable, inclusive vision of high-quality student learning and plan for action strategies for improving student outcomes in a priority academic area. This priority academic area and plan are ideally, but not necessarily, the basis for engaging a group of educators to explore ways to improve student learning by working together as a professional learning group. The candidate's work to facilitate this learning group is the basis for Task 2. Observing and providing feedback to an individual educator as they work to effectively support student learning is the basis of candidates' activities for Task 3. Finally, for Task 4, candidates form a work group with family and/or community members to plan how to improve family and community engagement in relation to the **priority academic area** or to address related student health, emotional, or social needs that impact student learning. This must be connected to the **priority academic area** but may be broader than the candidates' focal area for professional learning and work.

Student priority academic area
Priority academic area (or related student need) for enhanced family and/or community engagement
Focal area of a professional learning group
Focal area of educator work
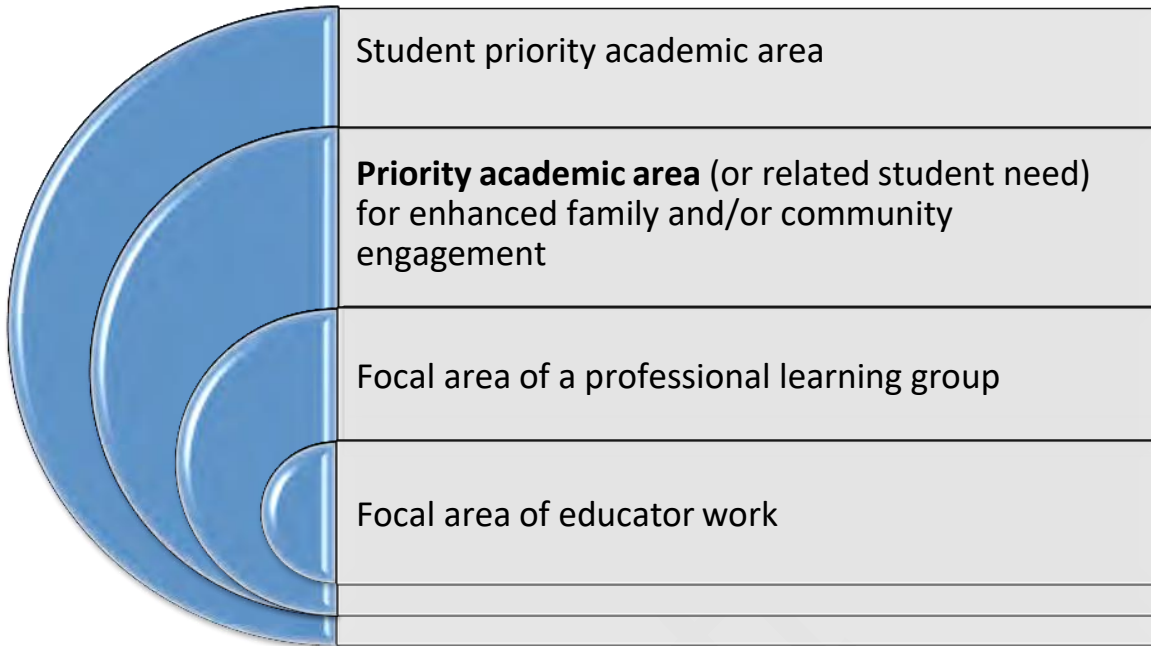
Figure 2. Nested Relationship of Priority Academic Areas

Each task is divided into four components of leadership action that reflect the cycle of leadership inquiry and learning, as shown in Figure 3.
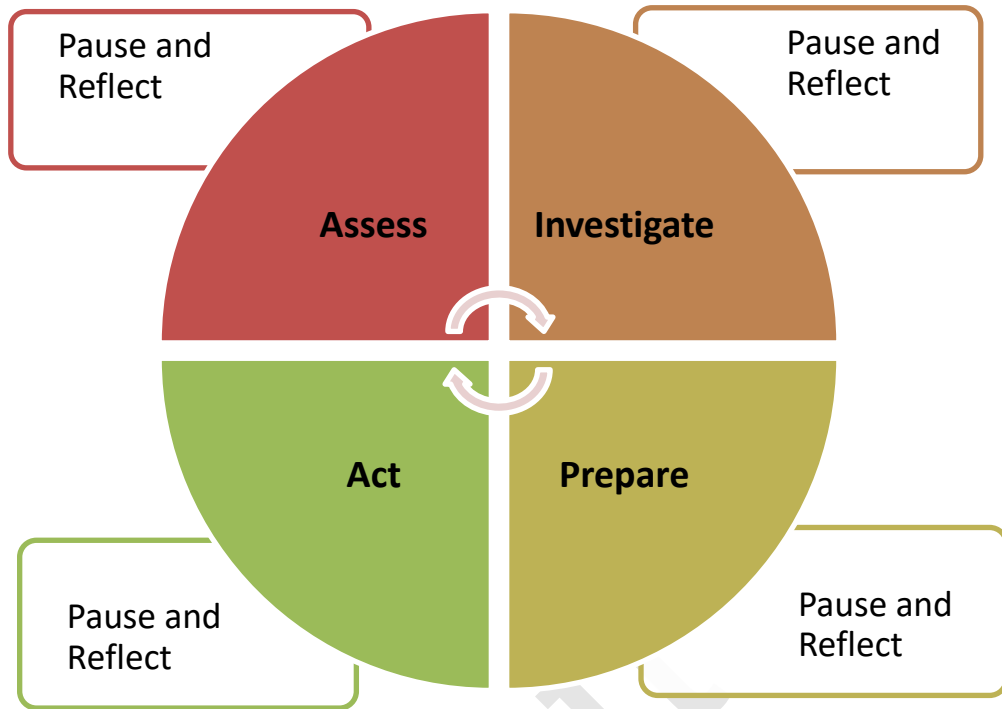
Figure 3. The Components of Leadership Action

PAL Work Product Submissions

All submitted work must be original <u>and in the candidate's own words</u>. If candidates collaborate on the implementation of the tasks, the corresponding submitted work MUST still be entirely in their own words. Each submitted task is screened for originality and will be flagged for administrative review if any overlapping content within submissions is found. See *Clarifying the Candidate's Role in the Performance Assessment* section below for more information.

For each task, candidates submit artifacts, supporting documents (by category), and a commentary as evidence of planning, implementing, and analyzing leadership practices and engagement of others in improving student learning. Considered part of the assessment for school leader licensure, all the work product submissions will be assessed by trained scorers who have educational leadership expertise.

At least three written artifacts and one commentary are to be submitted for each task. The instructions in each task section provide required word and page lengths. The word count guidelines reflect the fact that school leaders must be adept at preparing focused arguments, plans, and reports; their communications must be concise but well detailed.

Scorers are not required to read artifacts and commentary or view video submissions that exceed the requirements. Submissions that fall far short of the required word length (or minute length) are likely to lack sufficient information and detail, which would adversely affect how the scorers evaluate the work products and thus the candidate's potential score.

- Refer to the PAL Evidence Charts in each task section of this handbook for details regarding file formats, expected page lengths, video requirements, and other upload specifications.

- Review the PAL Submission Requirements and Condition Codes located at the end of this handbook. If your submission does not meet the Submission Requirements, a condition code may be applied during the scoring process instead of a numerical score. If a condition code is applied to any indicator or rubric, the entire task will be unscorable.

- Refer to the Condition Codes section in this handbook for a list of condition codes and reasons why they may be applied.

Clarifying the Candidate's Role in the Performance Assessment

The purpose of these tasks is to enable candidates to demonstrate **their** leadership skills and practices as evidence of their readiness for an initial school leader position. **Candidate submissions are reviewed for originality.** In preparing their submission, candidates must clearly explain their role and responsibilities. It is **critical to explain your role** in completing the tasks to ensure the authenticity of the work being submitted. In the event of any collaboration with other individual(s), be sure to identify any and all points of collaboration; include the rationale or purpose of the collaboration; clearly explain roles in the collaboration; and attest that your submissions, including written artifacts and commentary, **are entirely your own original products in your own words and not the products of others**. In the absence of any explanation, scorers will assume that the work was completed by others and the submission will not be scored. **Submissions are reviewed for originality.**

Please refer to the Rules of Assessment Participation 2.B.1. The Rules are found on the Candidates/Policies page of the program website.

Collaboration and Required Disclosure

Candidates can collaborate with others on the implementation of activities related to the tasks; however, each candidate **MUST** submit completely original work products, including written artifacts and commentary. **That means your submissions must be written by you entirely in your own words; your written submissions should have no overlap with your collaborators unless you are including written school or district policies or schoolwide or districtwide documents.** Each work product should clearly demonstrate individual thought and reflection and should not be identical to another candidate's submission, even when the work was done collaboratively.

As required in the Rules of Assessment Participation 2.B.1, be sure to identify any and all points of collaboration with any other individual(s), include the rationale or purpose of the collaboration, and clearly state your role in the collaboration and the role(s) of your collaborators. Provide appropriate attribution(s) so that scorers are able to differentiate your original work from the work of others. **Failure to submit entirely original work products as required in this section may result in disqualification of your submissions and the imposition of sanctions on your educator license(s).**

Accessing the PAL Assessment System

To access the PAL assessment system, candidates and preparation program faculty and staff can use www.ma-pal.nesinc.com. Within this website are instructions for candidates to create an account and register to submit task work products. The website also contains an Administrative Field Guide for Leadership Programs and additional resources for preparation programs and pathways.

Once registered in the Pearson system, candidates will have access to the ePortfolio to upload and manage their tasks.

The website also contains information on viewing scores.

Confidentiality

Candidates will have access to their own scores. Candidates will have access to their work products up until the time of submission.

Scorers will be screened and assigned to candidates who are not in their own districts or preparation programs to ensure candidate anonymity and confidentiality.

Preparation programs and pathways will receive summary information on candidate

task performance and ratings and total scores for individual candidates. They will not have access to candidates' submissions as evaluated by scorers.

Model consent forms for districts, educators, students, and their parents/guardians (necessary for Task 3) are available on the PAL website.

A sample Confidentiality, Anonymity, and Collaboration Form is available on the PAL website. An editable version is provided within the ePortfolio system. Candidates are required to complete and upload this form for each task.

Performance Standards

The Commissioner of Elementary and Secondary Education, based on the recommendations of the PAL Technical Advisory and Standards Setting committees, will establish the performance standards for PAL in Spring 2025. This section of the PAL Handbook will be updated once those standards are set.

Scores for tasks submitted prior to the operational release of the updated PAL in Fall 2025 will be valid for seven years. Those performance standards are as follows:

1) All completed work must yield a minimum threshold score of 2.1 (on a 4.0 scale) for each task. A threshold score is a minimum performance expectation for inclusion when determining the total score.

2) The performance standard for the four tasks is a candidate's total average score of all four tasks. Candidates must meet or exceed a passing score of 2.75 (on a 4.0 scale). The total PAL score is based on an average of the overall scores for each of four tasks and requires that at least some task-specific scores are higher than the threshold score. Candidates' work that only meets the threshold scores (2.1) for each of the four tasks will not obtain a passing score of 2.75 or above for the PAL assessment.

Task	Threshold Score per Task	Total Passing Score
Task 1	2.1	
Task 2	2.1	
Task 3	2.1	
Task 4	2.1	
Total		2.75

Evaluation Criteria

Measurement of the anti-racist leadership competencies is interwoven throughout the scoring rubrics. The evidence submitted will be judged according to five primary components of leadership practice for each candidate:

1) Setting direction for high student achievement

2) Creating a professional learning culture among staff

3) Supporting individual educator development

4) Engaging families and community in improving student learning

5) Analyzing leadership practices

Candidates provide evidence for the first four components of leadership practice when they complete the corresponding tasks and through the artifacts they produce and other relevant documents. Candidates provide evidence for analyzing leadership practices, the last component, in their commentaries.

Candidates' submitted work products are maintained confidentially and scored online by trained scorers using the rubrics that are presented at the end of each task section in this handbook. Candidates' scores are submitted to the Massachusetts Department of Elementary and Secondary Education (DESE) for principal licensure decisions.

Rubrics

The rubrics are used to score candidates' work. In preparing materials for submission, candidates are strongly encouraged to review the rubric expectations, including how equity is incorporated into the rubric indicators. Before submitting, candidates are strongly encouraged to evaluate their work using the rubrics.

Administrative Review

As stated in both the Performance Assessment for Leaders Rules of Assessment Participation as well as in Score Reporting Policies, it is imperative that candidates submit original work that does not mirror previously submitted work by other candidates. Submissions are identified for Administrative Review if screening indicates a

match of identical or similar language with other sources. Failure to submit original work will result in, at a minimum, voiding of your submission but may also include a waiting period before being able to submit additional tasks, or a letter of reprimand in your ELAR file and other potential licensure consequences.

Candidates are able to collaborate with peers on the implementation of activities related to any or all tasks, as long as the submitted task is written entirely in the candidate's own words. Please see the Collaboration and Required Disclosure section above to review how to frame your work when submitting for scoring.

Task 1

Leadership through a Vision for High Student Achievement

What Do School Leaders Need to Think about When Realizing a Vision for Equitable Achievement for All Students?

School leaders have the responsibility to create and cultivate a school environment where all students, particularly members of state- or federally designated student accountability groups, can attain academic knowledge and skills, understand themselves and others, develop a sense of belonging, and engage with the world. Central to the realization of a universally shared vision of high-quality student learning and success is the establishment of meaningful goals and expectations; respectful and trusting relationships among and between educators and students; and effective programs and practices based on both evidence and research and on the commitment of educators, families, and the community. Leaders must act to ensure that this vision is reflected in both the school's instructional program (curriculum, instruction, and assessment) and its culture.

> **For the purposes of PAL, school culture is defined as having three dimensions: (1) the professional learning culture (educator–educator relationships), (2) the student culture (educator–student and student–student relationships), and (3) the culture of family and community engagement (school staff, family, and community relationships). For a positive school culture that promotes learning, all three dimensions must be actively promoted and maintained, and all three are addressed in this task.**

Task 1 assesses the capacity of school leadership candidates to develop an equitable and inclusive vision of high-quality student learning and a plan for improving student outcomes in a **priority academic area**: a curricular subject or student performance area in which changes in practice, resources, or curricula are needed to address barriers that limit students' access to learning. A candidate can develop a vision and plan only after conducting a thorough analysis of a variety of data, including student academic performance data and input from school community members.

The priority academic area must be focused on specific academic subject-area learning with measurable student outcomes. Disproportionality in a broader range of school data (e.g., attendance data, behavior-related referrals, retention rates, AP® enrollment) and operational concerns (e.g., budgetary and scheduling constraints) is important and

may affect equity in the **priority academic area**. Although such factors should be part of the candidate's root cause analysis, they should not be the primary focus when developing a vision and plan.

Candidates must provide evidence to demonstrate why the chosen **priority academic area** is a priority. A candidate can identify the same or a similar **priority academic area** for Tasks 1, 2, 3, and/or 4, but for Task 4 you have the option to focus on student health, emotional, and/or social needs that impact student learning.

Candidates must also use evidence to identify one or more student groups who experience barriers to learning in the **priority academic area**. A student *group* can describe all students in a grade or content area or can be based on demographic attributes, designation as a state or federal student accountability group, or shared educational characteristics. For the purposes of this task, the group(s) identified by the candidate is called the ***student focal group(s)***. The goal of the candidate's vision and plan is to dismantle barriers facing the **student focal group(s)**.

> **Task 1 Example**
>
> **A candidate analyzes mathematics MCAS data and fourth-grade common assessments and determines that the percentage of students who are English Learners (EL) demonstrating proficiency in the multiplication of whole numbers is lower than the aggregate percentage for grade four. After reviewing school and district improvement plans and consulting with various school community members, the candidate identifies the following as their <u>priority academic area</u>:** *ensuring that instruction in fourth-grade multiplication skills is accessible for all students*. **The <u>student focal group</u> would be** *fourth-grade students who are English Learners (EL)*.
>
> **The candidate also identifies a lack of common planning time for fourth-grade teachers and English as a Second Language teachers as a barrier to learning for the student focal group. Although this concern requires further exploration and will likely be part of the candidate's plan, it is not to be identified as the priority academic area.**

To begin this task, you must collect and analyze relevant school-level student performance data as well as school context and culture data to identify (1) a **priority academic area** where barriers to equitable student learning exist and (2) a **student focal group or groups** whose academic success is impacted by those barriers. Then you will solicit additional information from students, educators, staff, families, and school community members to acquire explicit knowledge about the **priority academic area** and the student focal group(s). Consider the following:

- The school's context and culture

- Existing schoolwide practices and programs for supporting all students and evidence of fidelity in their implementation and effectiveness

- The ways in which the school experiences of students may differ, in particular for state- or federally designated student accountability group(s)

You should also review the Massachusetts [Guidelines for the Preparation of Administrative Leaders: Professional Standards and Indicators for Administrative Leadership](#).

In addition, you will be asked to **gather and evaluate input and feedback from school community members at two separate and distinct times during Task 1**. First, input should be gathered to help identify and justify the selected **priority academic area** and student focal group(s). This aspect of the data-gathering process should be completed prior to the development of the plan vision, strategies, or implementation details. After you have developed a plan, you will be asked to solicit feedback from school leaders and school community members regarding the plan's relevance, quality, and feasibility, as well as any suggestions for plan revisions.

What Do You Need to Do to Complete This Task?

- Collect, disaggregate, and analyze three to five years of quantitative student performance data (e.g., MCAS data, [literacy screeners](#), end-of-course assessments, standards-based assessments). Focus your analysis on identifying a priority academic area with disparate outcomes for different groups of students.

- Based on your analysis, identify the **priority academic area** where barriers to student learning exist and define the **student focal group(s)** for the task.

- Collect additional data related to assessment, curriculum, instruction, and school culture (e.g., school improvement plan, school programs and services, educators' years of experience/teaching assignments) to further define barriers impeding the learning and growth of all students in the **priority academic area**. Consider how these data may be indicative of biases in assessment methods and instruments, curricular resources, and instructional practices.

- Document existing school programs, services, and practices relevant to the student focal group's performance in the **priority academic area**; assess their effectiveness; identify gaps in equitable access to these programs, services, and practices; and describe opportunities for their improvement.

- Collect and analyze qualitative data (e.g., surveys, focus groups, school observations) to better understand the root causes affecting outcomes in the **priority academic**

area for the student focal group(s). Include input from a variety of school community members (e.g., students, parents/guardians, educators, school/district leaders) to ensure that the data collection reflects multiple perspectives.

■ Synthesize your analysis of the collected quantitative and qualitative data and develop a plan with specific goals and actions honoring students' strengths and addressing barriers to student learning, including historically systemic racial inequities. Include a vision statement (how the plan will improve educator effectiveness and support improved outcomes in the priority academic area for the student focal group), an evidence-based justification (how the plan reflects a close analysis of the collected data), and a theory of action (how the plan clarifies and addresses root causes of inequity present in the school context and culture).

■ Intentionally seek out viewpoints from all communities represented in the school about how your plan furthers learning in the **priority academic area** for the student focal group(s); engage participants in meaningful contributions.

■ Synthesize the feedback received from all stakeholders and make revisions to your plan that address barriers to student learning and achievement in the identified priority academic area.

■ Write a commentary that: (1) summarizes and constructively critiques the leadership skills and practices you used or developed in completing this task and (2) reflects on how systemic biases, structural inequities, and opportunity gaps affect your school/district, as well as the role of school leaders in confronting these barriers to support and sustain high-quality instruction and improved outcomes for all students.

What Questions Do You Need to Consider to Complete This Task?

■ What school and district data related to student performance, school context, and school culture are essential for identifying the **priority academic area** and student focal group(s)?

■ What additional school/district data are needed to deepen your understanding of the school experience of the student focal group(s) in the **priority academic area**?

■ How will you engage school community members in collaborative decision-making as you complete this task? What steps will you take to intentionally seek out viewpoints from all communities represented in the school, particularly systematically marginalized communities, regarding the barriers to student learning and achievement? How can you collect this information in a timely, inclusive, and equitable manner?

■ What sources of evidence make an argument compelling when advocating for changes that confront the root causes of barriers to learning for the student focal

group at the school?

- Are the actions and goals in the plan to increase equitable access to learning and improve outcomes for the student focal group in the **priority academic area** specific, measurable, rigorous, and realistic?

- Did you seek and receive feedback from all groups represented in the school community regarding the plan? Was the feedback constructive, or did it represent resistance to change? Do the revisions to the plan appropriately reflect this feedback?

- What did you learn about your leadership skills, the school, and the role of school leaders in advocating for change as a result of completing this task?

Each school has a unique set of attributes that defines its context, including grade span, size, staffing composition, resources, attrition rates, and the demographic characteristics of students and staff. Consider the elements of the school context that are relevant to the **priority academic area** and student focal group(s) you select and the plan you develop.

As you conduct work for Task 1, **intentional equity pauses** will be provided at several junctures to encourage your reflection. (See "What Is an Intentional Equity Pause?" in the Introduction.) The intentional equity pauses provide an opportunity for you to reflect on your own biases, identify barriers that impact student learning, and name ways that you can address systemic biases and promote racial equity.

Your investigation should progress through the inquiry and planning process illustrated in Figure 1.1.

Figure 1.1. Task 1 Inquiry and Planning Process

Select a priority academic area
What systemic barriers impede student learning?

↓

Identify one or more student focal group(s)
Which student group(s) experience significant barriers to learning in the priority academic area?

↓

Identify existing programs and services to support student learning
How do the supports meet student focal group(s) needs? In what ways are they not meeting these needs?

↓

Investigate the student learning experience in the priority academic area qualitatively
What systemic biases and inequities impede learning for the student focal group(s)?

↓

Develop a plan to increase equity and improve outcomes in the priority academic area
What actions are needed to remove barriers to learning for the student focal group(s)?

↓

Solicit feedback and revise plan
How will feedback be collected and from whom?

The Components of the Task

Component 1: Investigate

Task 1 begins with an investigation of **student outcome data** to identify priority academic areas where differences in outcomes between student groups are apparent. Next, **collect and analyze additional data and information** to deepen your understanding of teaching and learning and identify one **priority academic area** and one or more student focal groups as priorities. You can identify the same or a similar **priority academic area** for Tasks 1, 2, 3, and/or 4, but for Task 4 you have the option to focus on student health, emotional, and/or social needs that impact student learning.

As part of your investigation, pay particular attention to aspects of the educational program where barriers to equitable student learning may exist and where the school's approach to supporting students—through programs, services, and policies—is not meeting the needs of one or more student groups. For example, an independent research requirement may represent a barrier if students in one or more groups do not have access to high-speed internet outside of school. Academic support services provided in a school building outside of the school day are unlikely to meet the needs of all student groups if the families are not consulted regarding scheduling and information is not provided in all languages spoken in the school community.

Focus on the educational needs in the school and on the barriers to academic success that groups of students may experience. Give particular attention to students who are part of state- or federally designated student accountability groups, as well as to school data and local priorities. Consider using the inquiry tools and data-use strategies outlined in the [Massachusetts District Data Team Toolkit](#). They provide suggestions on using various types of data, engaging with others in data inquiry and planning, and using data for vision building and planning.

Before you begin your data collection and analysis, engage in critical reflection guided by the following question:

What are my preconceptions about how different groups of students learn in specific academic content areas?

Take time to reflect on how you view teaching and learning at the school, as well as your own identities, including but not limited to age, color, disability, national origin, race, religion, sex, gender identity, and sexual orientation. Also, consider intersectionality, the intersections of your personal identities. Do you perceive some academic content areas

as inherently more rigorous than others or more accessible? Do you perceive instruction in some content areas as free from structural inequity and in other areas as inherently biased? Do you perceive students in some groups as being necessarily advantaged or as automatically disadvantaged?

Once preconceptions and implicit biases are identified and considered critically, they are less likely to shape the interpretation of theoretically neutral data. However, **proactively ensuring** that you collect and review multiple sources of data reflecting the full diversity of the school community—for example, racial, ethnic, cultural, gender, gender identity, sexual orientation, linguistic, socioeconomic—remains essential.

Begin by **reviewing three to five years of available or newly collected student outcome data**. Although it is preferable to review more recent data, these data <u>must be no older than eight years</u>. Data may include, but are not limited to:

- the Massachusetts Comprehensive Assessment System (MCAS) or other standardized measures
- Early Literacy Universal Screening Assessments [approved by the Massachusetts Department of Elementary and Secondary Education](#) (e.g., DIBELS 8th Edition, EarlyBird, mCLASS)
- grade promotion rates
- end-of-course assessments
- course completion rates
- dropout rates
- standards-aligned assessments
- PSAT, SAT, ACT, and/or AP® scores
- graduation and college-going rates

In the review process, identify trends and patterns related to student academic success. Disaggregate the data to investigate patterns of differences between student groups in these trends, with special attention to the state- or federally designated student accountability groups as well as school demographic data and school or district priorities. In which priority academic areas are differences in student performance apparent? Which students experience the impact of these differences?

> [**Access Massachusetts school district data-collection and analysis tools**](#) **to assist in examining available qualitative and quantitative information.**

> **As part of the Massachusetts Model System for Educator Evaluation, the Commonwealth requires the use of student and staff feedback surveys, which may provide information that is relevant to this task (http://www.doe.mass.edu/lawsregs/603cmr35.html?section=07).**

Continue to **collect and analyze additional data related to teaching, assessment, and student learning and achievement** in the priority academic area or areas where potential equity gaps exist. Consider the following questions and the types of data suggested to guide you through this process.

1) *What formal or informal assessment results have been disaggregated and analyzed as part of this task? What does the analysis of these data reveal about existing barriers and gaps at your school regarding teaching and learning? How is student achievement adversely affected by the presence of barriers and gaps in the priority academic area(s)?*

Dive more deeply into the performance data you have already reviewed. The **priority academic area** should be the area in which differences in student outcomes represent the greatest equity challenge. Prioritize the students who appear to experience the most significant barriers in the **priority academic area**—the **student focal group(s)**.

2) *What is the relationship between outcomes in the **priority academic area** for the student focal group(s) and additional student, educator, and school data?*

To investigate this question, review available student engagement data (e.g., attendance and program participation rates) and educator quality and engagement data (e.g., years of teaching, qualifications, length of time at the school). How does this information help explain student outcomes for the **priority academic area**, particularly for the student focal group(s)? How does their relationship refine your understanding of the barriers experienced by the student focal group(s)?

3) *How do the **priority academic area** and student focal group(s) align with school and district priorities?*

Review the district and school's vision and mission statements and existing improvement plans. As you refine your understanding of the **priority academic area**, consider how it relates to the school and district priorities for school improvement.

Intentional Equity Pause

Pause and use the questions below to guide reflection, identify barriers, and name specifically how you can address systemic biases and promote racial equity.

What perceptions, assumptions, and biases exist about the student focal group(s) and their learning among the school's educators, all members of the school community, and members of the larger community's dominant demographic group?

Do any goals in the current school improvement plan address the learning of the student focal group(s)? Are there programs and supports in place to further their learning? What have been the results of these programs and supports?

Will identifying this group of students as the focus of your efforts result in consequences, intended or unintended, for the students? Will the impact on the student focal group(s) at this stage be positive or negative?

At the end of this phase, you should have identified a clearly defined, well-justified focus for an improvement plan: the **priority academic area** and student focal group(s).

Component 2: Prepare

Begin preparing a plan for confronting barriers to learning for the student focal group(s) in the **priority academic area** by gathering additional data, **analyzing root causes**, and **evaluating opportunities for improvement**. Review and analyze information regarding existing school programs, processes, and practices; seek input from school community members; and investigate possible improvement strategies.

Consider using strategies and resources from *Planning for Success* in Massachusetts, Massachusetts Office of Planning and Research's recommended strategic planning and continuous improvement process, which include tools for school or district self-assessment of strengths and areas for improvement; steps to explore root causes of inequities and barriers to student learning; and means of establishing goals, objectives, and strategic plans. The Equity Focus Lens tools in the Principal Induction and Mentoring Handbook will help you interrogate and reflect on the data you collect.

