Management Plan Rubric for Priority Improvement and Turnaround Schools & Districts

This rubric is intended to guide planning for Priority Improvement and Turnaround schools and districts proposing external management at the end of performance watch (C.R.S. § 22-11-209(2) & C.R.S. § 22-11-210(5)) or for early action. Under this pathway, a district may contract with a public or private entity (external to the school district itself) to partially or wholly manage one or more of the district's schools.. Management plans should be tailored to the unique needs and requirements of the district or school.

CDE staff will use this rubric to evaluate management plans for Priority Improvement and Turnaround schools and districts. The goal is to assess whether the plan, if implemented, can have a significant, rapid, and positive impact on student learning. *See* 1 CCR 301-1, Rules 7.04 & 10.04. CDE will also use this rubric to provide feedback to districts to help strengthen the quality of their plans.

This rubric is broken up into various parts. In prior end-of-clock hearings, districts proposing external management have presented to the State Board of Education either before or after finalizing a full contract and plan with an external manager. The following rubric has different parts that are used differently depending on how far along in planning and contracting the district is with an external manager. Below is a table detailing when and how to use each part.

Rubric Section	Purpose	Intended Plan Use
Part One: Management Plan Overview	Provides criteria for and feedback on a school or district's proposed management plan and chosen external manager.	For use with all plans. All submitted management plans will be evaluated utilizing Part One and must have an MOU.
Part One A: School/District Initial Plan Design	Provides criteria necessary for initial school or district plans	For use when initial plans have not been finalized. This may be when the district has identified a manager but has not yet developed a full plan with the manager or possibly finalized a contract. If a district is presenting a full plan and contract, Part One A will not be used.
Part Two: School/District Management Plan Design	Provides criteria for the evaluation of the detailed implementation plan proposed by the school, district, or external manager.	For use when full management plans are developed. The full plan will be evaluated using Part Two. Schools or districts that present partial plans during an end-of-clock hearing will later have their full plan evaluated by CDE once the full plan is developed.
Part Three: Management Contract	Provides criteria for the evaluation of the contract between the district and the external manager.	For use when full plans are developed. Schools or districts that present partial plans during an end-of-clock hearing will later have their full plan evaluated by CDE once the full plan is developed.

RUBRIC OVERVIEW AND SECTIONS

PART 1: Management Plan & Organization Overview	PART 2: School/District Management Plan Design

Management Plan Overview
    Need for external manager
    Mission & Vision
    District Systems
External Manager
    Selection Process
    Manager Track Record
    Scope of Work
    Student Learning Outcomes
    Implementation & Monitoring
	Instructional Transformation
	    School Calendar & Schedule
	    Instructional Vision
	    Curriculum
	    Assessments & Data
	    Individual Student Needs
	Talent Management
	    Recruitment & Hiring
	    Teacher & Staff Development
	    Evaluation & Retention
	    Compensation
	Culture & Climate Shift
	    Culture & Climate
	    Engaging Learning Environment
	    Stakeholder Engagement

PART 1a: School/District Initial Design Plan	**PART 3: Management Contract**

School/District Design Plan
    Instructional Infrastructure Draft
    Culture & Climate Shift Draft
    Talent Management Draft
	Performance Contract/MOU
	    Comprehensive Services
	    Responsibilities, Rights, & Authorities
	    Accountability for Student Achievement
	    Dispute Resolution, Breach of Contract, and Termination

PART 1: Management Plan & Organization Overview

For use with all plans. All submitted management plans will be evaluated utilizing Part One and must have an MOU.

Management Plan Overview	□ Meets expectations □ Needs revisions □ Does not meet expectations	
Plan Component	**Rating of Evidence**	**Comments**
Need for external manager	**Meets Expectations**	**Comments**
Plan provides a clear and compelling rationale for pursuing an external manager.	• Provides clear rationale for why the district is selecting the management accountability clock pathway for the identified Priority Improvement/Turnaround school(s) or district as opposed to the other pathway routes available. • Gives in-depth description of the district and/or school's most pressing areas of need that the external manager will help address and support. • Explicitly explains how an external manager will result in a greater level of success for student learning.	
Mission & Vision	**Meets Expectations**	**Comments**
Plan articulates a vision and mission that reflects high expectations for student learning and sets goals for improving academic outcomes.	• States a mission and vision that provides a clear and concise picture of what the school/district aims to achieve. • Demonstrates how the external manager will help the school/district advance its vision and mission. • Identifies actionable goals for student academic achievement. • Establishes a vision for how the school/district will improve student outcomes.	
District Systems	**Meets Expectations**	**Comments**
Plan describes district flexibilities and resources that will be granted to allow for the agreed upon scope of work.	• Describes any flexibility or changes in district policies and practices that will be granted to the school(s) as a result of external management.	

