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| Calibrating Feedback  A Model for Establishing Consistent Expectations of Educator Practice  Adapted from the Massachusetts Candidate Assessment of Performance  Facilitator’s Guide |
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# Preparing for the Workshop

## Overview

This workshop provides an overview of the ESE Model CAP Observation Protocol used in the [Candidate Assessment of Performance (CAP)](http://www.doe.mass.edu/edprep/cap/), as well as opportunities to practice conducting observations and constructing feedback and calibrating evidence and feedback with colleagues. Districts and schools may find the Model CAP Observation Protocol and the calibration activities included in this workshop helpful to developing common expectations for educator practice, as well as practicing conducting observations and providing feedback. The goal of this workshop is to build capacity for delivering high-quality, targeted, and actionable feedback to educators grounded in evidence collected during observations.

## Context

This facilitator’s guide is designed to assist districts in delivering a rich and engaging training experience for evaluators and educators. The content of this workshop is based on the [CAP Model Observation Protocol](http://bit.ly/1Wi55Dn). Districts may substitute the model protocol and instead facilitate the workshop using one of their own . In all cases, districts should review this guide and the other workshop materials carefully to determine where they will need to be customized to reflect the district’s expectations and process for conducting observations and providing feedback.

## Intended Outcomes

At the end of this session:

* Participants will have a clear understanding of the Model CAP Observation Protocol (or whatever protocol is used in its place), including the process for collecting and organizing evidence and providing high-quality, targeted, and actionable feedback to educators.
* Participants will have practiced conducting an observation and constructing feedback.
* Participants will have a clear understanding of calibration and have engaged in a calibration activity to begin to develop a common set of expectations for educator practice.

Equipment and Materials

* Equipment: Laptop computer with an internet connection and a copy of the workshop PowerPoint slides and a projector.
* Handouts packet, which includes:
  + ESE Model CAP Observation Protocol
  + CAP Observation Forms
* Teacher Performance Rubric (not included)

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# Facilitator’s Guide

This workshop is divided into five sections and has a total time of 2 hours and 10 minutes:

## Warming Up (10 minutes)

## Learning (30 minutes)

## Practicing (45 minutes)

## Calibrating (45 minutes)

## Recapping (5 minutes)

Slides are provided to facilitate each section and this corresponding guide includes facilitator notes, as well as *italicized* talking points for each slide.

***Note:* Facilitators may opt to omit the Learning section to reduce total workshop time to roughly 1 hour and 45 minutes, if participants will be using a familiar observation protocol to complete the activities.**

## I. Warming Up (10 minutes)

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| Title slide   * This workshop is designed to be delivered to a group of evaluators and/or educators. Portions of the workshop are based on the Model CAP Observation Protocol. Districts are free to customize the content as needed to reflect their expectations and processes for conducting observations and providing feedback. | Calibrating Feedback A Model for Establishing Consistent Expectations of Educator Practice   Adapted from the MA Candidate Assessment of Performance Slide 1  Quick transition |
| Warming Up:   * This workshop is broken up into the following sections Warming Up, Learning, Practicing, Calibrating, and Recapping. | Warming UpSlide 2  Quick transition |
| Warming Up:   * The video clip featured on this slide is from the [Transforming Educator Evaluation in Massachusetts (TEEM) series](http://www.doe.mass.edu/edeval/resources/teem/default.html). The TEEM videos feature educators from four MA districts describing strategies for creating meaningful, high quality educator evaluation experiences This video on Observations and Feedback is a good primer to help participants reflect on their observation practices. * Click on the screenshot in presentation mode to launch the 5-minute video clip. | Learn from MA Teachers and Administrators about Observations and Feedback Video on Observations and FeedbackSlide 3  5 minutes |
| Warming Up:   * Push participants to be specific about their current processes for determining what feedback to offer those they observe. * Participants will likely have a range of experiences and preferences conducting observations and providing feedback. Facilitators may find it helpful to surface these differences by adding a whole-group share to the warm up activity. | Warm Up Turn to a partner: What resonated with you? How do you currently conduct classroom observations (e.g., mostly short, unannounced; mostly longer, announced; using video; with a rubric)? How do you determine what feedback to provide following an observation? Slide 4  5 minutes |