Below are the recommended preparation steps that you should take:

1) Collect and analyze additional data related to the learning experience for the student focal group(s) through school culture and climate surveys, observations in and around the school, classroom visits, and informal interviews, as well as focus group

discussions and additional surveys of students, educators, and school community members.

2) <u>Audit school programs, processes, and practices</u> that relate to the **priority academic area** (e.g., scheduling, teaching practices, academic intervention, team time, family participation, professional development opportunities) to identify structural inequities and systemic biases, as well as opportunities for improvement.

3) <u>Solicit further input</u> to determine the strengths, interests, and needs of all students—in particular the student focal group(s)—relative to outcomes in the **priority academic area** using surveys, interviews, focus groups, and observations from school leaders, educators, students, family members, and community members.

Intentional Equity Pause

Pause and use the questions below to guide reflection, identify barriers, and name specifically how you can address systemic biases and promote racial equity.

Are my data-collection strategies inclusive of all groups in the school community, including those whose experiences, beliefs, primary languages, and/or cultural norms may differ from my own?

What voices in the school community are represented/empowered in my data collection and analysis? What voices, including voices of currently and systematically underserved populations within the school community, are underrepresented, absent, or silenced?

How do the data I have collected further my understanding of the root causes of the barriers to learning for the student focal group(s)?

4) <u>Identify components of the school program that represent barriers to learning</u> for the student focal group(s). Limited adoption or the absence of culturally responsive, culturally and linguistically sustaining, identity-affirming, and anti-racist school practices may represent barriers to learning. In addition, identify those components that are working well and meeting the needs of all students. Consider all of the following:

   a. **Curriculum** (see the [Massachusetts Curriculum Frameworks](#), the District Curriculum Accommodation Plan, and the [Curriculum resources available](#) from DESE)

b. **Instruction** (see indicators of proficient and exemplary teaching in the [Massachusetts Model System for Educator Evaluation: Teacher Rubric](#)).

c. **Assessment** (formative and/or summative)[7].

d. **School culture** (e.g., student engagement, attendance, grade completion, course taking, and extracurricular activities; discipline practices; use of time, such as scheduling, grouping, and tiered instruction; additional school culture and student engagement improvement efforts; and family engagement; see additional indicators in [Ensuring A Positive School Culture and Climate Conducive to Learning: School Visit Protocol Supporting Standard II](#)).

Across Massachusetts, student populations are becoming increasingly diverse. Professional practices related to curriculum, instruction, assessment, and school culture in each district and school must meet the varied needs of every student and empower all students by affirming their racial, linguistic, and cultural identities.

As you consider practices at your school, explore the link below to learn more about definitions, examples, and resources related to *cultural responsiveness* and *culturally and linguistically sustaining practices*.

[Supporting Culturally and Linguistically Sustaining Practices—Center for Instructional Support](#) (www.doe.mass.edu)

---

5) <u>Explore possible improvement actions and goals</u> through evidence-based best practices sources and input from school community members that may be relevant for the **priority academic area** and student focal group(s), including but not limited to culturally responsive and culturally and linguistically sustaining practices.

Consider the nature of the school improvement planning process that currently exists in the school and what formal reporting is required. Determine how the possible improvement actions and goals might build on, contribute to, or be part of this planning.

Consider district, school, and community conditions—including systemic equity issues and ongoing efforts to address them—that contribute to the school's existing school improvement or strategic plan.

---

[7] The [Assessment Literacy Continuum (mass.edu)](#) is an example of an assessment that may be used.

Component 3: Act

Using the results from Component 2, **design and present a plan** including an integrated set of actions to confront barriers to learning and improve outcomes in the **priority academic area** for the student focal group(s). The plan should be built around a set of goals and measurable student objectives and a coherent **theory of action** that explains how implementing the plan will lead to increased access to learning and improved academic outcomes for the student focal group(s). It should reflect the school context and culture, as well as the scope and nature of the intended changes.

> **A theory of action is an explanatory map of how specific strategies (practices, programs, and/or policies) will improve specific outcomes (in this case, student learning) and why.**

The plan should include the core elements described in the [Massachusetts focused planning guide](#), which provides tools and resources for a planning process and examples of district plans.

Furthermore, it should include avenues to improve student outcomes by reducing barriers and increasing access to learning in one or more of the following:

- Curriculum
- Instruction
- Assessment
- School culture

As you develop your plan, **solicit input and guidance** from the leadership team and key members of the school community—including students, educators, family members, and community representatives. Document their ideas and recommendations, as well as the information they provide. This input should be formative to the planning process, addressing the scope and nature of the **priority academic area**, the needs of the student focal group(s), the strengths and limitations of existing programs and practices, and the potential for new evidence-based practices to confront systemic bias, increase equitable access to learning, and improve student outcomes.

The plan itself should be written as a compelling, evidence-based argument about how the proposed actions will increase access to learning and improve outcomes for the student focal group(s) in the priority academic area. In order to garner support from the school community, including the leadership team, the plan should include sufficient details about the following:

- A list of <u>goals and measurable objectives</u> related to student outcomes, including the scope and nature of the changes intended

- A set of <u>actions</u> to increase access to learning and improve student outcomes in the priority academic area that change, build on, or add to already existing programs and strategies

- A <u>theory of action</u> about how these actions will identify and interrogate structural inequities and systemic biases and will lead to greater increased access to learning and improved student outcomes, as well as fostering student engagement

- Identification of <u>existing resources and new resources</u> that the plan requires

- Changes in school <u>organization or structure</u> (e.g., common planning time, block scheduling, after-school and tutorial programs) for the proposed actions

- <u>Roles</u> and <u>lines of responsibility</u> for implementing each goal and action

- Steps to <u>engage staff</u> and <u>garner support</u> for each goal and action

- A <u>timeline</u> for the development and implementation of the plan

- Proposed <u>evaluation and feedback approaches</u> to determine whether the actions included in the plan yield the intended outcomes

The school principal or superintendent and the school leadership team should critically review the draft plan and provide feedback to you. Unlike the input previously obtained, this feedback is more summative and should address the plan's relevance, quality, comprehensiveness, and feasibility. Evaluate this feedback and use it to guide your revisions to improve the plan.

> **Each school has one or more leaders (principal, assistant principal, and educator leaders) and may also have a leadership team that represents the primary members of the school community. Any plan developed for improvement in the school requires their input and support or approval. These leaders in turn can provide critical feedback to strengthen a proposal for increasing equity and improving student outcomes.**

In addition, seek out input from all members of the school community, including students, parents/guardians, and/or community representatives who can bring an understanding of the school experience of students in the focal group(s) to their reviews. Evaluate this feedback and use it to guide your revisions to improve the plan.

The final version of your plan should be revised based on all the feedback you receive, with an explanation of how the feedback was used.

> **Intentional Equity Pause**
>
> **Pause and use the questions below to guide reflection, identify barriers, and name specifically how you can address systemic biases and promote racial equity.**
>
> *Would your plan challenge or reinforce existing assumptions and biases about the student focal group(s) and their learning? Could students in the group(s) be harmed in any way by your plan?*
>
> *If fully implemented, would your plan necessitate changes to staff members' daily schedules or responsibilities? How would you communicate these changes to staff? How might these changes be received by staff members?*
>
> *What consequences, intended and unintended, might result for the student focal group(s) from your plan's implementation?*

Component 4: Assess

As a final step, evaluate the leadership skills and practices you used in this task. Describe the nature of your support from school and district leadership in undertaking this task and how the support contributed to the process and the successful completion of the task. Your analysis should include specific examples of those leadership skills and practices and specific examples of what worked well and what could be improved to develop further as an instructional leader.

The leadership evaluation is not a recap of the steps you took to complete this task. It should specifically **address your leadership skills and practices** related to the following aspects of this task:

- Your collection and analysis of data to determine the **priority academic area** and student focal group(s), including your evaluation of the school program and identification of barriers to student learning.

- Your engagement of others in the planning process, including soliciting input during planning.

- Your development of a proposed vision, theory of action, and set of actions, including culturally and linguistically sustaining practices, to increase access to learning and improve student outcomes.

- Your planning and construction of a compelling argument to gain support for the proposed actions.

- Your presentation of the plan and solicitation of feedback from school leaders and

members of the school community.

- Your use of the feedback to make revisions and improve the plan.

Intentional Equity Pause

Pause and use the following questions to guide reflection, identify barriers, and name specifically how you can address systemic biases and promote racial equity.

Did your data collection and analysis lead you to new insights about potential barriers to equitable learning in the school culture and the educational program? How did these insights inform your plan? How will they inform your leadership skills and practices in your current role and in the future?

What approaches did you take to communicating with school community members whose experiences, beliefs, and/or primary languages differ from your own? Did you reflect on your own preferred style of communication and adjust to ensure that you were also working to address the preferred communication styles of others? Is input and feedback from all school community groups adequately represented in your plan?

Did your work result in dismantling biases and improving equity at the school? If so, how? Did any negative consequences emerge as you completed this task? What leadership strategies did you use when you confronted negative consequences resulting from your work?

Artifacts, Documents, and Commentary

This section provides instructions about the materials the school leadership candidate needs to submit for the review process:

■ Confidentiality, Anonymity, and Collaboration Form. An editable version is available within the ePortfolio system. You are required to complete and upload this form for each task.

■ Three artifacts.

■ Documents that support your artifacts.

■ Your commentary in narrative form, in response to a series of prompts, about the development of your leadership skills while completing this task.

> **Remember: Your artifacts must not include personally identifying information about you, the school staff, or the students. Your submissions must comply with the Family Educational Rights and Privacy Act (FERPA) (20 U.S.C. § 1232g; 34 CFR Part 99), a federal law that protects the privacy of student education records. Be sure to protect the anonymity of the participants in your study by using generic labels (e.g., Principal A, School B, Teacher C)—<u>not</u> aliases, pseudonyms, or first names—for the district, school, students, and staff, and all individuals.**

Artifacts

The artifacts that you submit for scoring, each in a separate file, are described below.

The artifacts submitted must represent authentic work completed by candidates and members of the working groups formed for three of the tasks. Listed below are descriptions of the artifacts required for Task 1.

Artifact 1: Priority Academic Area and Its Context

In a **memo** of up to three single-spaced pages (up to 1,500 words) to be written by you to the principal or superintendent, provide the following information:

■ <u>A description of a **priority academic area**</u> where barriers to student learning exist, with attention to one or more state- or federally designated student accountability groups as well as school data and school and district priorities.

■ <u>A compelling rationale, based on the data you collected and analyzed</u>, for selecting the **priority academic area** and the student focal group(s). The rationale for selecting the priority academic area and student focal group(s) should be grounded in your

reflections on systemic bias and issues of representation, should be aligned with school and/or district priorities and goals, and should draw on quantitative and qualitative data you present in this artifact. You should discuss your specific role in the collection and analysis of selected data, as well as the contributions of any individuals involved in this process. Draw clear connections between the data analyzed and the selection of the **priority academic area** and student focal group(s).

- An analysis of multiple sources of relevant quantitative and qualitative data (with appropriate references for each source) on student performance; student, educator, and school culture; and student engagement that includes:

  - An analysis of three to five years of quantitative academic performance data that are no older than eight years.

  - An analysis of relevant student engagement data (e.g., attendance and program participation rates) and educator quality and engagement data (e.g., years of teaching, years in the school, annual turnover, attendance, licensure, qualification, degrees earned).

  - An analysis of student and school culture drawing on various measures (e.g., student, educator, and stakeholder culture and climate surveys; focus groups; interviews).

  - An analysis of additional, relevant quantitative and qualitative data that clarifies possible reasons that barriers to learning exist within the **priority academic area** for the student focal group(s).

- Descriptions of the school and community contexts that influence student performance and engagement, with a particular focus on systemic biases that affect student groups and must be considered in developing your plan.

- A summary of structural inequities, gaps, utilization problems, and human and other resource limitations of existing school programs, services, and practices in relation to the priority academic area, drawing on the quantitative and qualitative data you present in this artifact as well as your analysis and reflections.

- How input was solicited throughout the planning process:

  - Identification (by role) of which individuals from the leadership team, staff, and members of the school community provided input during the planning process.

  - A description of how these individuals provided input and the nature of their input in terms of identifying the priority academic area and student focal group(s), assessing equity gaps and opportunities for improvement, and recommending improvement strategies.

- A description of your role in soliciting, analyzing, and utilizing input reflecting multiple perspectives from members of the school community.

> **Note: Synthesize the data used to define your priority academic area and the student focal group(s). Do not present tables of information without interpreting the data and drawing conclusions about your selection of the priority academic area and student focal group(s). Use tables of data judiciously to guide and inform readers. Tables may be displayed in the Category 1 or Category 4 documents (as defined below) and referenced in this artifact. It is acceptable to link to school and district information, but the artifact is expected to be your own work, not work already done by the school.**

Artifact 2: The Plan for Action Strategies

In a **memo** of up to four single-spaced pages (up to 2,000 words) to be written by you to the superintendent or principal, present a plan (the components of which are detailed below) that outlines a set of goals, objectives, and actions to increase equitable access to learning and improve outcomes in the **priority academic area** for the student focal group(s). Provide the following explanations and rationales for the plan:

- A vision statement describing how the plan confronts barriers to student learning and will support and sustain improved outcomes in the **priority academic area** for the student focal group(s).

- A compelling, evidence-based justification explaining how the plan responds to the school context and student culture, considers structural inequities and systemic biases, and addresses the needs of the student focal group(s) to improve outcomes.

- A theory of action describing how the plan's components collectively will address the root causes of barriers to student learning; lead to improved outcomes for all students, including the student focal group(s); and foster student engagement.

In addition, include the following components of the plan:

- Goals and measurable objectives specifying the improvements in student outcomes that will define success for the plan.

- A set of actions to increase access to learning and improve student outcomes in the priority academic area, including the implementation of culturally responsive and culturally and linguistically sustaining practices, with details about how each action will be taken.

- Existing resources used and new resources required.

- Changes in the school organization or structure (common planning time, block

scheduling, after-school programs, etc.) needed to support the proposed actions.

- <u>Roles and lines of responsibility</u> for the proposed actions and the implementation of new practices.

- Steps to <u>engage staff and garner support</u> for the proposed actions.

- A <u>timeline</u> specifying when the components of the plan will be implemented, as well as proposed <u>evaluation and feedback processes</u> that will be used to determine whether these strategies yield the intended outcomes.

- Clear identification of <u>your specific contributions</u> to the development of this plan and the contributions of individuals, group members, and/or relevant members of the school community.

Artifact 3: Findings, Feedback, and Recommendations

In a **report** of up to three single-spaced pages (up to 1,500 words), describe how you **collected feedback** from school leaders, the leadership team, and school community members about the proposed plan, and how you **synthesized and interpreted the feedback**. It is critical to include feedback collected in the planning phase and after the plan was developed and to describe the feedback beyond a surface level. The report should include the following information:

- Identification (by role) of which individuals from the leadership team, staff, and constituencies in the school community provided feedback on the proposed plan.

- Synthesis and interpretation of their feedback that includes the following information:

    - How comprehensive the plan is in its focus, theory of action, and proposed actions for addressing barriers to student learning and improving outcomes for the student focal group(s) in the **priority academic area**.

    - How relevant the proposed actions are for the following:

        - The school's priorities.

        - The **priority academic area**.

        - The identified needs of the student focal group(s).

        - The school culture, climate, and context, including structural inequities and systemic biases.

        - Alignment to existing school and district plans.

    - The quality and comprehensiveness of the proposed actions.

    - The feasibility of implementing the proposed plan.

- The potential impacts—positive and negative—of implementing the plan on the school, including for the student focal group(s).

- Suggested revisions based on the feedback.

- An **explanation of how the final plan was revised** to incorporate the feedback.

> **Note: All supporting documents, reports, and tables of data that are referenced in these artifacts must be included in the appropriate category of documents below and be appropriately cited.**

Documents by Category

Documents that must be submitted are supporting materials used by you and the working groups to complete the task. These documents provide supporting evidence pertaining to the task work and are necessary to inform scoring.

In addition to the artifact files described above, you must submit the following documents used in the task using a separate file for each of these five file categories:

- Category 1: Student demographic and other relevant school context and student performance information.

- Category 2: The school's existing vision, mission, and school improvement plan.

- Category 3: School and district priorities.

- Category 4: Data-collection forms (e.g., surveys, interview guides) used to gather additional information.

- Category 5: Forms (surveys or interview questions) used to collect feedback from the leadership team and school community members about relevance, quality, comprehensiveness, and feasibility of the proposed plan and a summary of the feedback data collected.

Commentary

You must submit a clearly presented and well-focused written commentary that explains how you accomplished the task. Your commentary should be grounded in the self-reflective work focused on addressing systemic biases and promoting racial equity that you completed throughout the task. This includes the critical reflection step in "Component 1: Investigate" and all of the intentional equity pauses throughout the task.

Write a personal commentary of up to two single-spaced pages (up to 1,000 words) on

your own learning and leadership development throughout this experience. Avoid simply recapping the steps you took to complete the task; rather, focus on analysis of your leadership for developing a vision of high-quality learning for all students and a plan for increasing equitable access to learning and improving student outcomes in a **priority academic area**. Base your analysis on the leadership skills you used in developing the plan and in soliciting and using feedback to revise it.

It is critical to include your own learning about your leadership skills and practices. Identify what worked well, what could be improved in your leadership skills and practices, and what adjustments you made to your leadership practices as you worked to complete this task. In addition, it is critical to include your reflections on the structural inequities and systemic biases you identified in the school, the district, and the system of education and the long-term changes that can confront those structural issues. Equally important, you must address the results of your own personal implicit bias reflections, being specific about those biases and how they inform your practice as a school leader.

The commentary should not be a description of your actions or a reiteration of the work accomplished, which is covered in other artifacts and documents. Rather, identify and describe the leadership skills you used during the course of the Task 1 project and your reflections on inequities and biases. Where applicable, provide examples of these leadership skills in action. Be sure to explain how your understanding of the school context and your leadership skills developed or changed as a result of your reflections during the course of the Task 1 project.

Specifically address your leadership skills and practices in response to the following questions about aspects of this task.

- What did you learn about the structural inequities and systemic biases that prevent students from accessing high-quality curriculum and instruction, educational opportunities, and outcomes? What programs, processes, and/or practices at your school represent barriers to equitable learning for all students? What insight did you gain into your own identities and preconceptions? How did your learning affect your leadership skills and practice?

- What leadership skills did you use to determine what data to collect and analyze to identify the **priority academic area** and student focal group(s)? What particular lessons did you learn that shaped your understanding of the school context and your leadership approach?

- What leadership skills did you use to engage members of the school community in the process of identifying the priority academic area and focal group, developing a

theory of action, determining goals and actions, and creating the plan? Describe any adjustments you made to your leadership practices throughout the task. How did your leadership skills change over time?

■ What leadership skills did you use to construct a compelling argument to gain support for the proposed plan and solicit feedback to improve the plan? What problems did you encounter, and what successes did you achieve?

■ What leadership skills did you use to gain input and guidance throughout the process and feedback on the draft plan? Whose perspectives were included, and whose were not? What would you do differently to increase engagement in the process? Include specific examples of what worked well and how you would improve your leadership skills for the future in developing a vision of high-quality student learning and a plan for improving student outcomes.

■ What feedback did you receive from school leaders, students, educators, parents/guardians, community members, and members of the school community regarding your leadership during Task 1, and how can you use this feedback to improve your leadership practices moving forward?

Task 1 PAL Evidence Chart

This chart provides a list of all required work products for **PAL Task 1**, as well as a description of supported file types for submission. Your PAL work products must conform to the artifact, document, category, and commentary specifications for each task. Candidates are required to submit all artifacts, commentary, and relevant documents **without any information** that would identify them (e.g., candidate name), their school or district, individual students, staff, and others who were part of task completion.

Note that your evidence cannot contain hyperlinks to required uploads. Any web content you wish to include as part of your evidence must be submitted as a document file, which must conform to the file type requirements listed below.

Please refer directly to the Artifacts, Documents, and Commentary section of Task 1 in this handbook for detailed requirements pertaining to the intent and content requirements of each file.

PAL Task 1 Evidence Chart Leadership through a Vision for High Student Achievement				
Part	**Work Product/Evidence**	**Specifications (if identified)**	**# of Files**	**Acceptable File Types**
Part A	Confidentiality, Anonymity, and Collaboration	Template provided	1	.doc; .docx; .odt; .pdf
Part B	Artifact 1—Priority Academic Area and Its Context	Max 3 single-spaced pages (no more than 1,500 words)	1	.doc; .docx; .odt; .pdf
Part C	Artifact 2—The Plan for Action Strategies	Max 4 single-spaced pages (no more than 2,000 words)	1	.doc; .docx; .odt; .pdf

PAL Task 1 Evidence Chart Leadership through a Vision for High Student Achievement				
Part D	Artifact 3—Findings, Feedback, and Recommendations	Max 3 single-spaced pages (no more than 1,500 words)	1	.doc; .docx; .odt; .pdf
Part E	Category Documents 1) School Context and Demographics 2) School Mission and Improvement Plan 3) School and District Priorities 4) Data-Collection Forms 5) Feedback	Separate file(s) for each of these 5 file categories	5	.doc; .docx; .odt; .pdf
Part F	Commentary	2 single-spaced pages (no more than 1,000 words)	1	.doc; .docx; .odt; .pdf
The maximum size for any individual file is 500 megabytes (MB). There is no limit on the number of MB uploaded for an entire task. The success of an upload through any application depends heavily on the type of network, the file size, and the network capacity at upload time.				

Note: Scorers are not required to read artifacts and commentary that either exceed or do not meet the requirements. Submissions that fall far short of the required word length are likely to lack sufficient information and detail, which would adversely affect how the scorers evaluate the work products and thus the candidate's potential score.

If any submitted materials do not meet the [Submission Requirements](#), a condition code may be applied during the scoring process instead of a numerical score. If a condition code is applied to **any indicator**, the entire task will be unscorable. If your complete submission, or portions thereof, cannot be scored due to failure to meet the Submission Requirements, no refund will be issued and no portion of your assessment fee can be applied to the cost of any future PAL registration or associated services.

Please consult the PAL website at www.ma-pal.nesinc.com to review the submission requirements, passing standards, and other policies related to submitting and scoring of PAL Tasks.

Submission Readiness

Scorers will be reviewing your submission to determine if you have complied with the PAL Submission Requirements located at the end of this handbook and on the Candidates/Policies page of the program website. If your submission does not meet the Submission Requirements, a condition code may be applied during the scoring process instead of a numerical score. If a condition code is applied to any indicator or rubric, the entire task will be unscorable.

Review the Task 1 Evidence Chart in the Task 1 section of this handbook and on the Candidates/Resources page of the program website to confirm your completion of all required work products and specifications.

Before submitting, have you:

- Appropriately **blinded your submission with all candidate, school, district, staff, student, family, and community member–identifying information removed**?

    Candidates are required to submit all artifacts, commentary, and relevant documents without any information that would identify them (e.g., candidate name), their school or district, individual students, staff, and others who were part of task completion. This includes screenshots, identifiable school logos and emblems, web addresses, URLs, and website graphics. Candidates must use generic labels (e.g., Principal A, School B, Teacher C, Teacher D) and **not** aliases, pseudonyms, or first names (e.g., Ms. Smith, Mr. Jones, Sally, Tom).

- Completed and uploaded the Confidentiality, Anonymity, and Collaboration Form for this task?

    To confirm that the work has been appropriately blinded, candidates must submit a completed Confidentiality, Anonymity, and Collaboration Form with each task submission, in which they confirm that they have **removed all personally identifying information (e.g., candidate name) and the names of their school, district, staff, and others**.

    The editable Confidentiality, Anonymity, and Collaboration Form is provided within the ePortfolio system. Candidates are required to **check the boxes** and upload this form for each task.

■ Addressed a ***priority academic area*** for the school?

   A **priority academic area** is an area in which improved student performance is desired, with input from staff at the school and district levels, and with attention to federally designated priority student groups or other groups that are a priority in the school.

■ Cited supporting documents?

   Candidates are to cite supporting documents, submitted for each task, in the relevant artifacts for the same task.

   Is the submission complete in that it contains all supporting documents in each category? Hyperlinks provided in lieu of required uploads are not permissible.

■ Clarified your role?

   Candidates must **explain their role** in completing the tasks to ensure the authenticity of the work being submitted.

   In addition, you must describe any and all points of collaboration with any other individual(s), include the rationale or purpose of the collaboration, and clearly state your role in the collaboration and the role(s) of your collaborators. Have you provided appropriate attribution(s) so that scorers are able to differentiate your original work from the work of others?

■ Demonstrated feedback collection and use of feedback evidence?

   Throughout the four tasks, candidates are asked to collect, analyze, and use feedback on plans, strategies, and collaborative work. In written submissions and supporting documents, candidates must demonstrate that feedback was collected; report on the number and roles of people interviewed, surveyed, or consulted; present analyses; and draw conclusions about the feedback. It is insufficient to present only the candidate's conclusions about feedback received.

■ Proofread all documents?

   Candidates are to proofread all documents before uploading to:

   • Remove all names of the **candidate, school, district, staff, student, and family and community member–identifying information**.

   • Correct spelling, grammar, and punctuation.

Candidates are strongly encouraged to compare each artifact against the instructions and rubrics before submission to ensure relevance and completeness.

After uploading into the ePortfolio system and before submitting, candidates are required to check their work to ensure that they do not upload duplicate artifacts and documents or blank files and that every file can be opened without error.

■ Prepared all documents by category?

Submitted documents should be specific to the task and discussed and referenced in the relevant artifact(s). Complete school report cards, school improvement plans, and school handbooks should not be uploaded as documents. Only relevant tables of information or plan and handbook excerpts should be uploaded as category documents and discussed and referenced in the appropriate artifacts.

Documents must be legible. Handwritten agendas and minutes, for example, must be readable.

■ Included an analysis of your leadership skills in the commentary?

The analysis of the candidate's leadership skills should be emphasized, regardless of whether the candidate feels the work on each task was successful. Include a description of how challenges were approached. Candidates should describe in detail, with specific examples, their leadership role throughout this task. Candidates should use the intentional equity pauses and reflect on their leadership strengths and areas for growth, taking into consideration feedback gathered from relevant school community members.

■ Reviewed the rubrics for this task?

Read the descriptions of each rubric in the next section. The rubrics will be used to score candidates' work. **Before submitting, candidates are strongly encouraged to evaluate their work using the rubrics.**

Task 1: Leadership through a Vision for High Student Achievement Rubrics

How Will the Evidence of Your Leadership Practice Be Assessed?

As you prepare your artifacts and commentary, use the following rubrics to guide your thinking, planning, action, analysis, and presentation.

While the intent is that your entire PAL submission is impacted by infusing your work as a school leader with the Anti-Racist Competences outlined in the Administrative Guidelines, four out of the six rubric indicators for Task 1 explicitly require evidence of your reflection and work involving equity issues: 1.a.3, 1.b.1, 1.b.3, and 1.c.1. For these four scores, if your submission does not show evidence as described by the bolded equity criteria, you will receive a lower score for that indicator. You cannot score higher for those four rubric indicators than your performance on the equity section of the score point descriptions, although you may score lower if the equity description is met but the other sections of the score point are not.

Rubric 1.a: Investigate and Prepare a Vision

MA Standard 1. Instructional Leadership: Promotes the learning and growth of all students and the success of all staff by cultivating a shared vision that makes effective teaching and learning the central focus of schooling.

> **How does the candidate gather and analyze data to identify a priority academic area and student focal group?**

The primary sources of evidence for Rubric 1.a are Artifact 1, Category Documents, and Commentary.

In addition to these primary sources, relevant information found in other parts of the submission may impact the score for each rubric.