	• Outlines the district's plan for providing differentiated support to the school(s), including changes to organizational structures, routines, or systems. • Describes the district's plan or changes in allocating resources (financial or personnel) to ensure the success of the management plan.	
External Manager	□ Meets expectations □ Needs revisions □ Does not meet expectations	
Plan Component	**Rating of Evidence**	**Comments**
Selection Process	**Meets Expectations**	**Comments**
Plan describes the process the district used to select the partner and ensures the external manager has a track record of success in supporting schools in identified areas of need.	• Describes a rigorous process of recruitment, vetting and selection of the external manager. • Includes a district RFI/RFQ process that outlines key criteria and look-fors in a manager. • Includes a selection process that requires verifiable, quantitative data that demonstrates the partner's past effectiveness in improvement in schools with similar needs and similar demographics.	
Manager Track Record	**Meets Expectations**	**Comments**
Plan describes the external manager's track record for success	• Summarizes the external manager's qualifications, services, and rationale for selection by the district. • Provides a specific, quantifiable track record of work and outcomes from previous work by the external manager, particularly highlighting work in similar circumstances to the current challenge.	
Scope of Work	**Meets Expectations**	**Comments**
Plan describes one or more targeted areas the external manager will focus on in the district/school and provides a	• Includes a clear and concise overview of the scope of services to be implemented by the external manager specifically describing the external manager's role in providing both accountability and support to the	

	district/school(s) in implementing the programming outlined under Instructional Transformation, Talent Management, and Culture and Climate. As detailed below, articulates clear delegation of authority to the external manager in identified areas. • Provides detailed explanation of why the agreed upon targeted areas for accountability and support for the school/district were selected. • Where appropriate, names and qualifications of key staff members from the management organization who will be assigned to the school/district are provided. • Justifies why the scope of work is appropriate given school/district needs (e.g., if only seeking a targeted management agreement, why and how is the targeted approach appropriate?). • Articulates how the manager's services and approach will align to and support current district needs. Explains how the manager will directly support the school or district's plan for improvement. • Includes a timeline that thoroughly outlines implementation of the scope of services. Plan should be practical but also demonstrate urgency for pulling the school/district off the accountability clock	
timeline for the implementation.		
Student Learning Outcomes	**Meets Expectations**	**Comments**
Management Plan thoroughly describes the goals and specific gains in academic achievement the school will commit to as a result of the plan. Articulates clear	• Identifies actionable goals for student academic achievement. • Gives in-depth explanation for how the plan will improve student learning.	

measures for monitoring learning outcomes.	• Explains how student learning and performance will be comprehensively measured by multiple sources of evidence and data. • Identifies student outcomes that are clearly aligned to the mission and vision of the plan.	
Implementation & Monitoring	**Meets Expectations**	**Comments**
Includes timeline for implementation and how the school will monitor the implementation of the management plan.	• Includes a timeline that thoroughly outlines a plan for implementation including key actions with timeframes. • Includes specific implementation benchmarks at regular intervals (at least semi-annually) which identify systems-level implementation progress goals aligned to the plan. • Describes how the school leadership team will regularly monitor and adjust the school's plan based on implementation versus specified benchmarks.	

PART 1a: School/District Initial Design Plan

For use when initial plans have not been finalized. This may be when the district has identified a manager but has not yet developed a full plan with the manager or possibly finalized a contract. If a district is presenting a full plan and contract, Part One A will not be used.

School/District Design Plan	☐ Meets expectations ☐ Needs revisions ☐ Does not meet expectations	
Plan Component	**Rating of Evidence**	**Comments**
Instructional Infrastructure Draft	**Meets Expectations**	**Comments**
Plan articulates what strategies the school and/or district will focus on that are related to academic systems. Such strategies may address: ● Time ● Curriculum & instruction ● Assessments & data ● Special populations	For schools or districts implementing changes to instructional infrastructure, please address the following elements. If a school or district is not making changes in these areas, provide rationale for not making changes. ● Articulates proposed changes to curriculum and instruction at the school in response to school needs. Discusses any special academic/curricular themes and addresses how the chosen curriculum and instructional methods are expected to improve school performance and student achievement, and are necessary for the school to achieve its mission. ● Provides an overview of the school's proposed assessment plan, including a description of any assessments that will supplement those required by the district and the state. ● Describes the school's approach to provide personalized and differentiated instruction that best meets the needs of all students, especially students with disabilities and multilingual learners. ● Describes what changes to the school schedule or calendar will occur and articulates how the changes will address current barriers and lead to increased student achievement.	