II. Learning (30 minutes)

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| Learning:   * In this section, participants will learn how observations are used in CAP, the CAP Model Observation Protocol, and the CAP Observation Forms. | Learning:  Observations in CAP Slide 5  Quick Transition |
| Learning:   * *The protocol used in this workshop was created to support the Candidate Assessment of Performance, or CAP. CAP is a performance assessment designed to asses a teacher candidate’s readiness to teach. Starting in 2016-17, successful completion of CAP will be a requirement for educator preparation program completers.* * *CAP is aligned to the MA Educator Evaluation Framework. Now, pre-service teachers participate in the very same 5-step cycle as in-service educators to support their growth and development.* * *Like the educator evaluation framework, CAP relies on observations as a main source of evidence.* | Candidate Assessment of Performance  This model for conducting observations and calibrating feedback has been adapted from the MA Candidate Assessment of Performance (CAP).  CAP is aligned to the MA Educator Evaluation Framework and occurs throughout the pre-service practicum experience.  Learn more at the CAP website: http://www.doe.mass.edu/edprep/cap/.  Slide 6  1 minute |
| Learning:   * *During the observation, evaluators should be focused on documenting what is happening by recording teacher and student behaviors and actions. This is called active evidence collection.* * *After the observation, the evaluator will analyze the evidence collected, extract trends and draw conclusions.* * *The educator should also reflect on his/her performance during the lesson and share the reflection with the evaluator. This is an important step in cultivating reflective practice.* * *Finally, the observation should result in targeted feedback for the educator in the form of specific areas of reinforcement and refinement, which will be covered in depth later.* | Components of a CAP Observation Active evidence collection occurs during the observation DO document what is happening (e.g., educator and student actions/behaviors). DO NOT make judgments about performance during the observation.  Analysis and synthesis of evidence occurs after the observation.  Evidence is sorted and connected to elements of the rubric. Focus elements are identified for each observation. Self-reflection by the educator occurs before educator receives feedback. Evaluators provide targeted feedback to the educator in the form of areas of reinforcement and areas of refinement. Slide 7  3 minutes |
| Learning:   * Slides 8-13 unpack the Model CAP Observation Protocol. Districts using a different protocol should adapt this content as needed. * *Here are the main components of the Model CAP Observation Protocol. The next several slides unpack the protocol.* * *Note that part 1, Before the Observation, is omitted for unannounced observations.* * Refer participants to the **ESE Model Observation Protocol included in the handouts packet (pages 4-9)**. | ESE's Model CAP Observation Protocol  Before the Observation (for announced observations) Preparing for the pre-conference Conducting the pre-conference  During the Observation Actively collecting evidence  After the Observation Analyzing the evidence Preparing for the post-conference Identifying reinforcement/refinement objectives Conducting the post-conference Slide 8  Quick Transition |
| Learning:   * *The pre-conference can be an important opportunity to build rapport with the educator, establish a coaching relationship, and begin to collect evidence for the upcoming observation.* * *It should occur 1-2 days prior to an announced observation. Plan for 15-20 minutes.* * *Prior to the pre-conference program observers should gather and review evidence including: the lesson plan and lesson materials and prior feedback provided to candidate.* * *Observers should keep the pre-conference conversation focused by preparing 2-3 questions for the educator. The model protocol includes additional example questions. See page 5 of the handouts packet.* * **Review pages 5-6 of the handouts packet** with participants, which cover a three-step outline for the pre-conference: introduction, lesson discussion, closure from the CAP Model Observation Protocol. | Model Protocol: Before the Observation Pre-Conference (1-2 days prior to announced observation – 20 min) Gather evidence such as lesson plans and materials in advance Prepare 2-3 questions for pre-conference to better understand lesson plans and collect additional evidence, such as: “What do you expect students to know and be able to do at the end of the lesson?”  “How is the lesson structured for students who progress at different learning rates?” Let the educator do most of the talking, but do help him/her reflect prior feedback when possible.  Slide 9  4 minutes |
| Learning:   * *During the observation, the observer engages in active evidence collection, documenting what is happening by recording teacher and student actions and behaviors.* * *At this point, judgment should be withheld.* * *Scripting portions of the lesson may be a helpful way to collect evidence.* * *Observers will have an opportunity to polish and sort evidence after the observation.* | Slide 10  Model Protocol: During the Observation  Actively collect evidence without making judgments Options: scripting, videotaping, audio-recording  Evidence collected during an observation is to aid the evaluator in identifying trends and selecting illustrative examples. 2 minutes |
| Learning:   * Refer participants to the **CAP Observation Form included in the handouts packet (page 10).** * Note that not all evidence collected must be sorted. * *Evidence statements should say what happened in the observation that shows or does not show that a skill has been demonstrated. For example, an evidence statement in the II.A.3 Meeting Diverse Needs category might read, “Met diverse needs by circulating to each group during group work, asking probing questions and checking for understanding. However, neither groupings nor questioning was differentiated based on individual student need (not noted in lesson plans or during pre/post conferences).”* | Model Protocol: After the Observation  Review evidence and sort using the evidence chart included on the CAP Observation Form. Not every piece of evidence collected needs to be sorted. Consult the rubric when sorting evidence. Evidence statements should say what happened in the observation that shows/does not show that a skill has been demonstrated. Slide 11  4 minutes |