	Beginning (1.00 to 2.09)	Developing (2.10 to 2.74)	Meeting (2.75 to 3.49)	Exceeding (3.50 to 4.00)
1.a.1: Data collection	Collects data on just one data element. Limits data collection to only one or two years. Does not collect information for one or more student groups or designate a student focal group.	Collects data on two or more elements. Makes a weak connection between the selection of the priority academic area and the data collected. Collects data for at least one quantitative and at least one qualitative element. Collects two or more years of data for at least one element. Collects data for at least one student group and selects a student focal group. Collects little or no data that clarify the student	Collects data on three or more elements. Makes a clear connection between the selection of the priority academic area and the data collected. Collects data for at least two quantitative or at least two qualitative elements. Collects three or more years of data for at least one data element. Collects data for two or more student groups and selects a student focal group. Collects some relevant data from educators and/or students about	Collects data on three or more elements. Generates a hypothesis about the learning issues impacting student focal groups in a priority academic area to guide data collection. Collects data for at least two quantitative AND at least two qualitative elements. Collects three or more years of data for at least one data element. Collects data for two or more student groups and selects at least one student focal group. Collects relevant data from

	Beginning (1.00 to 2.09)	Developing (2.10 to 2.74)	Meeting (2.75 to 3.49)	Exceeding (3.50 to 4.00)
		focal group's learning issues in the priority academic area.	performance and/or learning culture that help clarify some reasons for the student focal group's learning issues in the priority academic area.	stakeholders (students, educators, etc.) that clarify the reasons for the student focal group's learning issues in the priority academic area.
1.a.2: Data analysis and priority definition	Provides little or no analysis except to state the priority academic area or student group. Presents some data, with little to no connection to the priority academic area or student focal group.	Presents some analysis of the data collected, with a weak connection to the identified priority academic area and student focal group.	Presents a comprehensive analysis of data collected with a clear connection to identify the priority academic area and student focal group. Connects the data analysis and identification of the priority academic area and student focal group to school and district goals.	Analyzes, integrates, and interprets relevant data elements across multiple years to identify the priority academic area and student focal group. Generates a defensible hypothesis about how to improve student outcomes in a priority academic area, based on the data collected and analyzed. Makes a clear connection to existing school and district goals.

	Beginning (1.00 to 2.09)	Developing (2.10 to 2.74)	Meeting (2.75 to 3.49)	Exceeding (3.50 to 4.00)
1.a.3: Evaluation of existing policies, practices, and programs	**Does not consider existing policies, practices, and programs in describing the priority academic area and improving equity and student outcomes.**	**Identifies some existing policies, practices, and programs, with limited connection to the priority academic area and improving equity and student outcomes.**	**Evaluates relevant existing policies, practices, and programs, and identifies their strengths and challenges in relation to the priority academic area, including a gap analysis for the selected student focal group that addresses improving equity and student outcomes.**	Evaluates relevant existing policies, practices, and programs, and identifies their strengths and challenges in relation to the priority academic area, including a gap analysis for two or more student focal groups. **Generates a hypothesis about how changes could lead to improved equity and student outcomes for the selected student focal group in the priority academic area.**

Rubric 1.b: Design an Integrated Plan for Actions to Develop and Implement Improvement in the Priority Academic Area

MA Standard 1. Instructional Leadership: Promotes the learning and growth of all students and the success of all staff by cultivating a shared vision that makes effective teaching and learning the central focus of schooling.

MA Standard 2. Management and Operations: Promotes the learning and growth of all students and the success of all staff by ensuring a safe, efficient, and effective learning environment, using resources to implement appropriate curriculum, staffing, and scheduling.

How does the candidate design a vision and plan to improve student learning?

The primary sources of evidence for Rubric 1.b are Artifact 2 and Commentary.

In addition to these primary sources, relevant information found in other parts of the submission may impact the score for each rubric.

	Beginning (1.00 to 2.09)	Developing (2.10 to 2.74)	Meeting (2.75 to 3.49)	Exceeding (3.50 to 4.00)
1.b.1: Vision plan and focus	Presents no vision. Proposes one general goal with no student learning outcome-based objective(s). Generally describes an area of focus. Does not reflect the school context or school culture in the plan. **There is no connection between the plan and structural inequities, systemic biases, and gaps**	Presents a weakly articulated vision. Identifies at least one well-defined goal with specific student learning outcomes. Creates a plan focus that generally reflects the analyzed data, school context, and school culture. **There is little connection between the plan and structural inequities, systemic biases, and gaps**	Presents a vision, well-defined goal(s), and specific student learning outcomes. Makes clear connections between the data analysis and the vision, goals and objectives, and a plan focus that reflects school context and culture. **The vision, goals, objectives, and plan address structural inequities, systemic biases,**	Presents a coherent and compelling vision, with well-defined measurement-based goals and objectives rooted in student learning outcomes. Draws on the findings from the data analysis and explains how school context and culture are related to the vision, goals, and priorities. Presents a clearly articulated theory of action

	Beginning (1.00 to 2.09)	Developing (2.10 to 2.74)	Meeting (2.75 to 3.49)	Exceeding (3.50 to 4.00)
	and opportunities in existing school policies and practices.	**and opportunities in existing school policies and practices.**	**and gaps and opportunities in existing school policies and practices.**	that relates the vision, goals and objectives, and plan focus. **The vision, goals, objectives, and plan thoroughly address structural inequities, systemic biases, and gaps and opportunities in existing school policies and practices.**
1.b.2: Solicitation of input from school community members	Solicits no input from key school community members at any time during the planning process.	Solicits some input from some school community members that minimally helps inform the selection of actions to improve student outcomes.	Solicits input and guidance from relevant school community members that directly informs the selection of actions to improve student outcomes.	Solicits strategic input and guidance from relevant school community members (e.g., school leaders, students, parents/guardians, community members) that informs the selection of plan actions and their implementation details.
1.b.3: Plan details	Identifies one or two actions without sufficient details to implement. **Makes no connection between the actions and the desired student outcomes and equity issues.**	Describes one or two actions, along with responsibilities and resources, and some implementation details. **Makes limited connections between the plan actions and how they will improve student outcomes and address equity issues.** Makes little connection to	Describes two or more specific actions, along with concrete details about the responsibilities and resources required to implement them. **Explains how the actions relate to accomplish specific proposed student outcomes and address equity issues.**	Describes two or more specific actions with extensive details about the responsibilities and resources required to implement them. **Makes clear and coherent connections between the analysis of the data, school culture, equity issues, and how the plan's goals and**

	Beginning (1.00 to 2.09)	Developing (2.10 to 2.74)	Meeting (2.75 to 3.49)	Exceeding (3.50 to 4.00)
		the school context and culture.	Aligns the plan to school context and culture.	**actions relate to improved student outcomes.** Aligns the plan to school context and student culture and provides clear evidence of feasibility, including an assessment of potential consequences of implementation.

Rubric 1.c: Assess and Analyze Feedback from Participants

MA Standard 1. Instructional Leadership: Promotes the learning and growth of all students and the success of all staff by cultivating a shared vision that makes effective teaching and learning the central focus of schooling.

MA Standard 4. Professional Culture: Promotes success for all students by nurturing and sustaining a school culture of reflective practice, high expectations, and continuous learning for staff.

How does the candidate use feedback in analyzing and planning for the priority academic area?

The primary sources of evidence for Rubric 1.c are Artifact 3 and Commentary.

In addition to these primary sources, relevant information found in other parts of the submission may impact the score for each rubric.

	Beginning (1.00 to 2.09)	Developing (2.10 to 2.74)	Meeting (2.75 to 3.49)	Exceeding (3.50 to 4.00)
1.c.1: Plan feedback	Provides no evidence of collecting feedback on the plan. **Provides no evidence of feedback related to the plan's quality or relevance for improving equity and student outcomes in the priority academic area.** Provides no evidence of plan revision.	Attempts to collect some school leaders' feedback but provides minimal documentation in discussing the feedback. **Collects feedback that is minimally related to the plan's quality or relevance for improving equity and student outcomes in the priority academic area.** Shows little or no evidence of soliciting feedback to improve the plan that could lead to revisions.	Collects, analyzes, and interprets specific feedback from school leaders or educators on the quality and relevance of the plan for improving equity and student outcomes in the priority academic area. **Uses feedback to discuss school culture, climate, and context, including structural inequities and systemic biases.** Shows how leaders' or educators' feedback was	Collects, analyzes, and interprets detailed feedback from school leaders, educators, and other school community members on the quality and relevance of the plan for improving equity and student outcomes in the priority academic area. **Provides a thorough analysis of feedback to evaluate school culture, climate, and context, as well as structural inequities and systemic**

	Beginning (1.00 to 2.09)	Developing (2.10 to 2.74)	Meeting (2.75 to 3.49)	Exceeding (3.50 to 4.00)
			used to shape the final plan.	**biases.** Provides detailed evidence on how feedback was used to make specific revisions to the plan.
1.c.2: Assessment of leadership skills and practices	Discusses leadership in general, if at all, and with little attention to this task.	Conducts a general analysis of some leadership skills and practices used in completing this task without drawing on specific experiences. Recaps the steps taken in completing the task with little evaluation of their leadership skills.	Evaluates relevant leadership skills and practices needed to complete this task by drawing on specific experiences. Identifies what worked well and what they could have done differently. Identifies changes that could be made to improve their leadership skills in the future.	Evaluates relevant leadership skills and practices needed to complete this task, based on their experiences, and describes how they adjusted leadership practices throughout the task. Solicits feedback on their leadership skills from school community members involved in this task. Identifies what worked well and what they could have done differently and proposes specific steps to improve their practice.

Task 2

Instructional Leadership for a Professional Learning Culture

What Do School Leaders Need to Think about When Creating a Sustaining Professional Learning Culture through Professional Learning Groups?

Task 2 requires school leadership candidates to demonstrate how to foster school improvement by developing and supporting professional learning groups composed of educators in their school who reflect multiple perspectives. A candidate works with two to five educators as a professional learning group by engaging in structured learning activities with the goal of improving educator practice in a student **priority academic area**, a curricular subject or student performance area in which student learning needs are not being met or systemic barriers to student learning exist. Candidates are required to provide evidence that demonstrates the student **priority academic area** aligns with school and district plans and goals and takes account of existing differences in academic outcomes among student groups. A candidate can identify the same or a similar **priority academic area** for Tasks 1, 2, 3, and/or 4, but for Task 4 candidates have the option to focus on student health, emotional, and/or social needs that impact student learning.

The candidate facilitates the work of the group as they define a specific aspect of student learning within the larger **priority academic area** as their focus and define a professional learning goal. Working together, group members identify new curricula, instructional approaches, assessment procedures, student engagement strategies, and/or additional educator practices to explore as a group and try out individually. Group members then share their results collectively to improve one another's practice.

Task 2 assesses your capacity to create and facilitate a [professional learning culture](#) among a small group of educators over a designated period of time. Through this process, group members will build their cultural competency with the goal of improving learning outcomes for all students. Your aims as facilitator are to establish inclusive group-learning norms and practices; promote professional learning; and lead the group in exploring evidence-based, [culturally and linguistically sustaining](#) [curriculum](#), [instruction](#), and/or assessments. Using structured group-building[8] and group process activities, you will prepare, facilitate, support, and assess the group's collective learning

---

[8] Also known as *team building*.

and the learning of the individual educators in the group.

You will foster and facilitate an ongoing professional learning group by actively engaging interested educators in a collaborative process to determine and/or investigate a student **priority academic area** and a common instructional focus designed to improve educator practice in the selected **priority academic area**. This is not intended to be specific professional development in which a group of educators are passive recipients of information regarding a pre-determined topic.

Your work on this task should directly relate to the [Massachusetts Professional Standards and Indicators for Administrative Leadership](#). You may draw on [Massachusetts's recommended guidelines for school and district team data use and inquiry](#).

> **Schools have three interrelated cultures: professional culture, student culture, and the culture of family engagement and community involvement. This task focuses on developing an equity-based learning orientation within the school's professional culture to improve student learning.**
>
> **Consider the school's professional culture with respect to groups and group processes. Schools use different approaches to structure and support educators' work in groups. Some approaches are based on the organizational structure within the school, with groups formed within departments or within grade levels, while other approaches are ad hoc or informal. Some staff are trained in norms and practices and are supported under the group-learning models of "professional learning communities" or "communities of practice." Some do not receive training at all on how to be part of a learning group.**
>
> **The nature of the school's professional learning culture with respect to the use of groups to increase each educator's learning will bear on how new or existing groups of educators work on improving their instructional practice in the priority academic area.**
>
> **For additional information on professional learning groups, see the Massachusetts Tools for Schools [Professional Learning Communities Resource Modules](#).**

As you conduct work for Task 2, **intentional equity pauses** will be provided at several junctures to encourage your reflection. (See "[What Is an Intentional Equity Pause?](#)" in the Introduction.)

What Do You Need to Do to Complete This Task?

- Identify a student **priority academic area** for improvement in educator practice and begin to organize a group of educators for collective learning.

- Document relevant school context information, including student demographics, student academic performance data, and school and district goals and vision, as well as norms or practices within the school culture that may lead to inequities in the student **priority academic area**.

- Consider the nature of the current school culture for educator groups and group-based professional learning, the policies and structures (such as meeting time, space, and resources) that support professional learning, and how these factors would shape your group work. Describe any existing types of educator groups, their membership, and how they are used in the school.

- Identify and invite educators who reflect multiple perspectives to be members of a professional learning group related to the student **priority academic area** and provide a rationale for their inclusion. If assigned a group, explain how the group is to be engaged specifically around the student **priority academic area**.

- Work with this group to identify an area of focus within the student **priority academic area** for group learning and improving practice and to develop shared group norms and inclusive practices that value all members of the educator group.

- Engage in individual and group reflection activities to develop understanding of the identities, including intersectional identities; assumptions; and systemic biases that can affect school cultures, educator practice, and student learning.

- Collect evidence of the group members' roles in selecting the specific focus within the student **priority academic area** and of their learning activities, including information about the evidence-based curriculum, instruction, assessment, and engagement practices that group members explore and try out.

- Support individual educators with ongoing feedback as they try out new practices or take steps to improve existing instructional practices and share their experiences with the group.

- Collect evidence on new or improved educator practices that group members implement (individually or collectively) and analyze their initial impact on access to learning and student outcomes (e.g., student engagement, student work samples, student feedback).

■ Analyze your leadership practice in supporting the group's professional learning. Collect feedback from group members on their perceived effectiveness as a group, individual and group learning, improvement of practice, and their evaluation of your facilitation and support.
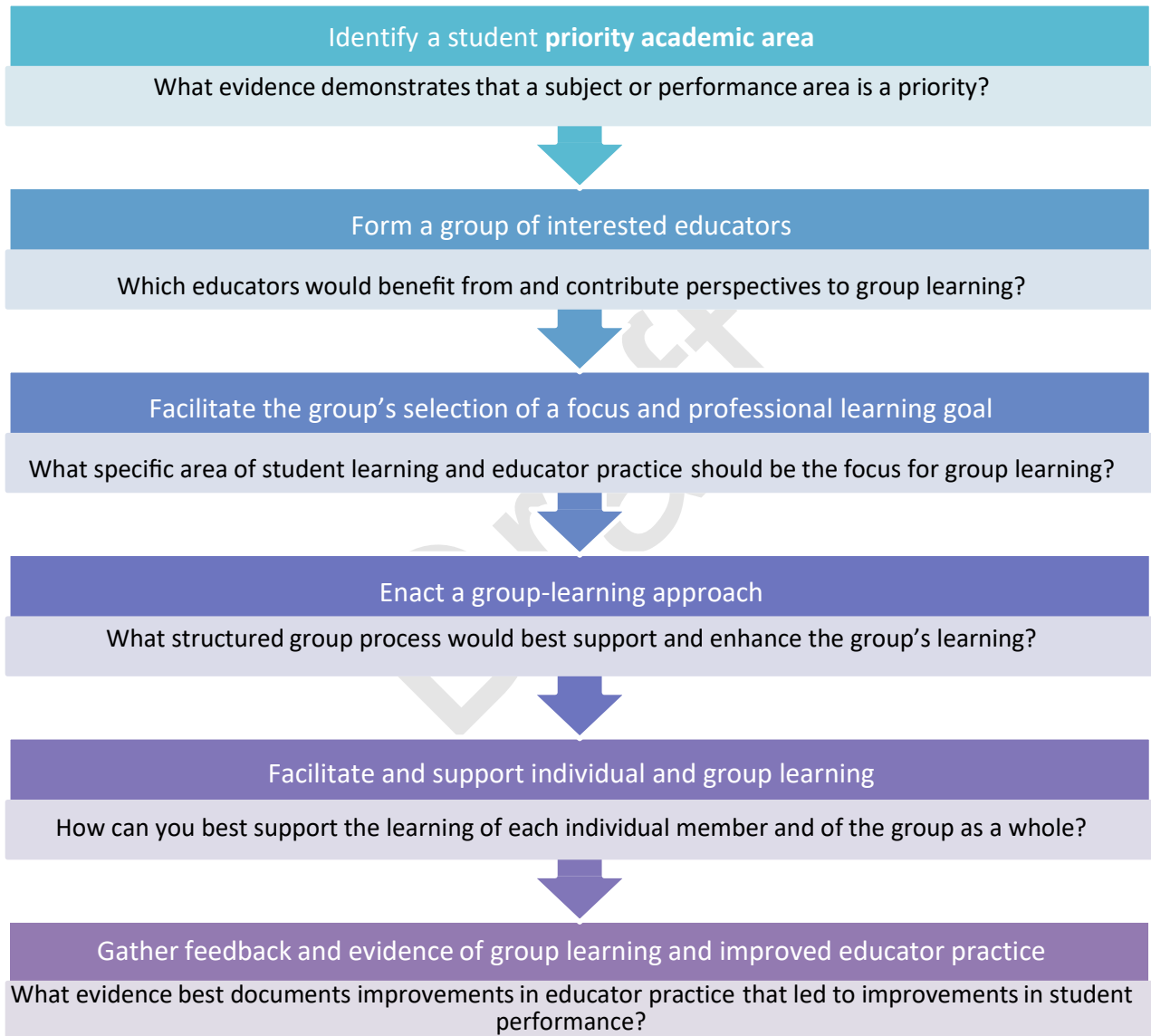
What Do You Need to Consider to Complete This Task?

■ Which priority academic area should be prioritized in the group's professional learning? Can improved educator practice in this area address unmet student learning needs and/or begin to dismantle systemic barriers that limit access to learning for some groups of students?

■ Does this priority academic area directly relate to a specific department/grade level, or does it relate to the work of educators from multiple departments and/or grade levels? How can you ensure the inclusion of multiple perspectives in the group?

■ Where does group-based professional learning fit into the school's culture? What norms exist regarding adult learning at the school? How will the group members establish inclusive, equitable norms for conducting collaborative learning?

■ What evidence-based adult learning activities will best support the group's professional growth while addressing individual or group assumptions? What will effective facilitation of these activities look like?

■ How will the group choose a common instructional focus within the priority academic area for study? How does the group's chosen focus relate to school context information, as well as district priorities? How does the focus disrupt potential barriers for students accessing the priority academic area?

■ How will the group choose which new or improved evidence-based, culturally and linguistically sustaining educator practices to pilot? How does the group think students will benefit from the newly implemented practices?

■ How will the group assess the actual impact on student performance of the newly implemented professional practices? What types of data will the group collect? Which of the group's findings may be of interest to all educators at the school?

■ How will you collect feedback from group members about your leadership and facilitation of group activities? What evidence do you need to assess the benefits of this professional learning experience for the educator group?

As you conduct work for Task 2, **intentional equity pauses** will be provided at several junctures to encourage your reflection. (See "[What Is an Intentional Equity Pause?](#)" in the Introduction.) The intentional equity pauses provide an opportunity for you to reflect on your own biases, identify barriers that impact student learning, and name ways that you can address systemic biases and promote racial equity.

The Components of the Task

The four components of this task require working with a group of educators and additional staff to address a student **priority academic area** through a group professional learning cycle as shown in Figure 2.1.

Figure 2.1. Task 2 Group Professional Learning Cycle

Identify a student **priority academic area**
What evidence demonstrates that a subject or performance area is a priority?

Form a group of interested educators
Which educators would benefit from and contribute perspectives to group learning?

Facilitate the group's selection of a focus and professional learning goal
What specific area of student learning and educator practice should be the focus for group learning?

Enact a group-learning approach
What structured group process would best support and enhance the group's learning?

Facilitate and support individual and group learning
How can you best support the learning of each individual member and of the group as a whole?

Gather feedback and evidence of group learning and improved educator practice
What evidence best documents improvements in educator practice that led to improvements in student performance?

Component 1: Investigate

Before you begin your investigation, engage in critical reflection guided by the following question:

What are my values and beliefs with regard to the students and educators in my school, the school context, and the historical role of schools and schooling in the United States in perpetuating systemic racism and inequity?

As you reflect, consider your own identities, including but not limited to age, color, disability, national origin, race, religion, sex, gender identity, and sexual orientation. Also, consider intersectionality, the intersections of your personal identities. How do your identities relate to and interact with identities in your school community and in the broader society? To what extent have assumptions and biases associated with the dominant culture shaped your practice as an educator and a leader? What steps can you take to dismantle assumptions and implicit biases—your own and those of members of the school community—and contribute to a school culture that is responsive to the needs of every student?

Identifying assumptions and implicit biases that may affect educator and leadership practice is a critical step in beginning your investigation. Throughout Task 2, continue to reflect on how educators can intentionally confront assumptions and biases to promote learning for all students and success for all educators.

Next, select a student **priority academic area** for this task by analyzing data to identify a student learning need where differences exist between the academic performance of specific student groups that might be attributed to systemic barriers to student learning. The student **priority academic area** should relate to school and district priorities, planning, and goals and take account of existing student group performance differences. You can identify the same or a similar **priority academic area** for Tasks 1, 2, and/or 3.

> **A student priority academic area should be based on student performance indicators for one or more student groups, considering in particular state- or federally designated student accountability groups, or groups that are a priority in your school.**

Identify the nature of existing educator groups (e.g., grade level, department, content area, special interest) in the school community. Then, with input from one or more school and educator leaders, select a group of two to five educators to form a professional working group that you will work with to improve educator practice, confront barriers to student learning, and improve outcomes in the student **priority academic area**.

> **Educators can increase equitable access to learning and improve student outcomes by focusing on and strengthening one or more areas of educator practice: their instructional content knowledge, their pedagogical practices, their understanding of student development and learning, and the integration of the relationship among these critical components into their practice.**

The educators can be part of an existing group or can make up a new group. While you should select educators who share one or more areas of practice (e.g., teaching a common grade or content area), it is important that the group reflect multiple **perspectives** (e.g., demographic diversity, different expertise within content areas or grade bands, different levels of professional experience with state- or federally designated student accountability groups). For example, you might select one educator who has taught at the school for more than ten years, one educator who has recently joined the faculty after teaching for several years in a district with a different demographic profile, and one educator in their first year of teaching.

> **Intentional Equity Pause**
>
> **Pause and use the questions below to guide reflection, identify barriers, and name specifically how you can address systemic biases and promote racial equity.**
>
> *Does the student priority academic area relate to the work of a broad range of educators at the school, or is it limited to specific departments and/or grade levels? How might this impact the diversity of perspectives within the group?*
>
> *Whose voices are you including in the group? Are any voices excluded? How might your colleagues at the school perceive the group and the member selection process?*
>
> *Are undue representational burdens placed on any members of the group because of their identities? Might this cause harm to the group members or to all members of the school community?*

Reach out to the educators you have selected and confirm their participation in the group. Determine their strengths, interests, and challenges related to the student **priority academic area** and assess their related prior knowledge and skills, their expectations for group learning, and relevant school and student cultural influences. In addition, arrange a meeting time (during or outside the school day) and schedule for a series of meetings to foster the professional learning of the group over time.

Finally, as part of getting started, determine together which group-learning approach to use (such as a professional learning community, community of practice, collaborative

action research, or other action-oriented learning approach). Develop a plan for how the group will establish norms, collaborate, share responsibilities, manage agendas and minutes, and use protocols to facilitate inquiry and learning. The plan must be culturally responsive and inclusive of the multiple perspectives reflected in the group, honor the strengths and challenges of individual group members, and respect the specific needs of each group member. For example, meeting schedules should respect the professional and personal obligations of group members.

> **Consider school-level conditions that hinder or foster opportunities for educators to work together on curriculum, instruction, and assessment; ways to establish a common planning time for this task; and how frequently the group can meet. Also, consider barriers within the school context that may inhibit some educators from participating fully in collaborative learning activities, as well as actions that can mitigate and begin to dismantle such barriers.**

Component 2: Prepare

Before the professional learning group can begin to work toward improvement in the student **priority academic area**, members must work together to establish norms for group learning. Establishing norms that are inclusive and culturally responsive, and that honor the backgrounds, identities, strengths, and challenges of each group member, is critical to ensuring an environment in which all group members are safe to share and contribute to learning. This process includes setting regular meeting times, having agendas and keeping minutes, assigning roles and responsibilities in the group-learning process, and using protocols and tools to facilitate inquiry and learning. All members of the group should contribute to and endorse the group-learning norms.

With shared norms in place, begin professional learning by engaging group members in critical reflection guided by the following questions:

What structural inequities may exist or be reflected in our educator practice and in our student learning environments?

In what ways do our identities, assumptions, and biases affect how we interact with our students and with colleagues?

To what extent may our identities, assumptions, and biases support or impede this group's learning?

> **Group reflection activities allow individuals in a group to clarify and share their own thinking about a topic, as well as to better understand the perspectives of individuals in the group. When a new group is formed, reflection activities help members develop common understandings, shared trust, and group norms. Engaging in these activities can also help members examine individual and group assumptions and give/receive authentic feedback.**
>
> **Consider incorporating reflective activities as part of all group meetings. In addition to facilitating activities, ask group members if they have reflective activities that they would like to lead with the group. Remember, the facilitator should not be expected to generate every idea or lead every activity for the group.**

Following these critical reflection activities, help group members deepen their understanding of the student **priority academic area** through a series of structured group meetings and identify a specific aspect of student learning as their <u>focus</u>. Work with group members to collect, analyze, and synthesize quantitative and qualitative data relevant to educator practice, including their own practice. The group's analysis should include, but not be limited to, curriculum materials, lesson plans, classroom observations, and formative and summative assessments, as well as data on student learning environments (e.g., classroom norms and expectations, student surveys, educator feedback to students, physical organization of classrooms, students' full learning profiles).

> **Consider the group members' individual and collective strengths, interests, and needs in relation to the priority academic area, drawing on relevant professional learning and adult development theory and research.**

Next, help the group identify a measurable professional learning goal that includes objectives for group learning and steps that each educator takes to build their cultural competency and improve their own practice. The goal should be designed around changes to educator practice that confront barriers to student learning by improving course content, instruction, or student engagement and support. The goal should increase students' access to learning and lead to improved student learning outcomes.

Consider a professional learning goal that enables group members to give constructive feedback to one another and proactively engage with new instructional practices for the priority academic area.

For example, the professional learning goal might include an objective for group members to share evidence-based, culturally and linguistically sustaining educator practices. Another objective might be for group members to learn from one another by

trying, monitoring, and collecting feedback on the effects of new or improved practices, particularly to support students with diverse assets and instructional or learning needs. As an extension of these objectives, identify the key ideas that the group members are developing and improvement strategies they are trying in their student learning environments, relating them to the school context and desired outcomes.

Intentional Equity Pause

Pause and use the questions below to guide reflection, identify barriers, and name specifically how you can address systemic biases and promote racial equity.

How does your facilitation ensure that the perspectives of each individual member are valued and that all members play active roles? Are leadership opportunities and responsibilities (e.g., taking minutes, planning meetings, researching topics) shared among all members?

What process did the group use to identify and adopt norms for this professional learning group? How did the group come to articulate a professional learning goal that each member could accept and work toward?

How does the group address differences between members regarding ideas and opinions? Does the group seek consensus? What is the facilitator's role in such situations?