Culture & Climate Shift Draft	Meets Expectations	Comments
Plan articulates what culture and climate strategies the school or district will focus on.	For schools or districts implementing changes to school culture, please address the following elements. If a school or district is not making changes in these areas, provide rationale for not making changes. ● Articulates changes to the systems, programs, structures, rituals, and routines the school will use to foster a positive school culture for all students and teachers. ● Describes plan to engage regularly, frequently, and effectively with parents and guardians, external stakeholders, and the community at large.	
Talent Management Draft	**Meets Expectations**	**Comments**
Plan articulates what strategies the school or district will focus on that are related to talent management.	For schools or districts implementing changes to talent management systems, please address the following elements. If a school or district is not making changes in these areas, provide rationale for not making changes. ● Provides an overview of the school's recruitment and staffing plan and how these changes will produce gains in academic achievement. ● Explains how plans for professional development differ from the school's current practice and/or district requirements and why these changes are necessary. ● Describes changes to the processes and criteria used to support the strategic evaluation and retention of highly effective teachers and staff, including incentives and compensation.	

PART 2: School/District Management Plan Design

For use when full management plans are developed. The full plan will be evaluated using Part Two. Schools or districts that present partial plans during an end-of-clock hearing will later have their full plan evaluated by CDE once the full plan is developed.

Instructional Transformation	□ Meets expectations □ Needs revisions □ Does not meet expectations	
Plan Component	**Rating of Evidence**	**Comments**
School Calendar & Schedule	**Meets Expectations**	**Comments**
Plan articulates any proposed changes to the school calendar and schedule, which may include changes to: • Length of school day/year • School calendar • Hours of instruction • Number of work days	• Clearly describes what changes to the school schedule or calendar will occur and articulates how the changes will address current barriers and lead to increased student achievement. • Provides copies of the school calendar and daily schedules as an attachment to the Management Plan. • Explains how the daily schedule maximizes instructional time with an emphasis on core subject areas for all students. • Includes a schedule that ensures students have adequate access to grade level instruction, and intervention is used as a way to support that access, instead of a barrier to meeting grade level expectations. • Includes a schedule that is designed to meet teacher development and preparation needs by including adequate time for teacher planning, teacher professional learning, and teacher collaboration. • Includes a daily schedule and annual calendar that reflect the school's mission and vision. • Identifies the total number of days and hours of instruction students will receive and the number of in-service days for teachers, how those hours and days compare to the prior school year and/or other schools in the district, and the rationale for similarities and differences.	

	• Identifies the minimum number of hours/minutes per day and week that the school will devote to academic instruction for core subjects in each grade. • Identifies available opportunities for extended instructional time and explains how that time will be strategically structured and allocated.	
Instructional Vision	**Meets Expectations**	**Comments**
Plan articulates proposed vision for instruction	• Describes the vision for instruction across the school, how that vision is aligned to the school's mission and vision, and how it will support academic achievement for all students. • Identifies a consistent set of evidence-based non-negotiable practices to be implemented across all classrooms at the school and are aligned to the school's mission and vision. • Describes the resources and supports for teacher planning and intellectual preparation aligned to the school's mission and vision.	
Curriculum	**Meets Expectations**	**Comments**
Plan articulates any proposed changes to curriculum.	• Discusses any special academic/curricular themes the school will feature, if any. • Clearly describes how the chosen curricula and instructional methods are aligned to grade-level standards and expected to improve school performance and student achievement. • If seeking curricular autonomy, explains why the proposed educational program is more likely to succeed in the school. • Includes evidence that the curriculum is research-based and has delivered or will deliver rigorous, engaging and effective instruction for the student population and boost student achievement.	

	• Describes the instructional materials and resources that the school will use to support its curriculum and explains how they are aligned with the Colorado Academic Standards and the mission and vision of the school.	
Assessments & Data	**Meets Expectations**	**Comments**
Plan explains student assessments and data systems, including progress monitoring, data-driven practices, and differentiated instruction.	• Provides an overview of the school's proposed assessment plan, including a description of any assessments that will supplement those required by the district and the state, if applicable. • Demonstrates that the assessment system is aligned with learning expectations of the Colorado Academic Standards and will yield reliable, valid and timely information to allow for (1) leadership progress monitoring of the instructional program, and (2) teacher action planning for student instructional needs in ELA and math. • Explains any changes to *how* and *how frequently* the school will collect and analyze student academic achievement data, use the data to refine and improve instruction, and report the data to the school community. • Provides an overview of how the external manager will manage their data systems independently, if applicable. • Describes the school's approach to provide personalized and differentiated instruction that best meets the needs of all students. Includes explanation of how staff will use students' formative assessment data to inform and differentiate instruction. • Describes how collaborative structures will support staff collaboration to maximize time to improve teacher practice and student outcomes.	