| Learning:   * Refer participants to the **Post-Conference Planning Form from the model observation protocol included in the handouts packet (page 13) and let them know that they will be working with this form later in the workshop.** * *Once the evidence has been analyzed and synthesized using the observation form, it is time to plan for the post-conference. The Post-Conference Planning Form may be helpful here.* * *As a first step, if the observation was conducted jointly, it’s important for the observers to calibrate feedback prior to the post-conference.* * *Next, the observers should collect a self-reflection from the educator (again, a good source of evidence for the reflective practice element).* * *Finally, the observers identify at least 1-2 areas of reinforcement and 1-2 areas of refinement to share as feedback to the candidate during the post-conference.* | Model Protocol: After the Observation  Prepare for the post-conference. If conducted jointly, the observers should calibrate feedback before the post-conference.  Collect self-reflection from educator  Identify 1-2 areas of reinforcement (“keep doing what you’re doing”)   Should identify educator’s instructional strength in a way that encourages continuation of effective practices. Identify 1-2 areas of refinement (“instead, try this…”) Should identify areas in need of instructional improvement. Slide 12  5 minutes |
| Learning:   * *During the post-conference, the observer will provide the educator with the completed observation form and talk through the feedback and available supports, asking reflection questions throughout.* * **Review pages 8 and 9 of the handouts packet** withparticipants, which cover a three-step outline for the post-conference: introduction, discussion of reinforcement/refinement areas, closure. | Model Protocol: After the Observation Conduct the post-conference. (30 minutes) Post-conferences should occur after the evaluator has had an opportunity to synthesize the evidence. Ask the educator self-reflection questions related to areas of refinement (good source of evidence for the reflective practice element). Provide concrete suggestions for improvement and share resources/supports. Share observation form. Answer questions and confirm next steps. Slide 13  3 minutes |
| III. Practicing (45 minutes) | |
| Practicing:   * In this section, participants will watch a video of instructional practice and practice conducting an observation and developing feedback using the Model CAP Observation Protocol (notably the Post-Conference Planning Form). * Again, districts may choose to modify this activity to the reflect their chosen observation process. | Practicing Slide 14  Quick Transition |
| Practicing:   * Prepare participants to conduct a simulated unannounced observation. Participants should use a strategy such as scripting on notepaper to thoroughly capture teacher and student actions and behaviors without judgment. * Provide participants with a few minutes to review the performance descriptors for the focus elements for the observation. Using focus elements for this workshop will result in a more meaningful conversation because all participants are looking for the same practices. Facilitators may choose to substitute the focus elements for elements that better align to district/school priorities or can leave them in place for the purposes of this exercise. * *Note the focus elements for this lesson are well-structured lessons and safe-learning environment, the same as Unannounced Observation #1 in CAP.* | Simulatd Unannounced Observation  In a moment we will watch a video of a 7th grade math lesson.  “Observe” the lesson using ESE’s Model CAP Observation Protocol. Remember, engage in active evidence collection by recording educator and student actions and behaviors without judgment.  The focus elements for this lesson are: well-structured lessons and safe learning environment.  Slide 15  3 minute |
| Practicing:   * The video clip featured on this slide is from the ESE’s [Calibration Video Library](http://www.doe.mass.edu/edeval/resources/calibration/). The teacher practice depicted in the series is intentionally variable in quality to promote robust conversations. * Click on the screenshot in presentation mode to launch the video clip. * Stop the video at the 9:52 mark. | Video for simulated unnanounced observationsSlide 16  10 minutes |
| Practicing:   * Refer participants to the **rubric (not provided in the handouts packet) and CAP Observation Form for Unannounced Observation #1 on page 12 of the handouts packet.** * Note that the observation form reflects the six elements from the rubric measured by CAP. Facilitators may decide to substitute these for different elements to better align to district/school priorities or can leave them in place for the purposes of this exercise, or limit the scope of the observation to just the two focus elements. * Each participant should work independently for 10 minutes using the rubric and observation form to sort the evidence collected by the rubric element, and identify 1-2 reinforcement and 1-2 refinement areas. Cap the activity at 10 minutes and inform participants that it’s ok if they do not complete the process in the time allotted. | Simulated Unannounced Observation  Analyzing the Evidence Using the observation form and the rubric, sort evidence into the evidence chart. Not every piece of evidence collected needs to be sorted. Evidence statements should say what happened in the observation that shows/does not show that a skill has been demonstrated. Slide 17  12 minutes |
| Practicing:   * Refer participants to the **Post-Conference Planning Form from the Model Observation Protocol included in the handouts packet (page 13).** * Facilitators will need to modify the form if they make changes to the rubric elements for which participants have collected evidence. * Simulating the calibration that should occur between multiple observers, participants should pair-up and complete the post-conference planning form. Again, cap the activity at 10 minutes. * *The guiding questions from the model protocol on pages 7-8 of the handouts packet may be helpful in indentifying reinforcement and refinement areas*. | Simulated Unannounced Observation  Prepare for Post-Conference Turn to a partner and calibrate judgments based on evidence.   Work together to complete the Post-Conference Planning Form. Use the guiding questions in the Model CAP Observation Protocol to identify: 1-2 areas of reinforcement (“keep doing what you’re doing”); and   1-2 areas of refinement (“instead, try this…”).  Slide 18  12 minutes |
| Practicing:   * Provide each pair an opportunity to share their 1-2 reinforcement and 1-2 refinement areas. * Conduct a whole group discussion to uncover whether the judgments made based on the evidence collected and the feedback provided to the teacher (i.e., the reinforcement and refinement areas) were consistent within each pair and across the full group. If not, ask participants to reflect on why there were differences. | Simulated Unannounced Observation  Whole Group Discussion  Round robin sharing of 1-2 reinforcement and refinement areas.   Discuss: Were the indentified reinforcement/refinement areas consistent across all pairs? Are the identified resources and supports likely to help the educator improve practice in the refinement areas? What concrete feedback would you provide the educator during a post-conference? Slide 19  10 minutes |