Finally, determine what resources and supports you need to provide to the group members in order to foster learning during meetings. Determine how you will support group members' efforts to proactively engage with new and/or improved practices in each of their learning environments and to monitor and document the impacts on equitable student learning.

Component 3: Act

In the meetings, facilitate the work of the group members as they explore, change, and improve their educator practice and, in turn, confront barriers to student learning and improve student outcomes in the priority academic area. Use a collaborative learning process consisting of *preparing*, *acting*, and *assessing*. Expect that such collaboration will require at least three meetings over time.

Begin by leading the group in exploring evidence-based educator practices that are culturally responsive, culturally and linguistically sustaining, identity affirming, and anti-racist. Direct the group's learning toward identifying one or more new educator practices or improvements to existing practices that group members will implement, with the goal of increasing every student's access to learning and improving student outcomes in the focus area. Examples include the following:

- A new or revised <u>curricular unit</u> that reflects students' racial, ethnic, gender, sexual orientation, socioeconomic, and linguistic diversity (such as a unit related to <u>the Massachusetts Curriculum Frameworks</u>).

- A new or improved <u>instructional practice</u> (such as performance-based learning or culturally and linguistically sustaining literacy instruction embedded within a subject-matter curriculum found at <u>Mass Literacy—Massachusetts Department of Elementary and Secondary Education</u>).

- A new or improved assessment practice (such as formative and interim assessments aligned to the Massachusetts Curriculum Frameworks, a performance assessment that accounts for students' full learning profiles, or adjustments to instruction after a collaborative analysis of formative assessment data to increase equity in learning).

- New or revised student engagement strategies (such as identity-affirming approaches to differentiated instruction, culturally responsive communication, or positive student behavior supports).

> **Access the Center for Instructional Support's <u>Supporting Culturally and Linguistically Sustaining Practices</u> for information and resources.**

As the group identifies new educator practices and/or improvements to existing practices, work with group members to plan for implementing the practices. Ensure that group members have access to support and resources that will help them try out the new and improved practices between group meetings and document outcomes. Facilitate group analysis of each member's outcomes in order to monitor progress and make necessary adjustments to the new and/or improved practices.

> **Consider which aspects of changing practice are, or may be, the most difficult for educators to accomplish. Determine how to engage both the group as a whole and individual members, particularly educators who support students with specific learning needs (e.g., students with disabilities, students who are English Learners [EL], gifted and talented students).**

Your role as facilitator and support provider, which is critical to the group-learning process, includes the following:

- Ensuring that group members have access to resources related to evidence-based, culturally responsive, culturally and linguistically sustaining, identity-affirming, and anti-racist educator practices.

- Convening regular meetings for group members to prepare, implement, and assess their work.

- Ensuring that agendas and minutes are maintained.

- Coaching the group process, using learning protocols and tools, and reinforcing shared group-learning norms and anti-racist principles.

- Supporting individual and group reflection on how their identities, assumptions, and biases affect their ongoing work.

- Facilitating group learning through the full inquiry cycle (plan, act, monitor and assess, draw conclusions and implications).

- Facilitating problem solving.

- Documenting the work of the group, including exploration of new and improved practices, group-learning and reflection activities, and implementation experiences.

- Assisting in implementing and assessing new and improved educator practices.

- Providing support to individual group members as they try out new educator practices and/or work to improve existing practices.

- Maintaining the group's focus and energy.

- Assessing progress, including members' capacity to learn as a group, changes in educator practice, and impact on student access to learning and outcomes.

> **Intentional Equity Pause**
>
> **Pause and use the questions below to guide reflection, identify barriers, and name specifically how you can address systemic biases and promote racial equity.**
>
> *What are group members' expectations of you as a facilitator? Are their understandings and assumptions about the role different from your own? How can the differences be reconciled?*
>
> *Are the group's shared norms a good match for your facilitation style? What support is effective for group members as they make decisions, review evidence related to the professional goal, and give/receive feedback?*
>
> *How have group members conducted conversations? What does effective facilitation look like when group members are not in agreement? Are all voices in the group being heard? Has your facilitation caused harm in any way? What steps did you take to repair that harm?*

Throughout the group-learning process, continue to engage group members in reflection activities. Use these activities to guide group members in reflecting on their experiences implementing new or improved educator practices, as well as on how their identities, assumptions, and biases affect their ongoing work individually and the collective work of the group.

Component 4: Assess

Assess whether and how the educator practices of the group members change and improve through the group-learning process and their individual learning efforts. Describe your own and the members' roles in the group-learning process of *preparing*, *acting*, and *assessing*.

Through a feedback form or group discussion, ask the members to comment on and evaluate the group-learning process, the quality of the professional guidance and support they received from one another and from you, and what they believe changed in their knowledge and skills as a result of their exploration of evidence-based practices, tryout work, and individual and group reflections. The focus should be on what the group members learned about their own practices, the changes they adopted or used, and what they learned from these changes. Ask group members to comment on their participation in critical reflection and how group and individual reflections affected their understanding of systemic inequities in education and how they can address barriers to student learning. In addition, seek feedback from group members on their interest in further collaborative inquiry and the potential for sustaining the work of the group.

> **Intentional Equity Pause**
>
> **Pause and use the questions below to guide reflection, identify barriers, and name specifically how you can address systemic biases and promote racial equity.**
>
> *What is the group's assessment of its own learning? Are there improvements in practice that may be of interest to educators at the school outside of the group? How can you share those improvements appropriately?*
>
> *How did you decide which questions to ask as you solicited group members' feedback regarding your facilitation? Did your questions for group members encourage open responses and the sharing of perspectives?*
>
> *What group member feedback proved most useful to you? Did some feedback align with your own experiences with the group? Were you surprised by any of the feedback you received?*

Document the implementation of new or changed educator practices. Where possible, solicit group members' feedback on how changes in their practices affected access to learning in the student **priority academic area**, as well as their evidence of the impact, benefits, and challenges.

> **Consider how the group's professional learning activities enhance each member's professional growth and development related to improving instructional practices for better student performance. How can the members sustain their work individually or within the group and use their learning process as a foundation to build group and school capacity?**

In addition, analyze what you learned from the group-building and group-learning experiences and solicit feedback from the group members about your facilitation skills. Draw on theory, research, and best practices in leadership development, critical reflection, professional group building, and group learning, as well as on the role of interpersonal skills in group facilitation.

Finally, identify challenges and successes in facilitating group building and learning, including how you guided group members in critical reflection and enabled them to take responsibility in confronting systemic barriers to student learning and initiating change. As you develop a detailed analysis of leadership skills used to complete this task, include specific examples of those leadership skills and specific examples of what worked well and what could be improved. Focus your analysis on the steps you took to assemble a

team that reflected multiple perspectives; identify a student **priority academic area** and focus; promote a positive, inclusive, and productive group-learning environment; and provide support to the group as well as individual members. Avoid simply recapping the steps you took to complete the task; instead, focus on the **analysis of your leadership** in completing the task. Draw implications from this work for improving your group-building and group-learning facilitation skills for the future.

Artifacts, Documents, and Commentary

This section provides instructions for school leadership candidate submissions for the review process:

- Confidentiality, Anonymity, and Collaboration Form. An editable version is available within the ePortfolio system. You are required to complete and upload this form for each task.

- Your three artifacts.

- Documents that support your artifacts.

- Your commentary in narrative form in response to a series of prompts about the development of your leadership skills while completing this task.

Artifacts

The artifacts that you submit for scoring, each in a separate file, are described below.

The artifacts submitted must represent authentic work completed by candidates and members of the working groups formed for three of the tasks. Listed below are descriptions of the artifacts required for Task 2.

Artifact 1: Description of the Priority Academic Area and the Group

In a **memo** of up to two single-spaced pages (up to 1,000 words) written by you to the principal or superintendent, explain the academic priority focus area and the group of educators that will address it. Include the following specifically:

- A description of the student **priority academic area** you identified for group learning and the focus within this area that the group selected for its learning together. Explain how the group decided on its area of focus and how you facilitated a group decision to narrow its focus within the priority academic area. You should include

input received from the school's administrative team, the group's use of data, and how you considered competing priorities and demands. As part of this task, include the following information:

- An analysis and interpretation of <u>student demographic, academic performance, and other relevant data</u> on the importance of this student **priority academic area**, with reference sources provided as appropriate.

- An explanation of the <u>focus</u> that the group selected for its learning and improvement work (e.g., curriculum, instruction, assessment) as a means of addressing the student **priority academic area**.

- A brief explanation of the relationship between the focus and the school or district <u>priorities</u> and <u>practices</u>.

- An explanation of how <u>school context</u> and student, educator, and school <u>culture</u>—including, as appropriate, insights from individual and/or group reflection regarding identities, assumptions, and systemic biases within the school context—influenced the group's choice of focus and are being addressed through the professional learning process.

> **Note: Synthesize the data used to define the student priority academic area and the focus that your group selected. Do not present tables of information without interpretation and conclusions about the focus used for this task. Rather, use tables of data judiciously to guide and inform readers.**

- A description of the <u>group</u> selected for this task that includes a list of the members (by role, not by name) and the reasons for the inclusion of each, including how the selected educators reflect multiple perspectives.

- <u>Placement of the group</u> within the school context, including the following information:

  - An analysis of the role that group learning currently plays in the school's educator and student cultures and as a part of school improvement efforts.

  - Identification of the types of groups that already exist in the school.

  - Information on formal training on professional learning communities, group building, or group process and the nature of this training.

  - An explanation of how you obtained group members' commitment to participate, including their reasons for doing so.

  - A description of your role in facilitating the group formation and focus selection, including setting group norms and critical reflection on identities, assumptions, and systemic biases and inequities.

- A description of a culturally responsive, inclusive <u>plan</u> for how the group will work

together, share responsibilities, manage agendas and minutes, and use protocols to facilitate inquiry and learning.

Artifact 2: Description of the Group-Learning Experiences and Results

In a **report** of up to five single-spaced pages (up to 2,500 words) written by you to the principal or superintendent, provide a summary of what the group did during the course of its meetings. Specifically, include the following information:

- An explanation of how you supported the group's work over time, including how you garnered and structured time and resources to support the group's work. Include the following information:

  - How you secured and scheduled meeting time.
  - How you secured staff support to enable group work.
  - How you secured other resources to support group work and/or pilot evidence-based, culturally responsive, culturally and linguistically sustaining, identity-affirming, and anti-racist educator practices.
  - How you differentiated support for educators over time.

- An explanation of how you engaged educators in a group-learning process that enabled them to change their own educator practice in a manner that will positively influence equitable student learning and outcomes in the identified student **priority academic area**. Include the following elements:

  - A justification of how the selected evidence-based adult learning approach(es) supported group learning.
  - An explanation of how the approach will facilitate changes in practices for the focus area and lead to increased equity and improved student outcomes in the student **priority academic area**.
  - An explanation of how the group-learning approach is situated within the school's professional learning culture, history, and context.

- A description of the inclusive, culturally responsive group-learning norms that group members created and sustained to support their work together.

- A brief explanation of the nature of the group's learning and how the learning was structured that includes the following:

  - The schedule of meetings and a summary of the steps the group took to conduct its work.
  - A description of how protocols, group-learning norms, and/or other resources were used to support group learning during and between meetings.
  - A description of your role in facilitating an equitable, inclusive group process that honored group members' strengths, challenges, and perspectives and how group members shared responsibilities.

- A description of how you monitored the effectiveness of the group's exploration, identification, and implementation of a new or improved educator practice.
- A description of how you supported the collective work of the group, including ongoing group reflection activities.
- Evidence of what the educators have learned individually and collectively and how it connects to the focus area.

- A description of how you supported individuals within the group over time and the different types of support offered. Include the following:

  - What different or additional supports individual group members needed and why.
  - How you differentiated support for individual group members over time.
  - How successful you were in differentiating support for individual group members while honoring their backgrounds, identities, strengths, and challenges.

- A summary of the work that the group did to foster learning in the focus area and of the group's experiences in supporting one another's learning, including:

  - A review of the group members' exploration of evidence-based, culturally responsive, culturally and linguistically sustaining, and anti-racist educator practices.
  - The ideas and resources discussed during regular meetings and the learning activities.
  - A description of new and/or improved educator practices educators tried out between meetings.
  - A description of how the work relates to the focus within the student **priority academic area** and has been relevant for group members.

- A description of any member differences, conflicts, and/or other challenges that arose and how you and the group resolved them, including steps you took to reinforce group-learning norms and principles of equity and inclusion.

Artifact 3: Findings, Feedback, and Recommendations

In a **memo** of up to three single-spaced pages (up to 1,500 words) written by you to the principal or superintendent, provide an analysis of the group members' feedback on group learning, group task accomplishment(s), the group's receptivity to collaborative professional inquiry and critical reflection, and your facilitation role. Also provide evidence of the benefits of the work for improving educator practice, access to learning, and student outcomes. Specifically, include the following information:

- A summary identifying which group members (by role, not by name) provided feedback and briefly describing how you obtained feedback.

- An analysis and interpretation of group or group members' feedback that you collected about the following aspects of the task:

    - Their experiences learning together as a group over time.

    - Your group facilitation and support skills, including your effectiveness in employing inclusive strategies that honor each group member's strengths and challenges.

    - How differentiated feedback is connected to the student **priority academic area**.

    - The group's accomplishments, challenges, and implications for group members' educator practices, including how members' practices changed as a result of the group's work.

    - What group members learned from individual and group reflection and how members developed their capacity for critical reflection.

    - How group member disagreements or conflicts were addressed and how members learned to work to resolve differences.

    - Group members' perceptions of the potential for sustaining the group, as well as the group's receptivity for collaborative professional inquiry generally and changes in educator practice.

- An analysis of the evidence you collected related to the following aspects of the group's work:

    - Evidence of what group members learned individually and collectively.

    - How the work addressed the selected focus within the student **priority academic area**, and what group members explored, tried out, and learned individually and collectively.

    - Preliminary evidence of how group members' work is impacting student access to learning and outcomes in the student **priority academic area**.

- Recommendations for sustaining the group or the use of groups to foster a professional learning culture in the school, confront barriers to student learning, and improve student outcomes.

Note: All supporting documents, reports, and tables of data that are referenced in these artifacts must be included in the appropriate category of documents below and be appropriately cited.

Documents by Category

First, you must complete the Confidentiality, Anonymity, and Collaboration Form for each task and upload it as you submit your work products for Task 2. An editable version is available within the ePortfolio system. Candidates are required to complete and upload this form for each task.

Documents that must be submitted are supporting materials used by you and the working groups to complete the task. These documents provide supporting evidence pertaining to the task work and are necessary to inform scoring.

In addition to the artifact files described above, submit the following documents used in the task using a separate file for each of these six categories:

- Category 1: Background data and other information that define the **priority academic area** and focus selected.
- Category 2: A list of educator and/or staff groups existing in the school.
- Category 3: A list of the group-building and discussion group protocols you used to facilitate your group.
- Category 4: The agendas and minutes for all the group meetings.
- Category 5: Other materials that are relevant to the work that the group undertook, such as references for readings used in group meetings or samples of student work that were examined.
- Category 6: The group-learning feedback form and summary findings.

Commentary

You must submit a clearly presented and well-focused written commentary that explains how you accomplished the task. Your commentary should be grounded in the self-reflective work focused on addressing systemic biases and promoting racial equity that you completed throughout the task. This includes the critical reflection step in "Component 1: Investigate," the group reflection activities in "Component 2: Plan" and "Component 3: Act," and all of the intentional equity pauses throughout the task. You must address the results of your own personal implicit bias reflections, being specific about those biases and how they inform your practice as a school leader.

Write a **personal commentary** of up to two single-spaced pages (up to 1,000 words) on your own learning and leadership development through this experience. Avoid simply recapping the steps you took to complete the task; rather, focus on the analysis of your leadership for improving your own group-building and group-learning facilitation skills for the future. Base your analysis on the activities as well as on the feedback received from group members about your leadership and how it influenced their professional learning. Including your own learning about your leadership and ability to foster group learning is critical.

The commentary should not be a description of all of the actions you took to complete the task or a reiteration of the work accomplished, which has been covered in other artifacts and documents. Rather, identify and describe the leadership skills you used during the course of the Task 2 project. Where applicable, provide examples of these leadership skills in action. Be sure to reflect on the leadership skills you used and describe how your leadership skills developed or changed during the course of the Task 2 project.

Specifically address your leadership skills and practices in response to the following questions about aspects of this task:

■   What leadership skills did you use to build a professional learning community? What particular lessons did you learn that shaped your leadership approach?

■   How did critical reflection—both your own reflection and your facilitation of group reflection activities—affect your understanding of the assumptions, implicit biases, and systemic inequities that can impede student learning? How did critical reflection affect your leadership practice?

■   Describe any adjustments you made to your leadership practices throughout the task. How did your leadership skills change over time? Describe any adjustments you will make to your leadership practices in the future.

- How did you support the group in exploring evidence-based, culturally and linguistically sustaining educator practices? In what ways did you help the group members make progress in changing their practice for the designated focus area?

- What problems did you encounter and what successes did you achieve in facilitating group building and group learning? How did you handle conflict or group member differences? How did you enable educators to take greater responsibility in initiating their own learning and change? How did you honor the identities, strengths, and challenges of each group member and promote sustainability? What lessons have you learned to improve your ability to facilitate group learning in the future?

- What would you do differently to improve group effectiveness? Why would you take these new steps? Include specific examples of what worked well and how you would improve your leadership skills in facilitating a group-learning process for the future.

- Identify your successes and challenges as a leader in completing Task 2. Explain what you would have done differently, based on your experiences. Identify the implications for your future school leadership work, including acknowledging your strengths and areas for growth and proposing what skills and practices you need to improve to develop further as a school leader.

- What feedback did you receive from group members, school leaders, and all school community members (e.g., students, educators outside of the working group, parents/guardians, community representatives) regarding your leadership during Task 2, and how can you use this feedback to improve your leadership practices moving forward?

Task 2 PAL Evidence Chart

This chart provides a list of all required work products for PAL Task 2, as well as a description of supported file types for submission. Your PAL work products must conform to the artifact, document, category, and commentary specifications for each task. Candidates are required to submit all artifacts, commentary, and relevant documents without any information that would identify them (e.g., candidate name), their school or district, individual students, staff, and others who were part of task completion.

Note that your evidence cannot contain hyperlinks to required uploads. Any web content you wish to include as part of your evidence must be submitted as a document file, which must conform to the file type requirements listed below.

Please refer directly to the Artifacts, Documents, and Commentary section of Task 2 in this handbook for detailed requirements pertaining to the intent and content requirements of each file.

PAL Task 2 Evidence Chart Instructional Leadership for a Professional Learning Culture				
Part	**Work Product/Evidence**	**Specifications (if required)**	**# of Files**	**Acceptable File Types**
Part A	Confidentiality, Anonymity, and Collaboration	Template provided	1	.doc; .docx; .odt; .pdf
Part B	Artifact 1—Description of the Priority Academic Area and the Group	Max 2 single-spaced pages (no more than 1,000 words)	1	.doc; .docx; .odt; .pdf
Part C	Artifact 2—Description of the Group-Learning Experiences and Results	Max 5 single-spaced pages (no more than 2,500 words)	1	.doc; .docx; .odt; .pdf

PAL Task 2 Evidence Chart **Instructional Leadership for a Professional Learning Culture**				
Part D	Artifact 3—Findings, Feedback, and Recommendations	Max 3 single-spaced pages (no more than 1,500 words)	1	.doc; .docx; .odt; .pdf
Part E	Category Documents 1) Background Data 2) Teacher List 3) Protocols 4) Agenda and Minutes 5) Other Materials 6) Feedback and Summary	Separate file(s) for each of these 6 file categories	6	.doc; .docx; .odt; .pdf
Part F	Commentary	Max 2 single-spaced pages (no more than 1,000 words)	1	.doc; .docx; .odt; .pdf
The maximum size for any individual file is 500 megabytes (MB). There is no limit on the number of MB uploaded for an entire task. The success of an upload through any application depends heavily on the type of network, the file size, and the network capacity at upload time.				

Note: Scorers are not required to read artifacts and commentary that either exceed or do not meet the requirements. Submissions that fall far short of the required word length are likely to lack sufficient information and detail, which would adversely affect how the scorers evaluate the work products and thus the candidate's potential score.

If any submitted materials do not meet the [Submission Requirements](#), a condition code may be applied during the scoring process instead of a numerical score. If a condition code is applied to **any indicator**, the entire task will be unscorable. If your complete submission, or portions thereof, cannot be scored due to failure to meet Submission Requirements, no refund will be issued and no portion of your assessment fee can be applied to the cost of any future PAL registration or associated services.

Please consult the PAL website at www.ma-pal.nesinc.com to review submission requirements, passing standards, and other policies related to submitting and scoring of PAL tasks.

Submission Readiness

Scorers will be reviewing your submission to determine if you have complied with the PAL Submission Requirements located at the end of this handbook and on the Candidates/Policies page of the program website and included in this handbook. If your submission does not meet the Submission Requirements, a condition code may be applied during the scoring process instead of a numerical score. If a condition code is applied to any indicator or rubric, the entire task will be unscorable.

Review the Task 2 Evidence Chart located in the Task 2 section of this handbook and on the Candidates/Resources page of the program website to confirm your completion of all required work products and specifications.

Before submitting, have you:

- Appropriately **blinded your submission with all candidate-, school-, district-, staff-, and student-identifying information removed?**

  Candidates are required to submit all artifacts, commentary, and relevant documents without any information that would identify them (e.g., candidate name), their school or district, individual students, staff, and others who were part of task completion. This includes screenshots, identifiable school logos and emblems, web addresses, URLs, and website graphics. Candidates must use generic labels (e.g., Principal A, School B, Teacher C, Teacher D) and **not** aliases, pseudonyms, or first names (e.g., Ms. Smith, Mr. Jones, Sally, Tom).

- Completed and uploaded the Confidentiality, Anonymity, and Collaboration Form for this task?

  To confirm that the work has been appropriately blinded, candidates must submit a completed Confidentiality, Anonymity, and Collaboration Form with each task submission, in which they confirm that they have **removed all personally identifying information and the names of their school, district, staff, and others**.

  The editable Confidentiality, Anonymity, and Collaboration Form is provided within the ePortfolio system. Candidates are required to **check the boxes** and upload this form for each task.

- Addressed a *priority academic area* for the school?

  A **priority academic area** is an area in which improved student performance is desired, with input from staff at the school and district levels, and with attention to federally designated priority student groups or other groups that are a priority in the school.

- Cited supporting documents?

  Candidates are to cite supporting documents, submitted for each task, in the relevant artifacts for the same task.

  Is the submission complete in that it contains all supporting documents in each category? Hyperlinks provided in lieu of required uploads are not permissible.

- Clarified your role?

  Candidates must **explain their role** in completing the tasks to ensure the authenticity of the work being submitted.

  In addition, you must describe any and all points of collaboration with any other individual(s), include the rationale or purpose of the collaboration, and clearly state your role in the collaboration and the role(s) of your collaborators. Have you provided appropriate attribution(s) so that scorers are able to differentiate your original work from the work of others?

- Demonstrated feedback collection and use of feedback evidence?

  Throughout the four tasks, candidates are asked to collect, analyze, and use feedback on plans, strategies, and collaborative work. In written submissions and supporting documents, candidates must demonstrate that feedback was collected; report on the number and roles of people interviewed, surveyed, or consulted; present analyses; and draw conclusions about the feedback. It is insufficient to collect feedback on the candidate's leadership of the group.

- Proofread all documents?

  Candidates are to proofread all documents before uploading to:

  - Remove all names of the candidate, school, district, and staff and student-identifying information.
  - Correct spelling, grammar, and punctuation.

  Candidates are strongly encouraged to compare each artifact against the

instructions and rubrics before submission to ensure relevance and completeness.

After uploading into the PAL system and before submitting, candidates are required to check their work to ensure that they do not upload duplicate artifacts and documents or blank files and that every file can be opened without error.

■ Prepared all documents by category?

Submitted documents should be specific to the task and discussed and referenced in the relevant artifact(s). Complete school report cards, school improvement plans, and school handbooks should not be uploaded as documents. Only relevant tables of information or plan and handbook excerpts should be uploaded as category documents and discussed and referenced in the appropriate artifacts.

Documents must be legible. Handwritten agendas and minutes, for example, must be readable.

■ Included an analysis of your leadership skills in the commentary?

The analysis of the candidate's leadership skills should be emphasized, regardless of whether the candidate feels the work on each task was successful. Include a description of how challenges were approached. Candidates should describe in detail, with specific examples, their leadership role throughout this task. Candidates should use the intentional equity pauses and reflect on their leadership strengths and areas for growth, taking into consideration feedback gathered from relevant stakeholders.

■ Reviewed the rubrics for this task?

Read the descriptions of each rubric in the next section. The rubrics will be used to score candidates' work. **Before submitting, candidates are strongly encouraged to evaluate their work using the rubrics.**

Task 2: Instructional Leadership for a Professional Learning Culture through Professional Learning Groups Rubrics

How Will the Evidence of Your Leadership Practice Be Assessed?

As you prepare your artifacts and commentary, use the following rubrics to guide your thinking, planning, action, analysis, and presentation.

While the intent is that your entire PAL submission is impacted by infusing your work as a school leader with the Anti-Racist Competences outlined in the Administrative Guidelines, four out of the six rubric indicators for Task 2 explicitly require evidence of your reflection and work involving equity issues: 2.a.1, 2.b.1, 2.b.2, and 2.c.2. For these four scores, if your submission does not show evidence as described by the bolded equity criteria, you will receive a lower score for that indicator. You cannot score higher for those four rubric indicators than your performance on the equity section of the score point descriptions, although you may score lower if the equity description is met but the other sections of the score point are not.

Rubric 2.a: Plan to Facilitate Group Learning

MA Standard 1. Instructional Leadership: Promotes the learning and growth of all students and the success of all staff by cultivating a shared vision that makes effective teaching and learning the central focus of schooling.

MA Standard 4. Professional Culture: Promotes success for all students by nurturing and sustaining a school culture of reflective practice, high expectations, and continuous learning for staff.

How does the candidate plan for a professional learning culture to improve instructional practice and student learning?

The primary source of evidence for Rubric 2.a is Artifact 1.

In addition to this primary source, relevant information found in other parts of the submission may impact the score for each rubric.

	Beginning (1.00 to 2.09)	Developing (2.10 to 2.74)	Meeting (2.75 to 3.49)	Exceeding (3.50 to 4.00)
2.a.1: Group-learning plan	Does not identify a priority academic area or does not link a focus to student performance data. Provides limited information on school context for group learning. States an aim for group learning. **Does not propose a plan for group learning or has a plan that has few or no strategies to support group learning with no consideration of systemic**	Generally defines a priority academic area with limited use of student performance data and information on the school context and culture. Provides an aim to improve educators' instructional practice and a general plan for group learning. **Includes some attention to strategies to support group learning in the proposed plan, with limited consideration of systemic barriers affecting student**	Identifies a priority academic area that reflects student performance data for one or more student groups. Uses data to explain how the priority academic area and focus for improving educators' instructional practice is influenced by school context and culture. **Provides a goal and objectives for group learning based on the focus for the priority academic**	Identifies a priority academic area and focus that explicitly links to student performance data for one or more student groups. Uses data to explain how the priority academic area and focus for improving educators' instructional practice is influenced by school context and culture. **Provides a goal and measurable objectives for group learning that address**

	Beginning (1.00 to 2.09)	Developing (2.10 to 2.74)	Meeting (2.75 to 3.49)	Exceeding (3.50 to 4.00)
	barriers affecting student learning.	**learning.**	**area, including a consideration of systemic barriers affecting student learning.** Provides a plan with structure and process for group learning that reflects the group's understanding of systemic obstacles within the school context.	**the focus for the priority academic area as well as systemic barriers to student learning.** Has an evidence-based plan for group learning and a professional learning culture, with strategies, structure, and process that respect the identities, strengths, and needs of group members. **Links plan to school-level conditions, existing resources, school culture, broader school improvement strategies, and the group's understanding of systemic obstacles within the school context.**
2.a.2: Group identification and group formation	Does not identify a priority academic area or does not link a focus to student performance data. Provides limited information on school context for group learning. States an aim for group learning. Does not propose a plan for group learning or has a plan that has few or no	Selects two or more educators whose work is related to the priority academic area and who represent **multiple perspectives**. Forms the group for information sharing and professional learning. Develops a weak commitment among the group members to try out new instructional practices.	Selects two or more educators who represent **multiple perspectives** for a professional learning group with an interest in improving instructional practices in the priority academic area. Forms the group for professional learning with a clearly defined facilitation role. Develops a moderate	With school and leader input, engages two or more educators who represent **multiple perspectives** for a professional learning group, based on their individual and collective strengths clearly connected to the priority academic area and focus. Forms the group for professional learning with a clearly defined facilitation

	Beginning (1.00 to 2.09)	Developing (2.10 to 2.74)	Meeting (2.75 to 3.49)	Exceeding (3.50 to 4.00)
	strategies to support group learning. Identifies two or more educators with whom to work. Description of group composition provides no evidence of **multiple perspectives**. Informally forms a group, only for information sharing.		commitment among the group members to try out new instructional practices to improve student learning outcomes.	role and expectations for shared leadership. Develops a strong commitment among the group members to support each other in trying out new instructional educator practices to increase access to learning and improve student outcomes.