	• Explains how the school's leadership team will regularly use assessment data on a cyclical basis to make adjustments to school programming and structures to better improve outcomes for all students. • Explains how the school will monitor data consistently including considerations of equitable outcomes for traditionally underserved students.	
Individual Student Needs	**Meets Expectations**	**Comments**
Plan articulates how the school will support individual student needs.	• Describes a problem-solving process, as part of a larger MTSS approach, to identify students for behavior and academic intervention using valid data and a plan with clear criteria and protocols to accelerate growth. • Provides an overview of how the school model will support students with disabilities, students with special education needs, multilingual learners, gifted and talented students, and other special populations.	
Talent Management	☐ Meets expectations ☐ Needs revisions ☐ Does not meet expectations	
Plan Component	**Rating of Evidence**	**Comments**
Recruitment & Hiring	**Meets Expectations**	**Comments**
Plan articulates any proposed changes to recruitment and hiring processes.	• Details the strategies the external manager/school will use to attract and recruit highly-effective, culturally-competent teachers and staff, particularly in hard to fill positions. • Describes the talent selection model and criteria, including the cultural competencies required for staff to support the student population and management plan. • Explains the overall hiring process steps and timeline. • Includes description of the flexibilities required to hire outside of district processes and timelines.	

Teacher & Staff Development	Meets Expectations	Comments
Plan articulates the plans for the school's professional development plan, including: • Teacher development and coaching content • Frequency and timing of PD and coaching opportunities • Beginning of year teacher orientation • Onboarding process for new staff	• Describes the professional development opportunities that will be offered to the teaching staff, at the start of an academic year, and throughout the year. • Describes the frequency, focus, and type of teacher coaching and other supports designed to increase teacher implementation of expectations and effectiveness of instruction across the school. • Explains how plans for professional development differ from the school's current practice and/or district requirements and why these changes are necessary. • Describes how the school's professional development plan aligns to the school's mission and vision and will lead to increased student achievement. • Details the onboarding process the school will take to prepare incoming new teachers and ensure new staff understand the school's mission, instructional vision, and priorities before the school year starts. • Identifies the expected number of days/hours for professional development throughout the school year and explains how the school's calendar, daily schedule, and staffing plan will be structured to accommodate this plan. • Notes when teachers will have time for common planning or collaboration, and how such time will typically be used. • Describes how leadership will be distributed to support teacher leadership.	

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Evaluation & Retention	Meets Expectations	Comments
Plan describes the school's evaluation and retention processes.	• Provides examples of frameworks, standards, and practices that will be used to evaluate teachers. Specifically addresses what role student progress and achievement will play in teacher evaluations. • Articulates strategies to promote retention of the best performing teachers. • Specifies steps or actions the school will take when teacher or leader performance is unsatisfactory. • Describes how a performance management system will be used to drive improvements in teacher effectiveness and student achievement.	
Compensation	**Meets Expectations**	**Comments**
Plan explains any changes being made to the school's compensation system.	• Describes any changes in the school's compensation system and how these changes and the rationale to these changes. • Outlines any incentive or reward programs and how they align with the vision and mission of the school.	

Culture & Climate Shift	□ Meets expectations □ Needs revisions □ Does not meet expectations	
Plan Component	**Rating of Evidence**	**Comments**
Culture & Climate	**Meets Expectations**	**Comments**
Plan articulates any changes being proposed to foster a positive school culture.	• Describes in detail any changes to the systems, programs, structures, rituals, and routines the school will use to foster a positive school culture for all students and teachers. • Identifies attendance policy and expectations aligned to the school's mission and vision and how those expectations will support all students attending and engaging in school.	

	• Identifies a culturally-responsive code of conduct and disciplinary procedures aligned to the school's mission and vision that will support all students' success. • Describes the wraparound services provided by the school aligned to the school's mission and vision.		
Engaging Learning Environment	**Meets Expectations**	**Comments**	
Plan articulates any changes being proposed to foster an environment with a positive school culture.	• Describes in detail any changes to the systems, programs, structures, rituals, and routines the school will use to foster a positive school culture and create a culture that is welcoming to all students and teachers. • Explains the school's vision for clearly defined student engagement during class time and how faculty and staff will be trained and coached in meeting the school's vision. • Describes how all staff will be equipped with strategies to foster strong student engagement to ensure that minimal time will be spent redirecting students.		
Stakeholder Engagement	**Meets Expectations**	**Comments**	
Plan includes a variety of strategies to engage key stakeholders in areas of support, events, and communication.	• Includes a highly developed plan for collaboration and partnerships directly linked to school strategies and sets forth a robust plan for parent engagement. Describes how those changes will increase learning outcomes for children. • *Communication*: Explains how staff regularly will engage in meaningful communication with all families about students' academic and social progress and how to support students at home, providing translation as necessary. • *Support*: Describes how the school will strategically include parents/guardians and community members in cultivating a culture of high expectations for students' learning and their consistent support of students' efforts.		

