



Form C: School Holistic Review and Improvement Planning Rubric

Essential Components	RFI Questions	Level A (fully meets/exceeds)
Intro to Services	C.0. Provide a 2-3 sentence summary introduction to your holistic review and improvement planning services	Not scored - informational only
Description of overall approach to Holistic Review and Improvement planning	<p>C1. How does your organization approach Holistic Review and/or Improvement Planning support for schools/districts? (Include both Theory of Action and scope and sequence of work.)</p> <p>C2. Does your organization have any areas of specialized expertise that you would bring to a Holistic Review or Improvement Planning support?</p>	<p>C1.a. The provider's theory of action is grounded in evidence and is specifically aligned to implementing strong Four Domains-aligned systems and structures and focuses on sustainability within schools</p> <p>C1.b. The provider's scope and sequence of work includes a timeline and description of activities and how those activities are linked to expected outputs or work products</p> <p>C2. Informational only - not scored</p>
Holistic review	<p>C3. What is your process for conducting a holistic review?</p> <p>C4. What types of data (systems, stakeholder, and student level) are typically included in your holistic review process and report?</p> <p>C5. How do you prepare, engage and follow-up with stakeholders in a holistic review?</p>	<p>C3.a. The provider's response outlines a coherent process for collecting data on school systems (operations, instructional approach, assessment, climate/culture, etc. - aligned to four domains), including</p> <ul style="list-style-type: none"> - materials audits, - observations, - interviews/surveys, - data analysis (student and systems data) <p>C4.a. The provider outlines an approach to collecting stakeholder feedback that</p> <ul style="list-style-type: none"> - is grounded in research-based framework for family-school partnerships - includes any prep/information that stakeholders need to provide meaningful input. - clearly outlines all the prep needed prior to asking for input. <p>C4.b. and C5.a. The provider's approach produces a report that</p>



		<ul style="list-style-type: none"> - presents a holistic, concise overview of the system, - identifies strengths in school's approach, - identifies areas of student performance needs and school systems needs - gives recommendations for how to prioritize these areas of need for specific improvement <p>C5.b. The provider outlines a plan for presenting findings to the school team and disseminating the findings broadly</p>
Improvement planning for implementation	<p>C6. How do you determine what strategies are most likely to improve outcomes for students? How do you ensure the strategies selected are grounded in evidence?</p> <p>C7. How do you recruit, prepare, engage and follow-up with diverse stakeholders in the improvement planning process? How do you ensure that stakeholders included in the improvement planning process are representative of the school's student population?</p> <p>C8. What is your approach to supporting planning for effective implementation of strategies?</p>	<p>C6.a. The provider demonstrates that strategies they recommend are research based and are appropriate for the results of the review. Strategies target the gaps and priorities identified in the holistic review and are appropriate for the context and/or stakeholder input.</p> <p>C7.a. The provider demonstrates how representative stakeholders will be meaningfully involved in improvement planning.</p> <p>C8.a. The provider articulates clear phases of implementation, including change management, professional development/coaching, systems adjustments and implementation benchmarks, and calls out the resources required for implementing with fidelity (e.g., funding, staffing required).</p> <p>C8.b. It is clear from provider's response how implementation plan could be housed in the UIP template or a template that can easily be captured in the UIP template, such as a 90 day plan or performance management tool.</p>
Anticipated impact and/or track record of success	<p>C9. How do you determine the success and/or impact of your review and planning processes? If this process is new to your organization, how will you determine the success or impact of your review and planning processes?</p> <p>C10.a. Submit 1-3 work product(s) that highlight your organization's</p>	<p>C9.a. The provider's response includes a clear definition of how they measure success in their holistic review and improvement planning processes and how they evaluate that success. Examples might include:</p> <ul style="list-style-type: none"> • client satisfaction (including data if applicable), • completion of promised work products, • evidence of how work products informed school actions



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	<p>approach to the planning process. Sample work products may include systems/data review protocols and should include at least one example of a final diagnostic report and/or implementation plan (see Appendix A for guidance on annotating work products).</p>	<p>C10.a. The provider includes specific examples of holistic reviews and improvement planning processes they have led, or a coherent and comprehensive outline of the anticipated process for evaluating the impact of the review process, including</p> <ul style="list-style-type: none">• specific contexts,• outcomes of the planning process, and• sample work products that are annotated to demonstrate alignment to RFI quality criteria.
References	<p>Please submit the name and contact information (phone and email) for the last three schools or districts with whom your organization contracted. References will be contacted by CDE staff.</p>	<p>References are used as part of the body of evidence to assess capacity throughout the provider application</p>