Rubric 2.b: Enact a Professional Learning Culture to Support Team Learning

MA Standard 1. Instructional Leadership: Promotes the learning and growth of all students and the success of all staff by cultivating a shared vision that makes effective teaching and learning the central focus of schooling.

MA Standard 4. Professional Culture: Promotes success for all students by nurturing and sustaining a school culture of reflective practice, high expectations, and continuous learning for staff.

How does the candidate support group learning?

The primary sources of evidence for Rubric 2.b are Artifact 2, Artifact 3, and Commentary.

In addition to these primary sources, relevant information found in other parts of the submission may impact the score for each rubric.

	Beginning (1.00 to 2.09)	Developing (2.10 to 2.74)	Meeting (2.75 to 3.49)	Exceeding (3.50 to 4.00)
2.b.1: Group process	Does little to facilitate group learning. Is a member of the group; facilitator role is unclear. **Does not help the group create and use learning norms or use inclusive, culturally responsive shared norms for working and decision making.** **Does not use culturally relevant and sustaining protocols or structured group-learning processes with the group to facilitate group learning.**	Facilitates the group with limited evidence on how the facilitation engages group learning or individual learning. **Establishes general group-learning norms with limited use of inclusive, culturally responsive shared norms for working and decision making.** **Uses culturally relevant and sustaining protocols or structured group-learning processes to a limited extent with the group to**	Consistently facilitates group learning related to the focus area. Has a clear role as the group's facilitator or organizer. **Generally establishes and uses inclusive, culturally responsive shared norms for working and decision making.** **Generally uses culturally relevant and sustaining protocols or structured group-learning processes with the group to facilitate group learning.**	Consistently facilitates group learning in the focus area and has a clear role as the group organizer and facilitator. Enables shared responsibility for facilitating group learning. **Thoroughly establishes and uses inclusive, culturally responsive shared norms for problem solving, resolving conflicts, monitoring, and eliciting feedback.** **Consistently uses culturally relevant and sustaining**

	Beginning (1.00 to 2.09)	Developing (2.10 to 2.74)	Meeting (2.75 to 3.49)	Exceeding (3.50 to 4.00)
	Does not hold group meetings over time.	**facilitate group learning**. Holds group meetings over a short time period, without sufficient time for a full inquiry cycle.	Provides support for individual educators to facilitate learning. Holds group meetings over time with sufficient time for a full inquiry cycle.	**protocols or structured group-learning processes and individual educator support strategies to facilitate learning in ways that respect the strengths and challenges of group members.** Holds group meetings over time with sufficient time for more than a full inquiry cycle. Differentiates support for individual educators within the group and one-on-one.
2.b.2: Group learning and work	Unsystematically shares information with others about practices. **Identifies generally what the educators learn individually and/or collectively with little to no exploration of evidence-based, culturally relevant and sustaining educator practices.** Provides at least some claims about how the educators' learning connects to the focus.	Directs educators with limited information and support for individual and collective work. **Describes in some detail what the educators learn individually and/or collectively with limited explorations of evidence-based, culturally relevant and sustaining educator practices.** Provides evidence on how the educators' learning connects to the focus.	Supports educators' ongoing individual and collective work. Employs different strategies, meetings, and other interventions to meet the diverse needs of each group member. **Provides clear evidence on what the educators have learned as a collaborative group, including explorations of evidence-based, culturally relevant and sustaining educator practices and how this learning connects to the focus area.**	Promotes and deepens educators' ongoing individual and collective work through cycles of preparing, acting, monitoring, assessing, and sharing. Enables educators to share and reflect on their individual learning experiences with the group. **Provides evidence on what the educators learn individually and collectively through the group-learning process, including in-depth exploration of evidence-based, culturally relevant**

	Beginning (1.00 to 2.09)	Developing (2.10 to 2.74)	Meeting (2.75 to 3.49)	Exceeding (3.50 to 4.00)
				and sustaining educator practices; the evidence is differentiated by educator need or interest and is connected to the focus.

Rubric 2.c: Assess Team Learning to Improve Ongoing Group Learning

MA Standard 4. Professional Culture: Promotes success for all students by nurturing and sustaining a school culture of reflective practice, high expectations, and continuous learning for staff.

How does the candidate assess progress and change pertaining to a group-learning task?

The primary sources of evidence for Rubric 2.c are Artifact 3 and Commentary.

In addition to these primary sources, relevant information found in other parts of the submission may impact the score for each rubric.

	Beginning (1.00 to 2.09)	Developing (2.10 to 2.74)	Meeting (2.75 to 3.49)	Exceeding (3.50 to 4.00)
2.c.1: Assessment of group process and group work	Describes own learning accomplishments, with limited attention to others' learning experiences.	Describes what group members tried out and/or what occurred in the group process, and the task accomplishments, drawing on group member feedback. Makes weak or no links between group process and group accomplishments.	Uses group member feedback and other data on how the group process facilitates the group's learning and task accomplishments (individually and collectively).	Uses analysis of group member feedback, documentation of practice, and other evidence to show how group learning and task accomplishments (individually and collectively) led to changes in educator practices. Provides evidence that the group developed capacity as an ongoing learning community. Draws on theory, research, and best practices in leadership development, professional group building, and learning.

| **2.c.2: Assessment of leadership skills and practices** | Discusses leadership in general, if at all, but not relative to this task. Does not evaluate relevant leadership skills.

Does not describe how systemic biases and inequities as well as their own implicit biases affected their leadership practice. | Conducts only a general analysis of some leadership skills and practices used in completing this task, without drawing on specific experiences.

Describes with limited specificity how systemic biases and inequities as well as their own implicit biases affected their leadership practice.

Recaps the steps taken in completing the task with little evaluation of their own leadership skills. | Draws on specific learning experiences to evaluate their leadership skills and practices relevant to this task.

Describes with some specificity how systemic biases and inequities as well as their own implicit biases affected their leadership practice.

Identifies what worked well and what they could have done differently.

Identifies changes that could be made to improve their leadership skills in the future. | Drawing on specific learning experiences, describes and evaluates the relevant leadership skills and practices used to complete the task.

Thoroughly describes how critical reflection on systemic biases and inequities as well as their own implicit biases affected their leadership practice and how they adjusted leadership practices throughout the task, providing specific examples.

Solicits and analyzes feedback on their leadership skills from educators involved in this task and utilizes this feedback to help identify what worked well and what they could have done differently.

Proposes specific steps to improve their practice. |
|---|---|---|---|---|

Task 3

Leadership in Observing, Assessing, and Supporting Individual Educator Effectiveness

What Do School Leaders Need to Think about When Improving Educator Effectiveness?

Effective school leaders ensure and understand that instructional practices in all settings reflect high expectations regarding content and quality of effort and work, engage all students, and are personalized to accommodate diverse learning styles, needs, interests, and levels of readiness. This includes understanding and recognizing the characteristics of high-quality teaching and providing a range of supports to help educators improve instruction and the outcomes of all students.

Task 3 assesses the ability of school leadership candidates to cultivate a shared vision that makes effective teaching and learning the central focus of schooling. This task requires candidates to demonstrate instructional leadership skills. Specifically, it assesses a candidate's ability to improve the educator's instructional practice and effectiveness while engaging in the following activities:

1) gathering and analyzing classroom data, including the educator's self-assessment (if available), student and educator work samples, and student outcome data (as relevant for the grade and subject);

2) visiting three or more classrooms to identify common school practices;

3) conducting a pre-observation meeting;

4) conducting at least two classroom observations and reviewing related instructional artifacts;

5) assessing the classroom observation and student performance data for instructional strengths and areas for improvement;

6) providing formative feedback to the educator; and

7) planning for professional support.

It is important for you to know about the educator's classroom context, differences in individual student performance relative to a **priority academic area**, the school and/or district classroom observation protocols, and research-based practices in classroom observation and educator development. A **priority academic area** is a subject or student learning area in which there is a need for improved student outcomes, as determined based on an analysis of data and input from staff at the school and district levels, and with attention to state- or federally designated student accountability groups or additional groups that are a priority in the school. Candidates are required to provide evidence that demonstrates the chosen priority academic area is a priority for district/school improvement efforts.

As an example, a candidate might select "engaging and supporting students to develop close reading skills" as a standards-based instructional focus for their Task 3 observation after a careful analysis of student performance data, school priorities, educator-identified areas for growth, and the observation of other classes. The following <u>are not</u> acceptable priority academic areas because they are not sufficiently focused on specific student learning performance and subject area: attendance, absenteeism, **discipline or behavioral issues**, graduation or **retention** rates, and AP® enrollment. Although these concerns may be secondary issues related to a priority academic area, they cannot be the primary focus when supporting educator effectiveness.

These actions build on [Massachusetts Professional Standards and Indicators for Administrative Leadership](#) and state and district guidelines for educator evaluation.

Unlike a formal observation for educator evaluation that examines all areas of an educator's practice, your observations will focus on a specific area of standards-aligned instructional practice within the **priority academic area**, enabling you to integrate information on curriculum, instruction, and student performance to understand an individual educator's content and pedagogical practices. While focused on a specific standards-aligned teaching area or practice, the observations and feedback should be guided by the descriptors of proficient and exemplary teaching in the [Massachusetts Model System for Educator Evaluation](#).

What Do You Need to Do to Complete This Task?

- Collect, analyze, and summarize classroom context information.

- Identify an instructional focus within a **priority academic area** (considering district, school, and educator team priorities, where possible).

- Select an educator to serve as a volunteer and select two or more of their class sessions for observation.

- Visit, at a minimum, three classes similar to the one selected for this task (as in a walk-through or instructional round process or other forms of brief, informal observational visits) and examine samples of student work and educator assignments for the **priority academic area** to learn about instructional practice that is common in the school.

- Conduct a pre-observation meeting with the educator to review pre-observation data (such as student test scores, classroom assessments, and performance tasks), instructional goals for the lesson and unit of study, common instructional practices, and the educator's instructional strengths and mutually agreed upon areas for improvement. Agree upon the areas of focus for the observation as defined by the joint analysis of information and the interests of the educator.

- Conduct two or more classroom observations; collect educator and student information, and sample artifacts associated with the lesson. Prepare a **continuous, unedited 15-minute video segment** drawn from one observation.

- Analyze the observed lesson using a school- or district-identified observation protocol and the [Massachusetts Model System for Educator Evaluation: Teacher Rubric](#).

- Identify the instructional strengths and one or more areas (but no more than three) for improvement from the observation. Areas of strength should be tied directly to the indicators of the identified observation tool. Gather information on available resources (such as professional development, instructional specialists, and peer-facilitated learning) to support the educator in improving instruction.

- Conduct at least one post-observation and feedback meeting with the educator. In this meeting, discuss and identify areas of strength and areas for improvement for the educator. Collectively create a plan for improvement and identify possible sources for professional learning. Prepare a **continuous, unedited 15-minute video segment** of this meeting.

- Elicit feedback from the observed educator to assess your instructional leadership skills in the pre-observation meeting, observation, and post-observation meeting and feedback.

What Questions Do You Need to Consider to Complete This Task?

- How have you engaged in self-reflection related your approach to observing, assessing, and providing feedback?

- What is your area of focus in curriculum and instruction? Why is this focus a priority for improving learning for all students and (if applicable) targeted student subgroups?

- Which educator will you observe and what can you learn about their teaching and students' learning prior to the classroom observation?

- What can you learn about current teaching practices in this focus area by observing educators in three or more similar classes and analyzing student work and performance data? Are there school- or district-adopted instructional practices that should be evident?

- What are the typical educator observation practices in the school and what protocols and rubrics are used to assess instructional practice and provide feedback?

- What are the school or district policies concerning video recording instruction? What consent forms are required, and what video recording considerations need to be considered?

- What additional student or educator information and artifacts are needed to inform your classroom observation and the feedback you provide to the educator?

- What professional supports are currently available for educators in the school after receiving feedback?

- What high-quality (specific, actionable, timely) feedback will reinforce effective evidence-based practices and culturally and linguistically sustaining practices?

- What school policies and practices are in place to support a culturally sustaining environment that honors students' and staff members' backgrounds, identities, strengths, and challenges?

> **Consider that effective teaching encompasses the following: subject matter knowledge, pedagogical skills, an understanding of child and adolescent development, student engagement practices, cultural responsiveness, and mastery of the ability to combine knowledge in all these areas to produce high-quality teaching and meaningful learning to meet diverse student needs.**
>
> **For the purposes of this task, high-quality teaching is defined by the descriptors of proficient and exemplary teaching in the Massachusetts Model System for Educator Evaluation: Teacher Rubric, including the meeting diverse student needs indicator, and student performance outcomes on state assessments and other measures.**

As you conduct work for Task 3, **intentional equity pauses** will be provided at several junctures to encourage your reflection. (See "What Is an Intentional Equity Pause?" in the Introduction.) The intentional equity pauses provide an opportunity for you to reflect on your own biases, identify barriers that impact student learning, and name ways that you can address systemic biases and promote racial equity.

Candidate Confidentiality Guidelines for Video Recording

Candidates are required to submit two video recordings as part of completing Task 3. Candidates must protect the confidentiality of individuals who are video recorded and adhere to district policies and procedures about appropriate permissions and consent. These guidelines address the recording, submittal, and use of videos prepared for the PAL task requirements.

Before Making Video Recordings

Before you record and submit your video recordings, you must do the following:

1) Review the Video Recording Permissions policy on the [Candidates/Policies](#) page of the program website. Model consent forms are provided on the [Candidates/Resources](#) page of the program website. Check with your preparation program and school district for other specific information that you may be required to include in the consent form.

2) Secure appropriate permission from the school district, parents/guardians, and guardians of students and from educators and additional adults who appear in the video recording. Keep the signed consent forms on file for your use if needed.

While Making Video Recordings

1) For both video recordings, use generic labels and general references (e.g., "the school," "the district") for the school or district to protect confidentiality. **Blind or remove all names on any typed or written material appearing in the video** (e.g., work products, commentaries, lesson plans, student work samples) that could identify individuals, including your name, or institutions. During video recording, use students' first names only. You may mute identifying information in the audio before submitting the video. However, your video submission must contain audio that is clear and loud enough for scorers to review.

2) For the classroom observation video, the educator must be visible, and there should be evidence that educator–student interaction is taking place (i.e., that students are present). Clear audio evidence is sufficient, and the video recording may capture students from the back; students' faces do not have to be visible in the video.

3) For the post-observation video, both you and the educator must be visible. Your video submission must contain audio that is clear and loud enough for scorers to review.

Before Submitting Video Recordings

The video and audio for the required video components must be intelligible to scorers. If your video clip(s) include audio in which the school and/or district is identified or in which students and/or members of the faculty, staff, or administration are personally identified by last name, and you wish to mute this audio to remove the personally identifiable information, this is acceptable. Please note, however, that you may be assigned a condition code to one or more indicators if your video contains no audio, or if the audio associated with your video is of insufficient quality or volume for scorers to review.

If the educator observation video contains instruction delivered in a language other than English, a translation is required. The translation should be appended to Task 3 Artifact 1 (Pre-Observation Template). All primary dialogue (relevant, direct, i.e., not background chatter) from both educator and students should be translated. There is no page limit for required translations into English. If a translation is not provided, a condition code will be applied.

Storage and Use of Video Recordings

To protect the privacy of all individuals who appear in the video recording:

You MAY

- Store/upload your video recording in the PAL ePortfolio system.

You may NOT

- Display the video publicly (e.g., personal websites, YouTube®, Facebook®).
- Post video recordings in any location other than the Pearson ePortfolio system.

The Components of the Task

Your investigation should progress through the inquiry process illustrated in Figure 3.1.

Figure 3.1 Task 3 Providing Observation Feedback and Support for an Individual Educator

Select a priority academic area and educator to observe
What priority academic area will be your focus for the classroom observation and which educator will you observe?

⬇

Visit several classes to identify schoolwide and/or common instructional practices
What are schoolwide common practices that educators employ for the priority academic area and how do they vary across classrooms?

⬇

Learn about the educator, students, and units of study
What information about the educator, students in the class, and unit of study do you need to understand the lesson you will observe and what the educator wants to learn?

⬇

Conduct pre-observation
How will you facilitate a two-way discussion with the educator in preparation for the observation?

⬇

Observe and video record two or more classes	
What are the school's policies on video recording an educator observation?	What educator observation protocol or rubric will you use, and how will you focus on effective teaching practices?

⬇

Conduct post-observation conference	
How will you develop rapport and engage in a two-way discussion with the educator?	What observed teaching practices will you address, and what improvements will you recommend? What supports?

⬇

Elicit feedback on observation and support provided
What feedback will you seek and how? What supports?

Component 1: Investigate

Begin with a **priority academic area**, such as the area selected for Task 1 or in Task 2. Based on student performance and other relevant evidence, as well as school and district goals and priorities, choose one or more instructional focus areas within the **priority academic area** on which to focus the educator observations (see the Introduction for considerations in selecting an instructional focus within a **priority academic area**).

The pre-observation investigation should include the following steps:

1) Analysis of relevant student performance and other indicators that frame the area(s) of focus.

2) Identification of how the focus area(s) relate to district, school, or educator team goals and priorities.

Next, select and ask an educator to volunteer to be observed and receive feedback as you complete the work for this task. The volunteer could be one of the educators with whom you worked in completing Task 1 or 2.

Before preparing to observe this educator, learn more about the typical instructional practice for the focus area in the school by visiting three or more similar classes (as in a walk-through or instructional round process or brief visit) to document the nature of instructional practice (including examining a sample of assignments and student work).

> **Educator performance has a direct relationship to the learning and growth of all students. As you investigate the learning context for the educator observation, consider how classroom instruction is shaped by individual students' strengths, interests, cultural assets, and needs; required standards; instructional objectives; standardized tests; and available resources.**
>
> **Each classroom has different demographic, cultural, and academic attributes that comprise its context. All impact an educator's instructional choices and strategies. Consider the relevant classroom context attributes and their relationship to the academic focus and instructional strategies.**

Finally, learn more about the educator observation practices in the school. Although you are not conducting a formal educator observation for evaluation purposes, it is important to know how educator observations are conducted in the school and to identify the criteria for high-quality, rigorous, and culturally responsive grade-level

teaching that the school and district use. For example, find out how frequently all educators are observed annually, the length and focus of educator observations, the way that observations are recorded, and whether they are coupled with pre-observation and post-observation meetings.

> **Determine the environment for educator observation, which varies widely among schools and districts. What are the expectations and practices for educator observation, and how do they relate to the state educator evaluation system? What training has the school or district provided to educators and leaders about educator evaluation? What is the culture of the school regarding educator observation, and how receptive are educators to being observed for non-formal, formative purposes? How can you build trust and maintain confidentiality in completing this task?**
>
> **How does the school climate and professional culture affect your capacity to undertake this task? What considerations are necessary in order to video record the observation and feedback sessions with the educator?**

To learn about the nature and focus of educator observations in the school, collect forms and procedures the school or district uses for educator observation and evaluation. If the district's observation protocols do not include standards or expectations for effective teaching, consider using the [Massachusetts Model System for Educator Evaluation: Teacher Rubric](#) to observe educator practice.

> **Identify district policies and practices for video recording educators and classes for developmental purposes only. They may include consent requirements for educators and students, restrictions on video recording classes, and other related requirements. See the guidance for video recording the classroom observation and post-observation meeting at the end of the task.**
>
> **Identify school and district policies and practices concerning the length of observation time.**

Component 2: Prepare

Intentional Equity Pause

Pause and use the questions below to guide reflection, identify barriers, and name specifically how you can address systemic biases and promote racial equity.

What steps will be taken to ensure that the pre-observation and post-observation questions use language that is fair and inclusive, and that addresses any possible bias from the observer?

What process will you use to reflect on and mitigate any biases that may impact judgments during conferences and observations?

This component consists of preparing for and conducting the pre-observation meeting in preparation for the educator observation. To prepare for this meeting, compile and analyze the following information:

- Evidence about the educator's students and their performance in the **priority academic area** using appropriate grade-level data and analyses for various demographic groups.
- The educator's lesson plans for the unit of study that contains the lesson that will be observed and the educator's intended instructional processes and student assignments leading to that lesson.
- Samples of student assignments and work related to the lesson being observed.

Using this information, generate questions for the educator about the lesson to be observed.

Next, schedule a pre-observation meeting with the educator that should include the following elements:

- Sharing information collected and identifying, through a two-way conversation, one or more areas of focus for the classroom observation, based on student needs, educator needs or interest, common instructional practices, *culturally and linguistically sustaining practice*, and student performance data.
- Presenting suggestions for improving the lesson.
- Documenting the educator's and your roles and participation in the pre-observation meeting.

> The focus of the observation should combine areas of interest to the educator—what the educator identified in the pre-observation meeting—and a focus you identified based on analysis of student performance and other indicators, observations of other classes, school priorities, and other evidence.
>
> The pre-observation meeting could also include a discussion of the students in the class, the lesson objectives, and the lesson's fit within the unit planned curriculum; the way that the lesson is structured to help the students acquire the skills and knowledge presented in it; the way that instruction is differentiated based on student needs; the use of a variety of formal and informal methods of assessments to measure student learning; how the lesson is grounded in culturally and linguistically sustaining practices for all students; the educator's assessment of their content; and instructional strengths and areas for improvement.

Component 3: Act

> **Intentional Equity Pause**
>
> Pause and use the questions below to guide reflection, identify barriers, and name specifically how you can address systemic biases and promote racial equity.
>
> Are there any biases or assumptions that could affect how you interpret the observational data? How could this potentially affect your perception of the classroom?
>
> What schoolwide practices are in place to ensure that all educators uphold high expectations for all students to meet or exceed grade-level standards? Might these practices create barriers for certain student groups?
>
> Are schoolwide policies and practices in place to foster classroom environments that honor and validate student and staff backgrounds, identities, strengths, and growth areas?
>
> Do the schoolwide policies and practices foster classroom environments that honor and validate the backgrounds, identities, strengths, and areas for growth of both students and staff?

In this step, observe the educator, analyze the observation and other evidence (e.g., lesson plan, samples of student work, student performance evidence), and provide feedback about instructional strengths and areas for improvement, as well as recommended supports or actions.

First, conduct and video record observations of no less than two class sessions (at least 30 minutes in all) using the district-identified educator observation protocol or the Massachusetts recommended educator observation guide, [Massachusetts Model System for Educator Evaluation](). Using this video recording, prepare a **continuous, unedited, 15-minute video** of the observed teaching that aligns to your pre-observation focus and post-observation feedback. (See the Candidate Confidentiality Guidelines for Video Recording at the end of this section.)

Next, in memo form of up to two single-spaced pages (up to 1,000 words) to the observed educator, prepare a written description of the observation that includes notes detailing evidence of instructional practices and student learning aligned with the selected standards-based instructional focus within the priority academic area. The notes—aligned to the observation video—should describe the observed teaching practices and techniques, pacing and timing, use of technology, and connections to curricular standards. It is critical to include an in-depth description of the observation, including both educator and student actions. Appropriate references to the district or other educator observation rubric used should be included. The memo should conclude with an assessment of the educator's strengths and areas for improvement addressing the standards-based instructional focus area in relationship to the effective teaching practices using the district's teaching rubric.

Using these results and the evidence compiled for the pre-observation meeting, select the strengths and most critical area(s) for improvement to discuss with the educator. In addition, identify a strategy (involving one or more sources of support) to foster educator learning and development in one (or more) identified focal areas, with a rationale for the way that the strategy will support educator learning. Prepare this information as preliminary discussion points for the post-observation meeting with the educator.

Conduct a post-observation meeting and feedback session with the educator to discuss strengths and areas for improvement, drawing on evidence from the observation. Discuss your observation analysis with the educator and include the following:

- Identify essential qualities of observed teaching practices aligned with the identified standards-based instructional focus area.

- Provide the educator with feedback using at least two sources of data (including observation, student assignments, and student work or assessment results).

- Engage the educator in a two-way conversation analyzing their performance.

- Discuss ideas for improving the educator's instructional practice and provide improved practice suggestions.

- Identify available references, resources, and strategies aligned with the educator's specific needs.

The aim of this post-observation meeting is to foster a learning conversation with the educator to improve practice. Engage the educator in reflecting on dimensions of effective teaching and evidence of student learning. The meeting should demonstrate mutual respect for, rapport with, and responsiveness to the educator and challenge them to engage in professional learning.

Video record this feedback session and submit 15 minutes of continuous, unedited footage as a submission for scoring.

> **Consider how educator performance can be improved with targeted feedback, professional development, and ongoing support.**
>
> **Remember that your role in completing this task is to support educator development, not to evaluate educator performance. All observation notes and feedback generated through this process are confidential and cannot be used as part of a formal educator evaluation process or for summative educator ratings.**
>
> **There are many ways of providing educators with support to improve their practice. Support should be developed through a two-way discussion that encourages an educator to take responsibility for their learning and improvement. It should include one or more of the following elements: information sharing, modeling, coaching, and feedback from peers (through inter-visitation and consultation) and suggestions from lead educators (for modeling and coaching), school leaders, and external consultants and resources (such as a professional development workshop, conferences, and graduate coursework) that are available in the school or district.**

Component 4: Assess

> **Intentional Equity Pause**
>
> **Pause and use the questions below to guide reflection, identify obstacles, and name specifically how you can address structural biases and promote equity.**
>
> *How did the evidence-based observed common school practices meet the needs of all students?*
>
> *How did the observations reflect equitable practices for all students?*

Analyze the development of your own leadership skills as you complete Task 3. Solicit

and analyze feedback from the educator about the pre-observation, observation, and post-observation experiences with you, your skills as you complete this task, and the implications of the feedback for the educator's work and improved practice. The following are required questions that you must ask the educator to solicit information about your observation and feedback skills.

- How effective was the candidate in facilitating the pre-observation discussion as a learning experience for you?

- How did the candidate conduct the observation? In what ways was the observation disruptive or not disruptive for your teaching?

- How effective was the candidate in conducting the post-observation meeting? What areas of teaching strengths and improvement did the candidate identify? How do they relate to your understanding of your own teaching practice?

- What recommendations for improvement did the candidate offer? How beneficial were they? How feasible? How likely are you to try them out?

Complete a detailed analysis of leadership skills used to complete this task. Include specific examples of those leadership skills and specific examples of what worked well and what could be improved. Focus your analysis on the steps you took to complete the pre-observation, observation, and post-observation activities and on your feedback to the educator to improve their practice with respect to increasing student learning. Think about the following:

- The aim of this step is to assess your own skills and the implications for your further leadership development in observing, assessing, providing feedback, and supporting an individual educator to improve instruction.