	• *Events*: Includes a plan for the school to invite family and community participation in school activities that are related to school performance goals while taking proactive actions to ensure that language and culture barriers do not reduce participation of different groups of students.	

PART 3: Management Contract

For use when full plans are developed. Schools or districts that present partial plans during an end-of-clock hearing will later have their full plan evaluated by CDE once the full plan is developed.

The plan should include a copy of the proposed contract/MOU between the district and the external manager. A contract/MOU that meets expectations will clearly outline the terms of the performance partnership, including the following components. If a contract/MOU does not address one of the components, please provide a rationale for not including it in the contract/MOU.

Performance Contract/MOU	□ Meets expectations □ Needs revisions □ Does not meet expectations	
Comprehensive Services	**Meets Expectations**	**Comments**
The district and external manager should enter into a comprehensive performance contract/memorandum of understanding (MOU) that specifically outlines the terms of the performance partnership.	• States length of contract (suggested to be 2-4 years or to align with State Board order for directed action) with annual formal review of contract performance by both parties. • Describes management fees, budget autonomy, fundraising, and any resources necessary to sustain the partnership for the duration of the contract. • Describes relevant responsibility and/or decision-making authority for Non-Academic Operations (e.g., communications, facilities, maintenance and operations, accounting, payroll and HR, technology, dining services, transportation, school security, procurement).	
Responsibilities, Rights, & Authorities	**Meets Expectations**	**Comments**
Management contract clearly delineates responsibilities, rights and authorities of external manager and the district.	• Articulates what specific decision-making authority the manager will hold in each of the four domains (Talent, Instructional Transformation, Culture and Climate, and Leadership) and how that will be significant and meaningful to addressing the identified school/district needs. • Articulates the external manager's rights and responsibilities aligned to the autonomies and strategies specified in the	

	school design plan in the areas of academic systems, talent management, leadership, and culture. • Establishes clear lines of reporting and supervision. Clearly defines the role of the superintendent and local board in oversight of the work. • Identifies district contact responsible for ensuring oversight of the management contract. • Clearly articulates the number and qualifications of manager staff who will be embedded within the district or school(s) and articulates their roles and responsibilities.	
Accountability for Student Achievement	**Meets Expectations**	**Comments**
Management contract includes specific performance targets.	• Sets performance targets, metrics, and a plan to monitor progress through data review including timelines, data elements, responsibilities of each party.	
Dispute Resolution, Breach of Contract, and Termination	**Meets Expectations**	**Comments**
Management contract clearly delineates the processes to be followed in any disputes between parties subject to the contract.	● Identifies supports and interventions for deviating performance, and remedies available to either party if there is failure to make reasonable progress toward mutually agreed-upon performance benchmarks. ● Clearly defines the process the district and manager will follow in the case of disagreements of judgment or scope of work as outlined in contract/MOU. ● Clearly defines the protocols and timelines for either party in initiating and responding to breach of contract/MOU including: notification, negotiating corrective action, and responding to failure to remedy. ● Clearly defines the process and terms for termination of the MOU/contract initiated by either the district or the external manager.	

CDE Summary of Plan Review

Part	Plan Section	Overall Rating	Evidence & Rationale
Part 1	Management Plan Overview		
	External Manager		
Part 1A	School/District Design Plan		
Part 2	Instructional Transformation		
	Talent Management		
	Culture & Climate Shift		
Part 3	Management Contract		

Summary Evaluation	Overall Rationale
☐ CDE has determined that the proposed Plan meets the expectations of rigorous standards and, if implemented as described, can have significant, urgent, and positive impact on student learning.	
☐ CDE has determined that the proposed Plan meets most of the the expectations of rigorous standards and/or, has most components of an effective implementation plan. If both are addressed, the plan can have a positive impact on student learning.	
☐ CDE has determined that the proposed Plan needs substantive revisions in order to meet the expectations described above.	
☐ CDE has determined that the currently proposed Plan is not sufficient to meet the expectations described above.	