- <u>Avoid simply recapping the steps you took to complete the task; rather, focus on the analysis of your **leadership** in completing the task.</u> Draw implications from this work for improving your own educator observation and feedback skills for the future.

Artifacts, Documents, and Commentary

This section provides instructions for school leadership candidate submissions for the review process:

- Confidentiality, Anonymity, and Collaboration Form. An editable version is available within the ePortfolio system. You are required to complete and upload this form for each task.

- Five artifacts.

■ Documents that support your artifacts.

■ Commentary in narrative form in response to a series of prompts about the development of your leadership skills while completing this task.

> **Remember: Artifacts must not include personally identifying information about the candidate, the school staff, or the students. Submissions must comply with the Family Educational Rights and Privacy Act (FERPA) (20 U.S.C. § 1232g; 34 CFR Part 99), a federal law that protects the privacy of student education records. Be sure to protect the anonymity of the participants in your study by using generic labels (e.g., Principal A, School B, Educator C)—not aliases, pseudonyms, or first names—for the district, school, students, and all other stakeholders.**

Artifacts

The artifacts that you submit for scoring, each in a separate file, are described below.

The artifacts submitted must represent authentic work completed by candidates. Listed below are descriptions of the artifacts required for Task 3.

Artifact 1: Pre-Observation Template

This is a completed template that documents the pre-observation investigation and planning, describes the context of the classroom and the students to be observed, and articulates the **priority academic area** and instructional focus, including a rationale for the selection of this focus. It is important that the template include a **detailed summary of the pre-observation meeting and findings,** including not only a description of the student performance data but also how these data were discussed with the educator.

Additionally, information regarding specific student and or educator needs, student performance data, and common instructional practices, as well as school/district priorities discussed with the educator during the pre-observation meeting should be summarized as they relate to the selection of an instructional focus and/or modification of the proposed lesson plan.

The template is presented at the end of this section. Note: information missing from the template can reduce a candidate's score.

Pre-Observation Template

Information About the Educator to Be Observed: *Educator: Gender: Race/ethnicity: Licensure area:
Information About the Classroom to Be Observed: Grade level: Subject: Number of students: Gender composition of the class: Racial/ethnic composition of the class: Percentage of students classified as economically disadvantaged (in the school): Number of students with IEPs: Number of English Learners (EL): Number and roles of additional adults in the classroom (if applicable):
Information About the Lesson to Be Observed: Intended **priority academic area** and standards-based instructional focus for the lesson: Relationship between the intended focus and school/district goals or priorities: Relevant student performance data collected prior to the lesson using available state or local evidence and delineating by subgroup when possible: Intended common instructional practices for use in the **priority academic area** (including practices observed in visits to other classrooms and research-based practices in the content area): Educator's pre-lesson self-assessment in this focus area, including strengths, areas in need of improvement, and goals: Essential question for the lesson to be observed: Objective for the lesson to be observed: Summary of the pre-observation meeting, including starting and ending times, location, and topics discussed:
Other: School/district policies for educator observations (including contractual guidelines and/or union rules as applicable):

*Please use the blinding labels for names (e.g., Educator A).

Artifact 2: Educator Observation Video Recording

This is a **video recording of 15 continuous, unedited minutes** of observed teaching. Scorers will only review the first 15 minutes of the recording they receive.

If a portion of your submission (written or verbal) is not in English, a translation is required. The translation should be appended to Task 3 Artifact 1 (Pre-Observation Template). All primary dialogue (relevant, direct, i.e., not background chatter) from both educator and students should be translated. There is no page limit for required translations into English.

Artifact 3: Post-Observation Meeting Video Recording

This submission consists of a **continuous, unedited, 15-minute video recording** of your post-observation meeting with the observed educator. As stated in Component 3, the feedback should:

- identify essential qualities of observed teaching practices aligned with the identified standards-based instructional focus area,

- provide the educator with feedback using at least two sources of data (including observation, student assignments, and student work or assessment results),

- engage the educator in a two-way conversation analyzing their performance,

- discuss ideas for improving the educator's instructional practice and provide improved practice suggestions, and

- identify available references, resources, and strategies aligned with the educator's specific needs.

Please note: The continuous, unedited, 15-minute video segment **must** clearly show both **you and the educator you observed** in order to demonstrate how you are providing feedback and support as well as the educator's reactions in receiving feedback and engaging in discussions around improving their practice.

Artifact 4: Analysis of Observed Teaching

As stated in Component 3, write a memo of up to two single-spaced pages (up to 1,000 words) to the observed educator, providing summary documentation and analysis of the observed teaching using the school/district educator observation protocol. This memo should include observational notes that specifically address issues in the priority academic area and instructional focus, describing the observed teaching practices and techniques, pacing and timing, use of technology, and connections to curricular

standards. It is critical to include an in-depth description of the observation, including both educator and student actions. Appropriate references to the district or other educator observation rubric used should be included. The memo should conclude with an identification of the educator's strengths and areas for improvement.

Artifact 5: Analysis and Implications of the Feedback of the Observed Educator on the Candidate's Pre-Observation Meeting, Observation, and Post-Observation Meeting

Write a **memo** of up to two single-spaced pages (up to 1,000 words) to the educator, analyzing the observed educator's feedback about the pre-observation meeting, observation, and post-observation meeting experiences and the implications for the educator's work and improved student learning. Include an explanation of how the feedback was gathered and present the educator's own analysis of these experiences.

The following are required questions that you must ask the educator to solicit information about your observation and feedback skills.

- How effective was the candidate in facilitating the pre-observation discussion as a learning experience for you?

- How did the candidate conduct the observation? In what ways was the observation disruptive or not disruptive for your teaching?

- How effective was the candidate in conducting the post-observation meeting? What areas of teaching strengths and improvement did the candidate identify? How do they relate to your understanding of your own teaching practice?

- What recommendations for improvement in practice (e.g., evidence-based practices, culturally and linguistically sustaining practices) did the candidate offer? How beneficial were they? How feasible? How likely are you to try them out?

The memo should draw a clear connection between the priority academic area and instructional focus and the pre-observation meeting, observation analysis, post-observation meeting, and recommendations for improvements you provided to the educator.

> **Note: All supporting documents, reports, and tables of data that are referenced in these artifacts must be included in the appropriate category documents below and be appropriately cited.**

Documents by Category

Documents that must be submitted are supporting materials used by you to complete

the task. These documents provide supporting evidence pertaining to the task work and are necessary to inform scoring.

In addition to the artifact files described above, you must submit the following documents used in the task using a separate file for each of these three file categories:

- Category 1: The educator observation protocol and educator evaluation rubric commonly used in the school and district. If the district uses the state rubric, include a reference to, or citation of, the rubric instead of uploading the whole document. Identify which categories and indicators were used for the observation.

- Category 2: The unit of study, lesson plan outline, core student assignments, and work samples (such as worksheets, assignments, and completed work).

- Category 3: Samples of relevant student and educator information and artifacts related to the lesson that were not included in Category 2. These include:
  - Protocol and Rubric
  - Lesson Plan and Work Samples
  - Student and Educator Information

Commentary

You must submit a clearly presented and well-focused written commentary that explains how you accomplished the task.

Write a personal commentary of up to two single-spaced pages (up to 1,000 words) on your own learning and leadership development through this experience. Avoid simply recapping the steps you took to complete the task and focus on the analysis of your leadership for improving your ability to conduct an educator observation, provide feedback, and make recommendations for supports that could improve teaching practice. It is critical to include your own learning about your leadership and ability to recognize the characteristics of high-quality teaching and provide a range of supports to help classroom educators improve instruction and the performance of all students.

The commentary should not be a description of all the actions you took to complete the task or a reiteration of the work accomplished, which has been covered in other artifacts and documents. Rather, identify and describe the leadership skills you used during the course of the Task 3 project. Where applicable, provide examples of these leadership skills in action. Reference examples from the pre-observation meeting, the classroom observation video, the post-observation meeting video, and feedback from the educator. Be sure to reflect on the leadership skills you used and describe how your leadership skills developed or changed during the course of the Task 3 project.

- Specifically address your leadership skills and practices in response to the following questions about aspects of this task.

    - How effectively did you prepare for and conduct the pre-observation meeting? What leadership skills did you use to engage the educator? What lessons did you learn that might shape your leadership approach moving forward? What changes will you make moving forward?

    - How did you develop rapport with and demonstrate respect for the educator and engage them in professional learning through the observation and feedback process? Were your strategies successful? Moving forward, are there other strategies you may employ to make the process more collaborative?

    - Describe any adjustments you made to your leadership practices throughout the task. How did your leadership skills change over time?

    - How did you use the district or state educator observation protocol to conduct the observation, and how did you focus on and assess teaching practices?

    - How did the feedback you provided engage the educator in reflecting on dimensions of effective teaching (e.g., evidence-based practices, culturally and linguistically sustaining practices), on evidence of student learning, and on identifying specific areas for improving their instructional practice? Explain why your feedback focused on some areas for improvement rather than others. In what ways did you help the educator make progress in improving instructional practice for the designated focus area?

    - What problems did you encounter and what successes did you achieve in conducting the educator observation, providing feedback, and making recommendations for supports that could improve teaching practice? How did you engage the educator in the process?

    - What would you do differently to improve your effectiveness in supporting educator growth? Why would you take these new steps? Include specific examples of what worked well and how you would improve your leadership skills to support efforts to improve instruction and the performance of all students for the future.

    - What feedback did you receive from the educator you observed, school leaders, and stakeholders (e.g., students, educators, and/or parents/guardians and community members) regarding your leadership during Task 3, and how can you use this feedback to improve your leadership practices moving forward?

Task 3 PAL Evidence Chart

This chart provides a list of all required work products for PAL Task 3, as well as a description of supported file types for submission. Your PAL work products must conform to the artifact, document, category, and commentary specifications for each task. Candidates are required to submit all artifacts, commentary, and relevant documents without any information that would identify them (e.g., candidate name), their school or district, individual students, staff, and others who were part of the task completion.

Note that your evidence cannot contain hyperlinks to required uploads. Any web content you wish to include as part of your evidence must be submitted as a document file, which must conform to the file type requirements listed below.

Please refer directly to the Artifacts, Documents, and Commentary section of Task 3 in this handbook for detailed requirements pertaining to the intent and content requirements of each file.

PAL Task 3 Evidence Chart Leadership in Observing, Assessing, and Supporting Individual Educator Effectiveness				
Part	**Work Product/Evidence**	**Specifications (if required)**	**# of Files**	**Acceptable File Types**
Part A	Confidentiality, Anonymity, and Collaboration	Template provided	1	.doc; .docx; .odt; .pdf
Part B	Artifact 1—Pre-Observation Template	Template provided	1	.doc; .docx; .odt; .pdf
Part C	Artifact 2—Educator Observation Video Recording	15 continuous, unedited minutes	1	.flv, .asf, .qt, .mov, .mpg, .mpeg, .avi, .wmv, .mp4, .m4v

<table>
<tr><td colspan="5" align="center">**PAL Task 3 Evidence Chart**

Leadership in Observing, Assessing, and Supporting Individual Educator Effectiveness</td></tr>
<tr><td>Part D</td><td>Artifact 3—Post-Observation Meeting Video Recording</td><td>15 continuous, unedited minutes</td><td>1</td><td>.flv, .asf, .qt, .mov, .mpg, .mpeg, .avi, .wmv, .mp4, .m4v</td></tr>
<tr><td>Part E</td><td>Artifact 4—Analysis of Observed Teaching</td><td>Max 2 single-spaced pages (no more than 1,000 words)</td><td>1</td><td>.doc; .docx; .odt; .pdf</td></tr>
<tr><td>Part F</td><td>Artifact 5—Analysis and Implications of the Feedback of the Observed Educator on the Candidate's Pre-Observation Meeting, Observation, and Post-Observation Meeting Feedback</td><td>Max 2 single-spaced pages (no more than 1,000 words)</td><td>1</td><td>.doc; .docx; .odt; .pdf</td></tr>
<tr><td>Part G</td><td>Category Documents

1) Protocol and Rubric

2) Lesson Plan and Work Samples

3) Student and Educator Information</td><td>Separate file(s) for each of these 3 file categories</td><td>3</td><td>.doc; .docx; .odt; .pdf</td></tr>
<tr><td>Part H</td><td>Commentary</td><td>Max 2 single-spaced pages (no more than 1,000 words)</td><td>1</td><td>.doc; .docx; .odt; .pdf</td></tr>
<tr><td colspan="5">The maximum size for any individual file is 500 megabytes (MB). There is no limit on the number of MB uploaded for an entire task. The success of an upload through any application depends heavily on the type of network, the file size, and the network capacity at upload time.</td></tr>
</table>

Note: Scorers are not required to read artifacts and commentary *or* view video submissions that either exceed or do not meet the requirements. Submissions that fall far short of the required word length (or minute length for videos) are likely to lack sufficient information and detail, which would adversely affect how the scorers evaluate

the work products and thus the candidate's potential score.

If any submitted materials do not meet the [Submission Requirements](#), a condition code may be applied during the scoring process instead of a numerical score. If a condition code is applied to **any indicator**, the entire task will be unscorable. If your complete submission, or portions thereof, cannot be scored due to failure to meet Submission Requirements, no refund will be issued and no portion of your assessment fee can be applied to the cost of any future PAL registration or associated services.

Please consult the PAL website at www.ma-pal.nesinc.com to review submission requirements, passing standards, and other policies related to submitting and scoring of PAL tasks.

Submission Readiness

Scorers will be reviewing your submission to determine if you have complied with the PAL Submission Requirements located at the end of this handbook and on the [Candidates/Policies](#) page of the program website. If your submission does not meet the Submission Requirements, a condition code may be applied during the scoring process instead of a numerical score. If a condition code is applied to any indicator or rubric, the entire task will be unscorable.

Review the [Task 3 Evidence Chart](#) located in the Task 3 section of this handbook and on the Candidates/Resources page of the program website to confirm your completion of all required work products and specifications.

Before submitting, have you:

- Appropriately **blinded your submission with all candidate-, school-, district-, staff-, and student-identifying information removed?**

  Candidates are required to submit all artifacts, commentary, and relevant documents without any information that would identify them (e.g., candidate name), their school or district, individual students, staff, and others who were part of task completion. This includes screenshots, identifiable school logos and emblems, web addresses, URLs, and website graphics. Candidates must use generic labels (e.g., Principal A, School B, Teacher C, Teacher D) and **not** aliases, pseudonyms, or first names (e.g., Ms. Smith, Mr. Jones, Sally, Tom).

- Completed and uploaded the Confidentiality, Anonymity, and Collaboration Form for this task?

To confirm that the work has been appropriately blinded, candidates must submit a completed Confidentiality, Anonymity, and Collaboration Form with each task submission, in which they confirm that they have **removed all personally identifying information (e.g., candidate name) and the names of their school, district, staff, and others**.

The editable Confidentiality, Anonymity, and Collaboration Form is provided within the ePortfolio system. Candidates are required to **check the boxes** and upload this form for each task.

- Addressed a specific instructional focus within a **priority academic area** for the school?

  The instructional focus selected should be based on an analysis of common instructional practices, as well as student and educator needs. A **priority academic area** is an area in which improved student performance is desired, with input from staff at the school and district levels, and with attention to federally designated priority student groups or other groups that are a priority in the school.

- Cited supporting documents?

  Candidates are to cite supporting documents, submitted for each task, in the relevant artifacts for the same task.

  Is the submission complete in that it contains all supporting documents in each category? Hyperlinks provided in lieu of required uploads are not permissible.

- Clarified your role?

  Candidates must **explain their role** in completing the tasks to ensure the authenticity of the work being submitted.

  In addition, you must describe any and all points of collaboration with any other individual(s), include the rationale or purpose of the collaboration, and clearly state your role in the collaboration and the role(s) of your collaborators. Have you provided appropriate attribution(s) so that scorers are able to differentiate your original work from the work of others?

- Demonstrated feedback collection and use of feedback evidence?

  Throughout the four tasks, candidates are asked to collect, analyze, and use feedback on plans, strategies, and collaborative work. In written submissions and

supporting documents, candidates must demonstrate that feedback was collected; report on the number and roles of people interviewed, surveyed, or consulted; present analyses; and draw conclusions about the feedback. It is insufficient to present only the candidate's conclusions about feedback received.

■ Proofread all documents?

Candidates are to proofread all documents before uploading to

- Remove all names of the candidate, school, district, and staff and student-identifying information.
- Correct spelling, grammar, and punctuation.

Candidates are strongly encouraged to compare each artifact against the instructions and rubrics before submission to ensure relevance and completeness.

After uploading into the PAL system and before submitting, candidates are required to check their work to ensure that they do not upload duplicate artifacts and documents or blank files and that every file, including videos, can be opened without error.

■ Prepared all documents by category?

Submitted documents should be specific to the task and discussed and referenced in the relevant artifact(s). Complete school report cards, school improvement plans, and school handbooks should not be uploaded as documents. Only relevant tables of information or plan and handbook excerpts should be uploaded as category documents and discussed and referenced in the appropriate artifacts.

Documents must be legible. Handwritten observation notes, for example, must be readable.

■ Included an analysis of your leadership skills in the commentary?

The analysis of the candidate's leadership skills should be emphasized, regardless of whether the candidate feels the work on each task was successful. Include a description of how challenges were approached. Candidates should describe in detail, with specific examples, their leadership role throughout this task. Candidates should reflect on their leadership strengths and areas for growth, taking into consideration feedback gathered from relevant stakeholders.

■ Uploaded both video recordings and made sure they are of appropriate length and quality?

> The submissions of the educator observation video recording and the post-observation meeting video recording each must be 15 continuous, unedited minutes. The video recordings must be playable, audible, and viewable in the PAL ePortfolio system.

> In the educator observation video, the educator must be visible.

> In the post-observation video, both you and the educator must be visible.

■ Included a translation appended to Artifact 1 if needed?

> A translation is required for a Task 3 educator observation video recording if the instruction is delivered in a language other than English.

■ Reviewed the rubrics for this task?

> Read the descriptions of each rubric in the next section. The rubrics will be used to score candidates' work. Before submitting, candidates are strongly encouraged to evaluate their work using the rubrics.

Task 3: Leadership in Observing, Assessing, and Supporting Individual Educator Effectiveness Rubrics

How Will the Evidence of Your Leadership Practice Be Assessed?

As you prepare your artifacts and commentary, use the following rubrics to guide your thinking, planning, action, analysis, and presentation. Also keep in mind that your submission should reflect your engagement with the Intentional Equity Pauses.

Rubric 3.a: Plan

MA Standard 1. Instructional Leadership: Promotes the learning and growth of all students and the success of all staff by cultivating a shared vision that makes effective teaching and learning the central focus of schooling.

MA Standard 2. Management and Operations: Promotes the learning and growth of all students and the success of all staff by ensuring a safe, efficient, and effective learning environment, using resources to implement appropriate curriculum, staffing, and scheduling.

How does the candidate prepare for and conduct a pre-observation meeting?

The primary source of evidence for Rubric 3a is Artifact 1.

In addition to this primary source, relevant information found in other parts of the submission may impact the score for each rubric.

	Beginning (1.00 to 2.09)	Developing (2.10 to 2.74)	Meeting (2.75 to 3.49)	Exceeding (3.50 to 4.00)
3.a.1: Observation focus selection	Selects a focus with little or no analysis of common instructional practices, student needs, and educator needs.	Selects a focus with some analysis of common instructional practices **or** student **and** educator needs.	Selects a focus based on an analysis of common instructional practices **and** student **and** educator needs.	Identifies standards-based instructional focus, based on thorough analysis of common instructional practices **and** student **and** educator needs, which builds on district/school improvement efforts.
3.a.2: Pre-observation meeting	Conducts an informal pre-observation discussion with little or no connection to student data and priorities.	Conducts a brief pre-observation meeting that includes reference to a focal area and solicits the educator's input on an area of interest supported by meaningful student data.	Engages the educator in a pre-observation discussion, referring to common instructional practices or student/educator needs and student data specifically related to the focus area.	Engages the educator actively in a two-way discussion and refines proposed lesson. Builds discussion on common instructional practices and student and educator needs and grounds it in identified focus area based on student performance data.

Rubric 3.b: Conduct the Observation

MA Standard 1. Instructional Leadership: Promotes the learning and growth of all students and the success of all staff by cultivating a shared vision that makes effective teaching and learning the central focus of schooling.

MA Standard 2. Management and Operations: Promotes the learning and growth of all students and the success of all staff by ensuring a safe, efficient, and effective learning environment, using resources to implement appropriate curriculum, staffing, and scheduling.

How well does the candidate recognize qualities of teaching practice?

The primary sources of evidence for Rubric 3.b are Artifacts 2, 3, and 4.

In addition to these primary sources, relevant information found in other parts of the submission may impact the score for each rubric.

	Beginning (1.00 to 2.09)	Developing (2.10 to 2.74)	Meeting (2.75 to 3.49)	Exceeding (3.50 to 4.00)
3.b.1: Use and application of educator observation rubric	Identifies few or no essential qualities of observed teaching practices related to the focus area. Not clear if a district or state observation rubric is used.	Identifies some essential qualities of observed teaching practices. Uses the district or state observation rubric to define the essential qualities of observed teaching practice. Links the observation to the identified focus area.	Identifies essential qualities of observed teaching practices centered on clearly identified instructional focus area. Uses the district observation rubric as a framework for differentiating observed teaching practice.	Identifies essential qualities of observed teaching practices centered on identified instructional focus area and educator or student context issues (or possibly subgroup issues) identified in pre-observation meeting. Uses the district observation rubric as a framework for differentiating observed teaching practice.

	Beginning (1.00 to 2.09)	Developing (2.10 to 2.74)	Meeting (2.75 to 3.49)	Exceeding (3.50 to 4.00)
3.b.2: Description of observations	Provides only a description or summary of the observation, lacking detail or a clear connection to the priority academic area and instructional focus.	Describes some details of the observation, including descriptions and summary judgment somewhat aligned to the priority academic area and instructional focus.	Documents the teaching observation, including attention to specific teaching practices and techniques (e.g., pacing and time, use of technology, connections to curricular standards) aligned with the priority academic area and instructional focus. Provides descriptive comments, including educator and student actions. Provides supporting summary judgment. References applicable educator observation/rubric standards where necessary.	Prepares an annotated and detailed summary and analysis of the observed teaching. Analysis includes specific instructional strategies aligned with the priority academic area and instructional focus and their effectiveness in supporting student learning needs.

Rubric 3.c: Provide Feedback and Suggest Support

MA Standard 1. Instructional Leadership: Promotes the learning and growth of all students and the success of all staff by cultivating a shared vision that makes effective teaching and learning the central focus of schooling.

MA Standard 2. Management and Operations: Promotes the learning and growth of all students and the success of all staff by ensuring a safe, efficient, and effective learning environment, using resources to implement appropriate curriculum, staffing, and scheduling.

How does the candidate foster educator learning and development?

The primary sources of evidence for Rubric 3.c are Artifacts 3 and 5.

In addition to these primary sources, relevant information found in other parts of the submission may impact the score for each rubric.

	Beginning (1.00 to 2.09)	Developing (2.10 to 2.74)	Meeting (2.75 to 3.49)	Exceeding (3.50 to 4.00)
3.c.1: Feedback content	Provides feedback with limited or no connections to observation data and essential qualities of observed teaching practices. Does not maintain a consistent focus from the pre-observation, observation, and post-observation meetings; and data gathering.	Provides feedback with some connection to observations or essential qualities of teaching practice generally connected to the focus area. Generally maintains a common focus across some of the following: the pre-observation, observation, and post-observation meetings; and data gathering.	Links feedback to the following: • Identified focus area. • Observation data. Provides observation evidence for every conclusion drawn for feedback. • Essential qualities of observed teaching practice and performance-level indicators used in the district/state observation	Makes a strong connection between student performance indicators and educator observation analysis in feedback, which is coherent and integrated across the artifacts. Draws connections between the observations and different students' experiences in relation to indicators for the academic priority and instructional focus.

	Beginning (1.00 to 2.09)	Developing (2.10 to 2.74)	Meeting (2.75 to 3.49)	Exceeding (3.50 to 4.00)
			rubric. • Educator or student issues identified in pre-observation meeting, including the educator's priorities for the observation. • Student performance indicators that frame the academic priority and instructional focus. Maintains a consistent focus from the pre-observation, observation, and post-observation meetings through other data gathering.	
3.c.2: Rapport and educator engagement	Directs the discussion and does not solicit educator input or opinions. Discussion is directed by the observed educator with little or no useful feedback provided by the observer.	Presents observation findings and solicits some educator input.	Engages the educator in a two-way discussion about their teaching.	Engages educator actively in a two-way discussion and assists the educator in analyzing their own performance.
3.c.3: Educator development	Directs educator on steps to improve practice with few references to observation data and few recommended resources. Provides improved practice suggestions that are general or not essential to improving	Provides general suggestions for educator to improve practice with some reference to the observation data. Provides improved practice suggestions that are relevant and designed to improve teaching practices in at least	Engages educator actively in a two-way discussion on improving practice and anchors improvement needs in observation data and initial student performance indicators. Provides improved practice	Engages actively in a two-way discussion on improving practice, anchored in improvement needs in observation data and student performance indicators. Identifies resources/support that are tailored to educator's

Beginning (1.00 to 2.09)	Developing (2.10 to 2.74)	Meeting (2.75 to 3.49)	Exceeding (3.50 to 4.00)
teaching practices as identified in the educator observation.	one area identified in the educator observation.	suggestions that are relevant to the **priority academic area** and designed to improve teaching practices in two or more areas identified in the educator observation. Identifies available references, resources, or strategies.	specific needs. Engages the educator in proposing ways to improve instructional practice and means of monitoring and following up. Provides improved practice suggestions that target key ways for the educator to **improve student learning** in the priority academic area.

Rubric 3.d: Assess: Analyze and Identify Implications

MA Standard 2. Management and Operations: Promotes the learning and growth of all students and the success of all staff by ensuring a safe, efficient, and effective learning environment, using resources to implement appropriate curriculum, staffing, and scheduling.

MA Standard 4. Professional Culture: Promotes success for all students by nurturing and sustaining a school culture of reflective practice, high expectations, and continuous learning for staff.

How does the candidate assess their skills in observing, assessing, and providing feedback?

The primary source of evidence for Rubric 3.d is Commentary.

In addition to this primary source, relevant information found in other parts of the submission may impact the score for each rubric.

	Beginning (1.00 to 2.09)	Developing (2.10 to 2.74)	Meeting (2.75 to 3.49)	Exceeding (3.50 to 4.00)
3.d.1: Assessment of leadership skills and practices	Discusses leadership in general, if at all, but not relative to this task.	Conducts a general analysis of some leadership skills and practices used in completing this task, without drawing on specific experiences. Recaps the steps taken in completing the task with little evaluation of their leadership skills.	Evaluates relevant leadership skills and practices needed to complete this task by drawing on specific experiences. Identifies what worked well and what they could have done differently. Identifies changes that could be made to improve their leadership skills in the future.	Evaluates relevant leadership skills and practices used in completing this task, based on experiences, and describes how they adjusted leadership practices throughout the task. Solicited feedback on their leadership skills from stakeholders involved in this task. Identifies what worked well and what they could have done differently and proposes specific steps to improve their practice.

Task 4

Leadership for Family Engagement and Community Involvement

What Do School Leaders Need to Think about When Promoting Family Engagement and Community Involvement?

In Task 4, school leadership candidates develop a plan and implement one of the strategies described in it to improve a priority academic area through family engagement and community involvement. The goal is to support student learning in a school priority academic area they select. The priority academic area can be related to student academic performance (e.g., a priority academic area from another task) or to health, emotional, and/or social needs that impact learning. **However, whether directly academic or focused on health, emotional, and/or social needs, the priority academic area must be one that impacts student learning. If selecting a health, emotional, and/or social needs issue, the candidate must make clear connections between the focus area and students' academic achievement through available data. Candidates must use available state assessment data (e.g., MCAS) or local assessment/student academic achievement data to justify a connection to the specific priority academic area, as well as research when applicable. The focus of this task is not to promote community engagement solely for its own sake.**

The following are <u>not</u> acceptable priority academic areas because they are not sufficiently focused on specific student academic performance, or on health, emotional, and/or social needs and their connection to student achievement: attendance, absenteeism, discipline or behavioral issues, graduation or retention rates, and AP® enrollment. Although these concerns may be secondary issues related to a priority academic area or to health, emotional, and/or social needs, they cannot be the primary focus when promoting family engagement and community involvement.

The following example is helpful in illustrating how to select a priority academic area using available research and student achievement data to justify a Task 4 strategy.

> **Task 4 Example**
>
> **For the past three years, the X school has witnessed several changes in students' health, emotional, and/or social needs, which affect their achievement in the classroom. Multi-tiered systems of support for students' mental health and well-being in particular have been the focus of discussions in professional development, faculty meetings, and content-specific PLC meetings. In PLC meetings, student-level MCAS ELA achievement data have been analyzed. These data show that students who experience depression and bullying score on average 20% lower (or one achievement category lower) than their grade-appropriate peers. ELA common assessment data (e.g., midterms and final exams) demonstrate that this same group of students trail their peers by one full letter grade in reading and writing to text. Reducing both depression and cyberbullying is also part of the schoolwide and districtwide strategic plans. Research from the Collaborative for Academic, Social, and Emotional Learning (CASEL) has produced a model that has been proven to increase academic achievement for students with a variety of social-emotional learning needs (CASEL, 2019; Tolen et al., 2017). The team will consider this research, data from meetings referenced above, as well as the school's/district's strategic plan in order to formulate a plan of action that enlists parents/guardians and the community to increase supports for students' mental health and well-being to increase student achievement.**

As part of this task, you will form a working group in order to collaborate with a diverse group of school leaders, staff, families, and community representatives.

The candidate should form an initial idea about what the priority academic area should be after looking at available data in order to make appropriate selections for the working group. However, **the final selection of a priority academic area that impacts student learning should not be determined solely by the candidate** but by a collaborative group, which must include parents/guardians and community members. As an example, a candidate might designate fourth-grade ELA close-reading skills for English Learners (EL) as a Task 4 priority academic area after carefully analyzing ELA MCAS data, as well as fourth-grade, first-term, common assessment data and school and district improvement plans, and consulting with the fourth-grade PLC educators and members of the PTO. In this example, the group will meet throughout the investigation, planning, and strategy implementation process to investigate an area of academic concern, construct a plan, and implement a strategy. Throughout Task 4, the candidate should emphasize a collaborative approach to determining the priority academic area that impacts student learning, devising a plan to address the priority academic area, and

implementing the strategy.

For the purposes of this task, consider various types of family and community engagement that could be developed or improved as a means for addressing the priority academic area and thus **improving student learning**, such as ensuring accessible communication channels for families to raise concerns or advocate for change; using two-way channels to communicate; sharing information about student learning issues, student performance, and related school matters and responding to communication from the school; engaging family and community members in volunteering and supporting classroom and school activities (in relation to student learning needs); helping families to extend learning at home; involving family and community representatives in decision making on school matters related to the improvement of student learning; and accessing and utilizing community resources and services in ways that support student learning in the priority academic area directly or indirectly.

With your working group, develop a plan, including multiple strategies, that supports and improves the priority academic area and thus improves students' learning. Do not simply plan a series of events to expand community engagement in the school for its own sake. It must be clear that the purpose of the community engagement is improving the priority academic area.

Overall, it is important for a school leader to know the school, the priority academic area and how different groups of students may have different experiences with it, and the school's current approaches to family engagement and community involvement in support of this priority academic area and the challenges it must overcome. In addition, you must make connections to relevant research on leadership and family engagement and community involvement.

Your work on this task should directly relate to [Massachusetts Professional Standards and Indicators for Administrative Leadership](#) and draw on state guidelines on [Family, School, and Community Partnership Fundamentals](#). You may also reference [Strengthening Partnerships: A Framework for Prenatal through Young Adulthood Family Engagement in Massachusetts](#).

> **Consider what defines "family" in the school's context. Family includes any caregiver who can support students educationally and play a central role in children's school and home experiences, such as parents, guardians, siblings, and additional relatives, as well as additional child-care providers.**

Also consider what "community" means in the school's context. It can include educational, health, recreational, social, cultural, and community-based organizations

that serve the students. Community can also comprise local businesses; nonprofit organizations; libraries; religious organizations; parks and recreation departments; higher education institutions; and social service, police, juvenile justice, and other governmental offices that have an interest in the educational well-being of the students or can provide educational resources. Lastly, any local individuals with an interest in students' education as part of their civic interest can be part of the community.

What Do You Need to Do to Complete This Task?

- Select a priority academic area (such as the focus for the other tasks) based on student performance evidence (and on student differences in performance), or on evidence of student **health, emotional, and/or social needs that impact student learning**.

- Source and engage a diverse small working group of school community members and external stakeholders (individuals who represent family and/or community groups) who represent varied backgrounds, interests, and identities and who are directly impacted by the priority academic area.

- Meet regularly, in convenient times and locations, to create an engagement plan and prepare for the pilot implementation of one of the plan's strategies. Ensure access to high-quality translation and interpretation for meetings.

- Gather, analyze, and interpret school and community context information, data on student needs, and evidence related to existing family engagement and community involvement and needs, in relation to the priority academic area, by examining existing policies, strategies, programs, and practices.

- Develop a plan to address the priority academic area that involves school staff, family, and community members in collaboration with the working group. The plan should have several well-justified strategies to improve family engagement and community involvement in relation to the priority academic area, based on data or research, and be connected with the school and district plans for family engagement and community involvement.

- Pilot one strategy, proposed in collaboration with members of the working group, that engages families and/or communities in addressing the priority academic area; document the implementation process.

- Assess the implementation process and initial outcomes, including those relating to the improvement of student learning or addressing student health and social needs that impact student learning.

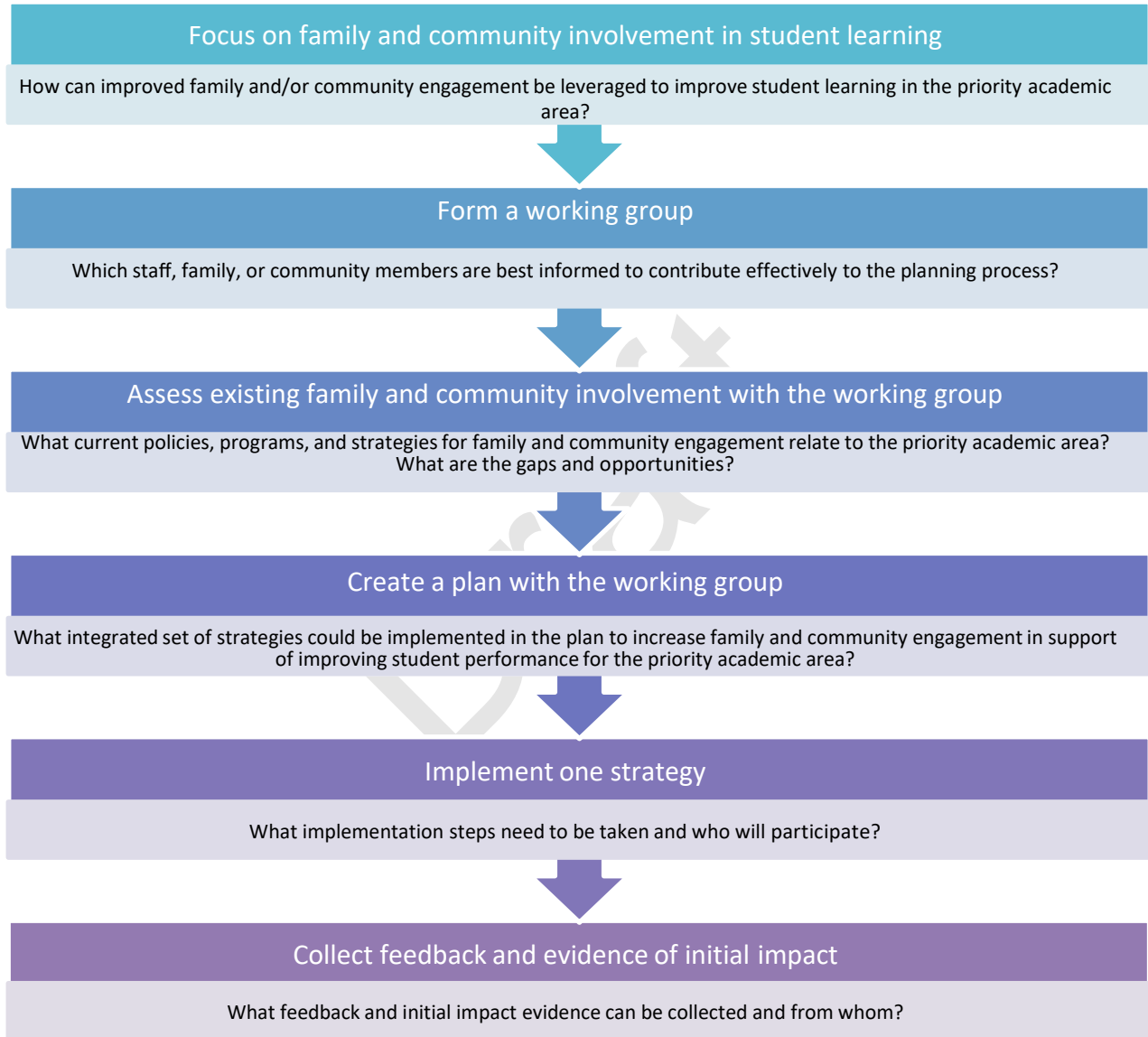## What Questions Do You Need to Consider to Complete This Task?

- How do family engagement and community involvement relate to the priority academic area that you selected? What evidence is available to support its selection? What is currently being done to encourage family and community participation in student learning, and what are the gaps and opportunities?

- How can improved or increased family and community engagement around the priority academic area leverage improvements in that area? How can family and community representatives of diverse interests be involved in the planning and implementation process in addressing the priority academic area?

- What tools or resources are being used for families and the community to provide high-quality (specific, actionable, timely) feedback on their experiences to support linguistically and culturally diverse communities?

- What family engagement and community involvement strategies can best support improved student learning or address student health and social needs that impact the priority academic area? What family and community resources could be used to support the priority academic area?

- How can reciprocal (two-way) family engagement and community involvement be fostered?

- What does it mean to engage families and the community with a school to support student learning or to meet student health, emotional, and social needs?

As you conduct work for Task 4, **intentional equity pauses** will be provided at several junctures to encourage your reflection. (See "[What Is an Intentional Equity Pause?](#)" in the Introduction.) The intentional equity pauses provide an opportunity for you to reflect on your own biases, identify barriers that impact student learning, and name ways that you can address systemic biases and promote racial equity.

The Components of the Task

Your investigation should progress through the inquiry process illustrated in Figure 4.1.

Figure 4.1. Task 4 Planning and Implementing a Change for Improved Family or Community Engagement

Focus on family and community involvement in student learning
How can improved family and/or community engagement be leveraged to improve student learning in the priority academic area?

Form a working group
Which staff, family, or community members are best informed to contribute effectively to the planning process?

Assess existing family and community involvement with the working group
What current policies, programs, and strategies for family and community engagement relate to the priority academic area? What are the gaps and opportunities?

Create a plan with the working group
What integrated set of strategies could be implemented in the plan to increase family and community engagement in support of improving student performance for the priority academic area?

Implement one strategy
What implementation steps need to be taken and who will participate?

Collect feedback and evidence of initial impact
What feedback and initial impact evidence can be collected and from whom?

Component 1: Investigate

Based on your initial idea for a priority academic area, identify two or three individuals from each of the following two categories: (1) school staff of various roles and levels and (2) family members and/or community representatives who represent diverse interests and who can be most supportive of your efforts to improve or increase family and community participation. **Please note: Category 2 representation must be individuals not employed within the school.** With this group, select and finalize a priority academic area for this task based on evidence related to student academic performance and student performance differences or on another student need that can impact student learning (such as a health, emotional, or social need). School leadership and family and community support are essential for this process. The group may be newly formed for this task or be all or part of an existing group. Most important, the group should be collaborative in determining the priority academic area that affects student learning, co-constructing the proposed plan, and implementing one of the plan's strategies.

With this school-family-community working group, meet two or more times for planning and to support the implementation of one of the plan's strategies, scheduling regular meetings with the working group at convenient times and in convenient locations either inside or outside of school. Throughout the task, clearly document how the group members participated.

With the group's assistance, identify existing school policies related to the priority academic area and relevant programs and services that the school provides. Gather evidence on how family and community members already participate and are engaged in the school's programs and services and on the effectiveness of the programs and services. Evidence of school-family-community engagement might include family member attendance and participation in student-related events, educator and family member survey responses on school communication and student learning support, family member use of learning resources and services for improving student learning (or related student health and social needs), participation in policy and program decision-making groups, observations of family and community support of student learning (or related student health and social needs), the existence of partnerships with local agencies and businesses, and/or the findings from focus groups with relevant parties.

Also with the group's assistance, identify gaps or needs for improved family engagement and community involvement related to the priority academic area.

Component 2: Prepare

> **Intentional Equity Pause**
>
> **Pause and use the questions below to guide reflection, identify obstacles, and name specifically how you can address structural biases and promote equity.**
>
> *Whom have you engaged in developing this plan to address the identified priority academic area? Who has potentially been excluded?*
>
> *How do awareness, knowledge, and understanding of the racial and cultural identities of the families within your community support the identified priority academic area?*
>
> *What strategies will ensure that the information shared with families is accessible and equitable?*

With the working group, prepare a focused and coherent plan to improve school–family engagement and community involvement. Include well-justified, evidence-based, inclusive, and equitable strategies for improving policies, practices, and programs that apply to the priority academic area and that support the school's and district's mission and priorities.

Strategies can focus on changes in policies; the improvement, expansion, or tailoring of existing practices; or the development of new programs and practices.

The goal of the strategies is to create opportunities for families and community members to directly support and enhance student learning or to address related student health, emotional, and social needs that impact student learning directly or indirectly. A persuasive theory of action—an explanatory map of how certain policies and practices will improve specific outcomes—should inform the development of the strategies and be presented in the plan. Draw on current research and best practices to identify strategies that are responsive to the school's priority academic area and feasible within the school and community culture and context. Then select one or more of them for implementation.

In addition to providing a blueprint for the development and implementation of the strategies, the plan should include steps to assess their implementation and outcomes.

Document the working group's role and input in preparing the plan. Before finalizing it, solicit feedback from school leaders and the broader school–family community and obtain their support to implement one or more strategies. Such feedback and

subsequent revisions should be reflected in the final version of the plan.

Include the following specific elements in the plan:

- <u>Goals and objectives</u>, including the scope and nature of the family and community engagement desired.

- A set of two or more <u>action strategies</u> to improve family and/or community engagement in relation to the priority academic area.

- A <u>theory of action</u> and rationale for how these strategies will lead to improved family and community engagement in ways that contribute to addressing the priority academic area and thus improved student learning.

- <u>Existing resources</u> to be accessed and <u>new resources</u> required.

- The <u>roles and responsibilities</u> of group members or staff who will implement the plan and its strategies.

- <u>Actions</u> to engage families, community members, and school staff to <u>support</u> the plan's implementation.

- A <u>timeline</u> for implementing the plan and selected strategies.

- The proposed <u>evaluation</u> technique and feedback method to determine how the plan and selected strategies lead to the intended outcomes.

> **Consider evidence-based strategies that foster a culturally and linguistically sustaining, inclusive, and equitable school culture by developing reciprocal school–family engagement and community involvement. These strategies include sharing knowledge and responsibility that strengthen the capacity of families and community members to become active partners in student learning and that develop the sensitivity and skill of school staff in engaging and working productively with family and community members to improve student learning.**
>
> **Such strategies should be culturally responsive and based on student, family, and community needs and priorities. They also take different forms at the elementary, middle, and high school levels.**

Component 3: Act

> **Intentional Equity Pause**
>
> **Pause and use the questions below to guide reflection, identify obstacles, and name specifically how you can address structural biases and promote equity.**
>
> *Were there any blind spots and biases in the developed plan?*
>
> *Is the plan culturally responsive and equity centered?*
>
> *Does the plan ensure streamlined communications for families and represent diverse populations and languages?*

Implement one family and community engagement strategy from the plan. Implementation should be undertaken in cooperation with school staff and family and/or community members, particularly those from the working group. The implementation process can include piloting a new or improved program or practice, developing and implementing a new policy, and/or creating new roles for family and/or community member involvement.

> **Consider a policy, program, or communication strategy that creates new, or enhances existing, forms of family and community engagement and involvement, that also improves or increases the number and diversity of family and/or community participants, and that leads directly or indirectly to improved student learning in the priority academic area. Consider, as well, how the strategy can be integrated within the school and will be sustained over time.**

Document the implementation of the strategy and the ways that family and community members are involved. Describe your role and the working group's role in this process. Identify the strengths and weaknesses of implementation and the ways that its enactment enhanced family and community participation. Identify problems that arose and document how they were addressed. Cite any evidence that demonstrates that these actions have already contributed to improved student learning.

Component 4: Assess

> **Intentional Equity Pause**
>
> **Pause and use the questions below to guide reflection, identify obstacles, and name specifically how you can address structural biases and promote equity.**
>
> *How did you facilitate the development of a culturally responsive plan that meets the needs of your school community?*
>
> *How did you implement a strategy and address implementation opportunities and challenges?*
>
> *What were the connections between data sources to provide you with a deeper level of understanding of the focus indicators and anti-racist leadership competencies?*

Solicit and analyze feedback from working group members on the feasibility, usefulness, and benefits of the school–family engagement and community involvement plan and implemented strategy. Collect information and documentation to show how the program, practice, or policy was implemented; how it has enhanced family and community participation; and how it addressed the priority academic area.

Solicit feedback from the working group members and school leaders about your leadership effectiveness in focusing on a high priority academic area, working with the group, developing the plan, and implementing a strategy.

Analyze the effectiveness of the planning and strategy implementation process that you and additional individuals used, particularly in how actively family and community members were involved. Discuss the implications for sustainability and future development or expansion of the strategy in this area.

Artifacts, Documents, and Commentary

This section provides instructions for school leadership candidate submissions for the review process:

- Confidentiality, Anonymity, and Collaboration Form. An editable version is available within the ePortfolio system. You are required to complete and upload this form for each task.

- Three artifacts.

- Other relevant documents that support your artifacts.

- Commentary in narrative form in response to a series of prompts about the development of your leadership skills while completing this task.

Artifacts

The artifacts that you submit for scoring, each in a separate file, are described below.

The artifacts submitted must represent authentic work completed by candidates and members of the working groups formed for three of the tasks. Listed below are descriptions of the artifacts required for Task 4.

> **As you discuss each step of the implementation process for Task 4, you should do so clearly and using the active voice. An example (for Artifact 2) would be the following: "Parent members of our team provided support to students during the academic intervention block by delivering math lessons and tutoring students." Be sure to actively describe in detail each step of the planning and implementation process.**

Artifact 1: Analysis of the Data, Priority Academic Area, and Plan

In a **proposal** of up to five single-spaced pages (up to 2,500 words) written by you to the principal or superintendent, submit a plan to improve or increase family engagement and community involvement with the purpose of improving student learning (directly or indirectly) related to a **priority academic area** (as described above). Specifically, the document <u>must</u> provide the following information:

- A description of, and justification for, the selection of a priority academic area for the plan's focus, related to student academic performance or student health, emotional, and social needs that impact student learning, which will serve as a focus for improving family and community involvement. Include an **analysis of state assessment data (e.g., MCAS) or local assessment/student academic achievement data** related to the **priority academic area**. Explain how the team analyzed the data in order to determine a plan of action. Provide all relevant documents related to the team's data analysis.

- A list of members (by category) of the small working group of representative school staff, family, and community members that you assembled; the rationale for including each member in the group; and a description of the group's purpose.

- A description of the ways that the group worked together, including the number of meetings, the members' roles and responsibilities, the issues discussed, and the actions taken. Include a discussion of your own role in these meetings.

- An analysis and interpretation of school and community context information relevant to the priority academic area and based on an examination of existing policies, strategies, and programs; and relevant information about existing family engagement and community involvement. Describe the sources of evidence.

- Information received from family and community members and staff about the gaps or needs for improved family engagement and community involvement to address the priority academic area. Describe the sources of evidence for this input.

- A plan for improving family engagement and community involvement in a priority academic area, with a compelling rationale justifying the proposed strategies. The plan must include the following elements:

  - <u>Goals and objectives</u>, including the scope and nature of the family and community engagement desired.

  - A description of <u>two or more</u> action <u>strategies</u> to improve family and community engagement in relation to the <u>priority academic area</u>.

  - A description of the theory of action and a research-based rationale for how these strategies will lead to improved family and community engagement in ways that contribute to improved student learning or related student health and social needs.

  - A list of <u>existing resources</u> and <u>new resources</u> required.

  - Definitions of <u>roles and responsibilities</u> of group members, staff, and/or stakeholders who will implement the plan.

  - Descriptions of <u>actions</u> to engage constituents, such as families, community members, and school staff, to <u>support</u> the plan's implementation.

  - A <u>timeline</u> for implementing the plan and its strategies.

  - A <u>proposed evaluation</u> and method for obtaining feedback to determine how the plan and selected strategies lead to the intended outcomes.

  - A description of <u>individuals</u> who contributed to the plan and how.

> **Note: Synthesize the data used to define your student priority academic area and the focus selected. Do not present tables of information without interpretation and conclusions about the focus used for this task. Use tables of data judiciously to guide and inform readers. Include all components.**

Artifact 2: Implementation of One Strategy

In a **memo** of up to three single-spaced pages (up to 1,500 words) written by you to the principal or superintendent, provide the following information:

- A detailed description of the strategy that was implemented, with justification for starting with this choice and information about how it addressed the priority academic area that affects student learning.

- An outline of the steps taken to implement the strategy, identification of the roles and responsibilities of those who enacted it, and a list of the resources used. <u>Clearly explain your own role in the implementation process, including your role in supporting group members' research and work on the priority academic area that affects student learning.</u>

- A description of how families, community members, and students were involved, and how they are benefiting from or being impacted by the strategy. Include quantifiable evidence on family, community, and student participation.

- A discussion of the strengths and weaknesses evidenced during implementation of the strategy, with an identification of problems that arose and the way they were addressed or would need to be addressed in the future. Describe the sources of evidence for this discussion.

- A discussion and compelling explanation of the ways the strategy enhanced family and community participation. <u>Provide quantifiable evidence</u> for this explanation and recommendations for improving and sustaining the strategy.

Artifact 3: Feedback

In a **report** of up to three single-spaced pages (up to 1,500 words) written by you to the principal or superintendent, present an analysis of feedback from working group members and school leaders and staff and stakeholders that includes the following:

- A description of the individuals who provided feedback on the design and execution of the plan and implemented strategy and how the feedback was collected. Include quantifiable information on the number of individuals and the nature of their feedback. As you explain feedback, differentiate it by group or individual.

- A summary analysis and interpretation of the feedback pertaining to the following questions about the plan:

  - How feasible is the family and community engagement plan for the school setting?

  - In what ways can the plan increase, improve, and diversify family and community engagement?

  - In what ways are the proposed strategies expected to improve or increase family and community engagement in order to improve student learning (or related health and social needs)?

  - How culturally responsive is the plan for the families, the community, and the school?

  - How can the plan be improved?

- A summary analysis and interpretation of the feedback pertaining to the implemented strategy:

  - In what ways did the strategy improve or increase family and community engagement?

  - In what ways did (or will) the strategy address the priority academic area and thus improve student learning?

  - How can each strategy's design, implementation, and use be improved?

  - How sustainable is the strategy?

- A summary analysis and interpretation of the feedback pertaining to your leadership skills, including:

  - A description of which group members provided feedback, including differentiated feedback by group member.

  - A description of your group facilitation, strategy planning, and implementation skills.

Documents by Category

Documents that must be submitted are supporting materials used by you and the working groups to complete the task. These documents provide supporting evidence pertaining to the task work and are necessary to inform scoring.

In addition to the artifact files described above, submit the following documents used in the task using a separate file for each of these three file categories:

- Category 1: Evidence compiled to justify the priority academic area selected and the role for family and community engagement.

- Category 2: A summary of relevant school policies and a description of currently implemented strategies and programs for family engagement and community involvement.

- Category 3: Evidence of existing participation and engagement of families and community representatives for the priority academic area. Include quantifiable information and, where applicable, any questionnaire or survey instruments and feedback received from participants and working group members.

Commentary

You must submit a clearly presented and well-focused written commentary that explains how you accomplished the task.

Write a personal commentary of up to two single-spaced pages (up to 1,000 words) on your own learning and leadership development through this experience. Avoid simply recapping the steps you took to complete the task; instead, focus on the analysis of your leadership for developing a plan to improve family and community engagement and implementing at least one strategy described in the plan. It is critical to include your own learning about your leadership and ability to foster community engagement.

The commentary should not be a description of all of the actions you took to complete the task or a reiteration of the group's work accomplished, which has been covered in other artifacts and documents. Rather, identify and describe the leadership skills you used during the course of the Task 4 project. Where applicable, provide examples of these leadership skills in action. Be sure to reflect on the leadership skills you used and describe how your leadership skills developed or changed during the course of the Task 4 project.

Specifically address your leadership skills and practices in response to the following questions about aspects of this task.

- How did you determine the priority academic area and the needs for improved family and community engagement in relation to this priority academic area? What specific lessons did you learn that may shape your leadership approach going forward?

- How did you form a working group and engage others in the planning process throughout the planning and implementation process?

- How did you facilitate the development of a culturally responsive plan?

- How did you implement a strategy and address implementation opportunities and challenges?

- How did you garner support and solicit feedback for the plan and strategy among working group members, family and community members, and school leadership team members?

- How did you foster the participation of all family and community members throughout planning and implementation?

- What problems did you encounter and what successes did you achieve in facilitating improved family and community engagement? Describe any adjustments you made to your leadership practices throughout the task. How did your leadership skills change over time?

- What insights did you gain about a leader's role in facilitating family and community engagement? What would you do differently to improve your ability to foster engagement? Why would you take these new steps? Include specific examples of

what worked well and how you would improve your leadership skills in the future.

- Identify your successes and challenges as a leader in completing Task 4. Explain what you would have done differently, based on your experiences.

- Identify the implications for your future school leadership work, including acknowledgment of your strengths and areas for growth, proposing what skills and practices you need to improve to develop further as a school leader.

- What feedback did you receive from working group members, school leaders, and stakeholders (e.g., students, educators or administrators outside of the working group, and/or parents/guardians and community members) regarding your leadership during Task 4, and how can you use this feedback to improve your leadership practices moving forward?

Task 4 PAL Evidence Chart

This chart provides a list of all required work products for PAL Task 4, as well as a description of supported file types for submission. Your PAL work products must conform to the artifact, document, category, and commentary specifications for each task. Candidates are required to submit all artifacts, commentary, and relevant documents without any information that would identify them (e.g., candidate name), their school or district, individual students, staff, and others who were part of task completion.

Note that your evidence cannot contain hyperlinks to required uploads. Any web content you wish to include as part of your evidence must be submitted as a document file, which must conform to the file type requirements listed below.

Please refer directly to the Artifacts, Documents, and Commentary section of Task 4 in this handbook for detailed requirements pertaining to the intent and content requirements of each file.

PAL Task 4 Evidence Chart Leadership for Family Engagement and Community Involvement				
Part	**Work Product/Evidence**	**Specifications (if required)**	**# of Files**	**Acceptable File Types**
Part A	Confidentiality, Anonymity, and Collaboration	Template provided	1	.doc; .docx; .odt; .pdf
Part B	Artifact 1—Analysis of the Data, Priority Academic Area, and Plan	Max 5 single-spaced pages (no more than 2,500 words)	1	.doc; .docx; .odt; .pdf
Part C	Artifact 2—Implementation of One Strategy	Max 3 single-spaced pages (no more than 1,500 words)	1	.doc; .docx; .odt; .pdf

PAL Task 4 Evidence Chart **Leadership for Family Engagement and Community Involvement**				
Part D	Artifact 3—Feedback	Max 3 single-spaced pages (no more than 1,500 words)	1	.doc; .docx; .odt; .pdf
Part E	Category Documents 1) Priority Academic Area Justification 2) Summary of Policies and Strategies 3) Participation and Engagement of Families	Separate file(s) for each of these 3 file categories	3	.doc; .docx; .odt; .pdf
Part F	Commentary	Max 2 single-spaced pages (no more than 1,000 words)	1	.doc; .docx; .odt; .pdf
The maximum size for any individual file is 500 megabytes (MB). There is no limit on the number of MB uploaded for an entire task. The success of an upload through any application depends heavily on the type of network, the file size, and the network capacity at upload time.				

Note: Scorers are not required to read artifacts and commentary that either exceed or do not meet the requirements. Submissions that fall far short of the required word length are likely to lack sufficient information and detail, which would adversely affect how the scorers evaluate the work products and thus the candidate's potential score.

If any submitted materials do not meet the Submission Requirements, a condition code may be applied during the scoring process instead of a numerical score. If a condition code is applied to **any indicator**, the entire task will be unscorable. If your complete submission, or portions thereof, cannot be scored due to failure to meet Submission Requirements, no refund will be issued and no portion of your assessment fee can be applied to the cost of any future PAL registration or associated services.

Please consult the PAL website at www.ma-pal.nesinc.com to review submission requirements, passing standards, and other policies related to submitting and scoring of PAL tasks.

Submission Readiness

Scorers will be reviewing your submission to determine if you have complied with the PAL Submission Requirements located at the end of this handbook. If your submission does not meet the Submission Requirements, a condition code may be applied during the scoring process instead of a numerical score. If a condition code is applied to any indicator or rubric, the entire task will be unscorable.

Review the Task 4 Evidence Chart located in the Task 4 section of this handbook and on the Candidates/Resources page of the program website to confirm your completion of all required work products and specifications.

Before submitting, have you:

- Appropriately **blinded your submission with all candidate-, school-, district-, staff-, and student-identifying information removed?**

  Candidates are required to submit all artifacts, commentary, and relevant documents without any information that would identify them, their school or district, individual students, staff, and others who were part of task completion. This includes screenshots, identifiable school logos and emblems, web addresses, URLs, and website graphics. Candidates <u>must</u> use generic labels (e.g., Principal A, School B, Teacher C, Teacher D) and **not** aliases, pseudonyms, or first names (e.g., Ms. Smith, Mr. Jones, Sally, Tom).

- Completed and uploaded the Confidentiality, Anonymity, and Collaboration Form for this task?

  To confirm that the work has been appropriately blinded, candidates must submit a completed Confidentiality, Anonymity, and Collaboration Form with each task submission, in which they confirm that they have **removed all personally identifying information (e.g., candidate name) and the names of their school, district, staff, and others**.

  The editable Confidentiality, Anonymity, and Collaboration Form is provided within the ePortfolio system. Candidates are required to **check the boxes** and upload this form for each task.

- Addressed a **priority academic area** or a student health, emotional, or social issue that impacts student learning for the school?

- Cited supporting documents?

    Candidates are to cite supporting documents, submitted for each task, in the relevant artifacts for the same task.

    Is the submission complete in that it contains all supporting documents in each category? Hyperlinks provided in lieu of required uploads are not permissible.

- Clarified your role?

    Candidates must **explain their role** in completing the tasks to ensure the authenticity of the work being submitted.

    In addition, you must describe any and all points of collaboration with any other individual(s), include the rationale or purpose of the collaboration, and clearly state your role in the collaboration and the role(s) of your collaborators. Have you provided appropriate attribution(s) so that scorers are able to differentiate your original work from the work of others?

- Demonstrated feedback collection and use of feedback evidence?

    Throughout the four tasks, candidates are asked to collect, analyze, and use feedback on plans, strategies, and collaborative work. In written submissions and supporting documents, candidates must demonstrate that feedback was collected; report on the number and roles of people interviewed, surveyed, or consulted; present analyses; and draw conclusions about the feedback. It is insufficient to present only the candidate's conclusions about feedback received.

- Proofread all documents?

    Candidates are to proofread all documents before uploading to:

    - Remove all names of the candidate, school, district, and staff and student-identifying information.
    - Correct spelling, grammar, and punctuation.

    Candidates are strongly encouraged to compare each artifact against the instructions and rubrics before submission to ensure relevance and completeness.

    After uploading into the PAL system and before submitting, candidates are

required to check their work to ensure that they do not upload duplicate artifacts and documents or blank files and that every file can be opened without error.

■ Prepared all documents by category?

Submitted documents should be specific to the task and discussed and referenced in the relevant artifact(s). Complete school report cards, school improvement plans, and school handbooks should not be uploaded as documents. Only relevant tables of information or plan and handbook excerpts should be uploaded as category documents and discussed and referenced in the appropriate artifacts.

Documents must be legible. Handwritten agendas and minutes, for example, must be readable.

■ Included an analysis of your leadership skills in the commentary?

The analysis of the candidate's leadership skills should be emphasized, regardless of whether the candidate feels the work on each task was successful. Include a description of how challenges were approached. Candidates should describe in detail, with specific examples, their leadership role throughout this task. Candidates should reflect on their leadership strengths and areas for growth, taking into consideration feedback gathered from relevant stakeholders.

■ Described a working group and demonstrated family or community member input in the planning process?

■ Included evidence that at least one of the plan's strategies was implemented?

■ Reviewed the rubrics for this task?

Read the descriptions of each rubric in the next section. The rubrics will be used to score candidates' work. Before submitting, candidates are strongly encouraged to evaluate their work using the rubrics.

Task 4: Leadership for Family Engagement and Community Involvement Rubrics

How Will the Evidence of Your Leadership Practice Be Assessed?

As you prepare your artifacts and commentary, use the following rubrics to guide your thinking, planning, action, analysis, and presentation. Also keep in mind that your submission should reflect your engagement with the Intentional Equity Pauses.

Rubric 4.a: Plan to Promote Family and Community Involvement

MA Standard 3. Family and Community Engagement: Promotes the learning and growth of all students and the success of all staff through effective partnerships with families, community organizations, and other stakeholders that support the mission of the school and district.

> **How does the candidate document existing family engagement and community involvement strategies to promote a proposal for improving a priority academic area?**

The primary sources of evidence for Rubric 4.a are Artifacts 1 and 3.

In addition to these primary sources, relevant information found in other parts of the submission may impact the score for each rubric.

	Beginning (1.00 to 2.09)	Developing (2.10 to 2.74)	Meeting (2.75 to 3.49)	Exceeding (3.50 to 4.00)
4.a.1: Investigation of the priority academic area	Provides a vague reference to a priority academic area that impacts student learning. Makes limited or no connection to family and community engagement in defining a priority academic area that impacts student learning. Does not investigate current school practices or data that focus on family engagement and community involvement.	Identifies a priority academic area that impacts student learning and makes general use of data. Makes some connection between family and community engagement and a priority academic area that impacts student learning. Informally or unsystematically compiles information about current practices for family and community engagement.	Clearly defines a priority academic area that impacts student learning using available student performance or other relevant data. Clearly explains how developing or expanding family and community engagement would enhance a priority academic area that impacts student learning or issue impacting it. Systematically describes existing information and data	Clearly defines a priority academic area that impacts student learning and differentiates student needs within it for different student groups using relevant qualitative and quantitative data. Clearly explains how developing or expanding family and community engagement should take into account the different needs and roles of families and community members.

	Beginning (1.00 to 2.09)	Developing (2.10 to 2.74)	Meeting (2.75 to 3.49)	Exceeding (3.50 to 4.00)
			on policies, programs, and strategies for family and community engagement.	Differentiates analyses of school policies, programs, and strategies for family and community engagement for different student groups in a priority academic area.
4.a.2: Investigation of work group engagement	Consults with others but does not form a working group. Demonstrates little or no evidence that family or community members were involved in the planning process. Does not explain the candidate's role in the working group.	Forms a working group that meets once. Includes one family and/or community member in the planning. Generally consults with school leaders, staff, and family and community members in the planning process. Provides a general description of the candidate's role in the working group.	Forms and facilitates an ongoing working group. Includes two or more family and community members in the planning process. Actively engages appropriate representative school leaders, staff, and family and community members as working group members in the planning process. Explains the candidate's role in facilitating the working group and supporting the research and planning.	Forms and shares leadership with an ongoing working group. Forms a working group representative of school leaders, staff, and family and community members in the planning process. Uses various strategies to seek input from the larger family or community membership to inform planning and decision making for the engagement plan. Explains the candidate's role in facilitating the working group, sharing responsibility, supporting the research and planning, and engaging the broader parent/guardian and community members in the planning process.

4.a.3: Preparation of the plan, including strategies	Proposes an idea with few of the plan elements listed in Artifact 1. Has only one strategy. Lacks a rationale for how the plan will improve or increase family involvement or improve student learning.	Proposes a plan with some supporting detail and plan elements listed in Artifact 1. Has a plan with two or more strategies. Has a vague rationale for how the plan will improve or increase family and community engagement in the priority academic area.	Develops a complete, detailed plan. Includes two or more distinct strategies that focus on the same priority academic area issue. Explains how the plan is responsive to family and community engagement in the priority academic area.	Develops an integrated, coherent plan with a compelling rationale focused on a priority academic area of student learning. Has a plan with two or more distinct strategies that focus on the same priority academic area issue and reflect different groups and needs. Provides evidence on how the proposed strategies will improve or increase family and community engagement and contribute to improved student learning.

Rubric 4.b: Implement an Engagement or Involvement Strategy

MA Standard 3. Family and Community Engagement: Promotes the learning and growth of all students and the success of all staff through effective partnerships with families, community organizations, and other stakeholders that support the mission of the school and district.

> **How does the candidate implement an effective strategy to improve family engagement or community involvement?**

The primary source of evidence for Rubric 4.b is Artifact 2.

In addition to this primary source, relevant information found in other parts of the submission may impact the score for each rubric.

	Beginning (1.00 to 2.09)	Developing (2.10 to 2.74)	Meeting (2.75 to 3.49)	Exceeding (3.50 to 4.00)
4.b.1: Implementation of the strategy	Claims to have implemented a family and community engagement strategy with little or no description of steps or evidence. Does not describe how family and community members participate in the strategy. Does not explain the candidate's role in implementing the strategy.	Generally describes the strategy that was implemented and the implementation steps. Describes limited family and community involvement in participating in the strategy or in benefiting from it. Describes generally how the candidate was involved in implementing the strategy.	Clearly describes the strategy that was implemented. Provides a detailed description of the implementation steps, roles, resources used, and challenges. Provides some detail on how the strategy involved family and community members in the implementation and how it benefited or impacted the targeted family or community group. Describes the candidate's role in implementing the strategy.	Provides a coherent, detailed description of the strategy and implementation steps, roles, resources used, and challenges encountered. Provides detail on how the targeted family and community group members benefit from, or are impacted by, the strategy. Describes the candidate's role in the implementation and how they share responsibility in implementing the strategy.

Rubric 4.c: Analyze Feedback from Participants and Assess Leadership Skills

MA Standard 3. Family and Community Engagement: Promotes the learning and growth of all students and the success of all staff through effective partnerships with families, community organizations, and other stakeholders that support the mission of the school and district.

MA Standard 4. Professional Culture: Promotes success for all students by nurturing and sustaining a school culture of reflective practice, high expectations, and continuous learning for staff.

How does the candidate assess the effectiveness of the proposed plan and implemented strategy and their own leadership role?

The primary source of evidence for Rubric 4.c is Commentary.

In addition to this primary source, relevant information found in other parts of the submission may impact the score for each rubric.

	Beginning (1.00 to 2.09)	Developing (2.10 to 2.74)	Meeting (2.75 to 3.49)	Exceeding (3.50 to 4.00)
4.c.1: Assessment and analysis of feedback on the family and community engagement plan and strategy	Provides a summary assessment of feedback on the plan or strategy but not both. Provides little or no detail about which individual(s) provided the feedback and how feedback was obtained. Does not collect feedback from working group members. Does not clearly explain the candidate's role in collecting feedback.	Collects feedback on the plan from some working group members. Collects feedback on the implementation strategy from some working group members. Collects feedback on the implemented strategy from some family or community members who participated in the strategy. Provides a cursory analysis of feedback in a summary form.	Systematically collects, analyzes, and interprets feedback from working group members to determine the effectiveness of the plan and strategy. Systematically collects, analyzes, and interprets feedback from family and community members who participated in the strategy. Clearly explains the candidate's role in collecting, analyzing, and interpreting the feedback	Coherently analyzes and interprets feedback from working group members about how and in what ways the plan and strategy were effective and impacted the priority academic area. Provides evidence on how the feedback was collected and from whom. Collects, analyzes, and interprets family and community member feedback on the implemented strategy,

		Explains the candidate's role in collecting feedback.	data.	differentiating by relevant subgroups.
				Draws implications for future development of the plan and strategy and the strategy's sustainability.
				Explains the candidate and work group members' roles in collecting, analyzing, and interpreting feedback.
4.c.2: Assessment of leadership skills and practices	Discusses leadership in general, if at all, but not relative to this task. Does not evaluate relevant leadership skills.	Conducts only a general analysis of some leadership skills and practices used in completing this task, without drawing on specific experiences. Identifies the steps taken in completing the task with little evaluation of their leadership skills.	Draws on specific learning experiences to evaluate their leadership skills. Identifies what worked well and what they could have done differently. Identifies changes that could be made to improve their leadership skills in the future.	Drawing on specific learning experiences, describes the relevant leadership skills used to complete the task. Evaluates relevant leadership skills and practices used in completing this task and, based on experiences, describes how they adjusted leadership practices throughout the task. Solicited feedback on their leadership skills from stakeholders involved in this task.

Candidate Score Reporting and Guidance

Because there are two score components, candidates will have access to two levels of score reporting information.

- The first is a score report that shows the detailed scoring information for each task submitted for that specific reporting date. This report shows the indicator, rubric, and task scores for each task submitted for that reporting date and indicates by task whether the score meets the threshold requirement. From this report, candidates will also be able to access rubric language feedback based on the indicator scores.

- The second is a candidate's best attempt PAL Score Summary Report, which shows the PAL Summary scoring information for the candidate's best attempt for each task. Based on the best attempt, a total PAL score is displayed that indicates whether the candidate has passed the PAL assessment by earning a total score that meets or exceeds the required total passing score in place.

Note: Best attempt applies only at the task level, not at the indicator level. A candidate cannot combine best indicator scores across multiple submissions to determine an overall task score.

Additional information is available on the **Candidates/Scores** page of the PAL program website, including:

- **Understanding Your PAL Score Report** (Note: The Commissioner of Elementary and Secondary Education, based on the recommendations of the PAL Technical Advisory and Standards Setting committees, will establish the performance standards for the updated PAL in Spring 2025. The information included here will be updated, as needed, following that work.)

- **Retaking PAL**

Submission Requirements and Condition Codes

Condition Codes

In order for your PAL submission to be scored, it must meet the **Submission Requirements**. If your submission does not meet these requirements and your submission or a portion of your submission is deemed unscorable, the task(s) will be marked as "Incomplete," and your associated score report will specify one or more of the following "Condition Codes," indicating the requirement(s) that were not met. Where applicable, examples of reasons why a particular condition code may be assigned are provided as an illustration for candidates. Please note, however, that these are examples only and not a complete list of reasons.

Condition Code	General Reason for Condition Code	Associated Task(s)			
		1	2	3	4
A	Work is not blinded	✓	✓	✓	✓
B	Does not address a priority academic area related to student academic performance or for Task 4 to the health, emotional, and/or social needs that impact learning	✓	✓	✓	✓
C	■ Does not include all supporting documents, or; ■ Incorrect file provided, or; ■ Missing artifact or referenced artifact not submitted, or; ■ Blank or incomplete artifact submitted, or; ■ Inaccessible file (file could not be opened for technical reasons), or; ■ Hyperlinks are provided in lieu of required evidence, or; ■ Confidentiality, Anonymity, and Collaboration Form has not been completed or is missing	✓	✓	✓	✓

Condition Code	General Reason for Condition Code	Associated Task(s)			
		1	2	3	4
D	■ Videos are not the appropriate length (15 minutes) or quality, are edited, or are unplayable/inaudible, or; ■ Video cannot be played, or; ■ Video is of insufficient technical quality to view, or; ■ Video is not the required length of 15 minutes, or; ■ Educator or candidate is not visible in the post-observation video, or; ■ Missing translation required for videos where instruction is delivered in a language other than English, or; ■ Video is edited and is not a continuous segment			✓	
E	Does not describe a working group and/or does not include family or community input		✓		✓
F	A strategy was not implemented		✓		✓
X	No numeric score due to Condition Code(s) elsewhere in task	✓	✓	✓	✓

Condition Code A may be assigned to uploads throughout Tasks 1–4 if materials have not been properly blinded with **all** candidate-, school-, staff-, and student-identifying information removed (submissions prior to 2018–2019).

Condition Code B may be assigned to uploads throughout Tasks 1–4 if your work does not address a priority academic area related to student academic performance or for Task 4 to the health, emotional, and/or social needs that impact learning.

Condition Code C may be assigned to uploads throughout Tasks 1–4 if:

■ All required files/documents are not uploaded.

■ Blank or incomplete artifacts are submitted.

■ Incorrect files are provided.

■ Inaccessible files are uploaded (files could not be opened for technical reasons).

■ Missing artifacts or referenced artifacts are not submitted.

■ Hyperlinks to external files are provided in lieu of required uploads. Note: Hyperlinks are

acceptable only as references in your citations but will not be used by scorers to access information outside of your submission.

- Confidentiality, Anonymity, and Collaboration Form has not been completed or is missing.

Condition Code D applies to video uploads and may be assigned in Task 3 if:

- Videos are not the appropriate length and quality.

- Videos are edited and not continuous.

- Videos cannot be played.

- Audio cannot be heard.

- Unintelligible/unviewable videos are uploaded.

- The educator or candidate is not visible in the post-observation video.

- A translation for instruction delivered in a language other than English (in the Task 3 observation video) is not provided. Translations should be appended to Task 3 Artifact 1 (Pre-Observation Template). There is no page limit for required translations into English.

All required files and video components must conform to technical specifications (e.g., format, file type), as identified in the task Evidence Charts in this handbook (also located on the [Candidates/Resources](#) page of the PAL program website), and be viewable by scorers.

After uploading your videos, you must review them in the Pearson ePortfolio system prior to submitting your assessment, even if the video file was playable prior to upload. You are responsible for ensuring that your submitted videos meet the technical specifications and length requirements, and can be viewed by scorers, by confirming successful playback prior to submission.

Condition Code E may be assigned to uploads in Tasks 2 and 4 if your work does not describe a working group and/or (for Task 4 only) demonstrate family or community member input in the planning process.

Condition Code F may be assigned to uploads in Tasks 2 and 4 if your work does not include evidence that (for Task 2) a PLC was formed for the purposes of professional learning in the priority academic area or (for Task 4) at least one of the plan's strategies was implemented.

Assessment Policies

The [Candidates/Policies](#) page of the PAL program website contains Registration, Assessment, and Score Reporting Policies.

Candidates are expected to review the policies and will be required to confirm as part of the registration and submission processes.

The following is a brief description of the Assessment Policies.

Rules of Assessment Participation

Rules and requirements for registering and participating in the PAL assessment.

Confidentiality Guidelines

Candidate Confidentiality Guidelines for Video Recording are contained in this handbook.

Video Recording Permissions

Memo from the Massachusetts Department of Elementary and Secondary Education regarding use of video. Model consent forms are provided on the program website.

Submission Requirements and Condition Codes

Requirements for a fully scorable task submission and score report codes indicating requirements not met.

Submission Attestations

Candidate confirmation of program requirements that is part of the submission process.

Retake Policy

Rules and guidelines for task retakes.

Strong Examples

A set of strong examples for each of the four tasks is available on the Candidates/Resources page of the PAL program website. Please note that the sample responses correspond to the tasks that are currently operational for PAL and do not reflect the updates to integrate the anti-racist leadership competencies. The samples available at this time provide information on how to structure your submission. Updated examples will be prepared prior to the operational launch of the updated PAL assessment.

Glossary

All students. Given that some student groups have been systematically underserved, and that any student can be particularly "vulnerable" at any moment in time, it is important to consider practices and outcomes beyond the aggregate to ensure that all students are challenged and supported to learn and grow. The phrase "all students" in this document refers to equity for and attention to students from all backgrounds and identities and experiences. These include but are not limited to all races and ethnicities, all genders and gender identities, all sexual orientations, all disabilities, all nationalities, all types of citizenship or immigration status, all religions, all family structures, all family housing situations, all medical/health needs, and all traumatic experiences.

Anti-racist leader. An anti-racist leader believes that racial groups are equals in all their differences and continually engages in self-reflective work that leads to educational policies, practices, conditions, and cultures that resist and dismantle inequities due to individual and systemic racism to advance racial equity.

Artifacts. Artifacts are primary sources of evidence created by the PAL candidate and required for scoring. Each task description designates required artifacts that are described in the *Candidate Assessment Handbook*. Examples include memos, reports, video recordings, completed templates, and proposals.

Bias. Bias is a disproportionate weight that may be created intentionally or unintentionally in favor of or against an idea, thing, individual, or group.

Blinding. Blinding is the required removal of all personally identifying information from all task submission files prior to uploading. This includes any information that may identify a candidate, district, school, university, students, faculty, and staff, as well as any person(s) who appear in videos.

Category documents. Category documents are required supporting documents (data reports, school improvement plans, surveys, agendas, etc.) that are specific to the task and category in which they have been collected or developed. Each task description in the *Candidate Assessment Handbook* defines the required category documents.

Collaboration. Candidates are encouraged to collaborate with others; however, each candidate must submit original work products, in their own words, including written artifacts and commentary, even when the work is created collaboratively. As required in the Rules of Assessment Participation 2.B.1, the candidate must identify any and all points of collaboration with any other individual(s), include the rationale or purpose of the collaboration, and clearly state their role in the collaboration and the role(s) of the collaborators. Appropriate

attribution(s) must be provided so that scorers are able to differentiate the candidate's original work from the work of others.

Commentary. A commentary is an original narrative written by the candidate in response to a series of prompts about the development of their leadership skills while completing each task. Commentaries are not intended to be collaborative but are an individual's reflections on leadership skills used to complete task work. Each task description in the *Candidate Assessment Handbook* includes directions and prompts for the commentary.

Culturally responsive. Cultural responsiveness is an approach to viewing students' culture and identity (including race, ethnicity, multilingualism, and other characteristics) as assets and creating learning experiences and environments that value and empower them.

Culturally and linguistically sustaining practice[9]

1) Affirms and values students' cultures, prior experiences, and linguistic resources to make learning more relevant and effective while building community and developing student agency.

2) Promotes teaching and learning principles of Culturally Relevant Pedagogy of academic achievement, cultural competence, and sociopolitical awareness; a framework that "not only addresses student achievement but also helps students accept and affirm their cultural identity while developing critical perspectives that challenge inequities that schools (and other institutions) perpetuate" (Ladson-Billings, 1995).

3) Values multilingualism as an asset and honors multilingual learners' languages to be leveraged, learned, and sustained through meaningful engagement in activities that are valued in their homes, schools, and communities.

Data analysis. Data analysis is a systematic process used to organize and evaluate data using analytic and logical reasoning for the purpose of uncovering useful information and gaining insights to solve a problem.

Data element. Data elements are the specific components that are collected, reviewed, and examined, such as measures of student performance in MCAS scores, attitudes and experiences in survey responses, attributes of classroom practices drawn from observations, participation rates, or attributes of student work. One or more data elements can be gathered from one data source.

Data source. A data source is the entity supplying the data, such as the Massachusetts

---

[9] For additional information, see Supporting Culturally and Linguistically Sustaining Practices.

Department of Elementary and Secondary Education (DESE) website for performance and demographic data, or individuals, such as educators, parents/guardians, students, and school leaders who provide information through surveys, interviews, and other types of data collection.

Disaggregated student data. Disaggregated student data refers to aggregate student data that are broken down into smaller parts in order to learn about the performance, opportunities, and outcomes of specific student populations (e.g., schools, grade levels, student groups). Extreme caution should be used when interpreting data for small numbers of students. Results reported for only a small number of students may not provide a valid indication of how such students typically perform.

Equity. Equity exists when one's identity (including but not limited to race, gender, ethnicity, language, disability, and ability) can no longer be used to predict social, economic, and educational outcomes. Enacting steps toward equity means ensuring that opportunities and supports to eliminate bias and structural barriers are operationalized at every level of the education system and society.

Educational equity means that all students have access to the educational resources, opportunities, and rigor they need at the right moment in their education across race, gender, ethnicity, language, disability, sexual orientation, family background, and/or family income to meet high expectations for cognitive, behavioral, and social-emotional growth and development.

Feedback. Feedback entails soliciting information from stakeholders about specific attributes of a plan, strategy, or experience, such as its quality, feasibility, and relevance to achieving the desired outcome. Feedback is not just an endorsement or agreement about a plan, strategy, or experience. The purpose of collecting feedback is to make revisions to the plan, strategy, or experience to improve the likelihood that it will accomplish the desired outcome.

Identity groups. Identity groups are groups in which individuals are members based on their social identity, which may include but are not limited to race, ethnicity, language, gender, gender identity, sexual orientation, or citizenship.

Inclusion. Inclusion is pursuing deliberate actions to create welcoming environments and ensuring that differences are actively sought and heard and that every individual feels a sense of belonging and a role in impacting decision making, practices, and policies.

Intersectionality. Intersectionality is the idea that people's various identities intersect in ways that impact how they are viewed, understood, and treated (first articulated by Kimberlé Crenshaw).

Priority academic area. A priority academic area is an area in which improved student performance is desired based on input from staff at the school and district levels and with attention to federally designated priority student groups or other groups that are a priority in the school. Candidates are required to provide evidence that demonstrates the chosen subject or performance area and target student group are priorities.

State and federal student accountability groups. State-designated student accountability groups include students who have been systematically marginalized or underserved by our education systems, including but not limited to those who identify as Black, Hispanic/Latino, Asian, Indigenous, or multiracial; students with disabilities; English Learners (EL); LG/FXE2 gs /FXE1 gs BTQ students; students experiencing homelessness and/or financial insecurity; and students who are undocumented. Federally designated groups include students with disabilities; English Learners (EL); African American, Hispanic, and Native American students; economically disadvantaged students; and students performing below state proficiency levels.

Strategy. A strategy is a new approach or modification of an existing approach aimed at achieving a desired outcome. Strategies are designed to address a specific measurable objective or measurable objectives that quantify the desired level of change. Strategies are composed of a series of steps, which specify the actions that need to be taken to effectively implement the strategy.

Student group. A student group is any group of students who share similar characteristics, such as racial or ethnic identification; gender identifications; socioeconomic statuses; physical or learning disabilities; or language skills. This includes, but is not limited to, the groups of students for which DESE issues annual performance determinations.

Systemically marginalized groups. Systemically marginalized groups are groups and communities that experience discrimination and exclusion on a systemic level because of unequal power relationships across economic, political, social, and cultural dimensions. These groups include but are not limited to race, culture, language, sexual orientation, gender identity, gender, and ability. Significant disparities exist for marginalized people.