## IV. Calibrating (45 minutes)

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| Calibrating:   * In this section, participants will watch a second video of instructional practice and engage in a calibration activity to promote a common, shared understanding of practice. * Districts are encouraged to provide opportunities for evaluators to calibrate often. ESE’s [Calibration Video Library](http://www.doe.mass.edu/edeval/resources/calibration/) includes over 40 videos of classroom instruction, as well as other calibration protocols and activities that can be used with the videos to develop a shared understanding of quality practice. | calibratingSlide 20  Quick Transition |
| Calibrating:   * *This definition of calibration is used by ESE’s educator evaluation team and reflects the importance of consistency in any evaluation process.* | Evaluator Calibration  Calibration is the result of ongoing, frequent collaboration of groups of educators to: 1. Come to a common, shared understanding of what practice looks like at different performance levels and  2. Establish and maintain consistency in aspects of the evaluation process including analyzing evidence, providing feedback, and using professional judgment to determine ratings Slide 21  1 minute |
| Calibrating:   * Prepare participants to conduct a second simulated unannounced observation. Participants should again use a strategy such as scripting on notepaper to thoroughly capture teacher and student actions and behaviors without judgment. * Again, facilitators may choose to change the focus element for this observation. * *Note the focus element for this lesson is adjustments to practice.* | Evaluator Calibration Simulation In a moment we will watch a second video of classroom instruction. This one features a 3rd grade classroom. Again, “observe” the lesson using ESE’s Model CAP Observation Protocol. Remember, engage in active evidence collection by recording educator and student actions and behaviors without judgment.  The focus element for this lesson is: adjustments to practice. After the video we will simulate a calibration activity. Slide 22  1 minute |
| Calibrating:   * The video clip featured on this slide is from the ESE’s [Calibration Video Library](http://www.doe.mass.edu/edeval/resources/calibration/). The videos in this series are not exemplars. The teacher practice depicted in the series is intentionally variable in quality to promote robust conversations. * Click on the screenshot in presentation mode to launch the video clip. * Stop the video at the 10:04 mark. | video for assessor calibration simulationSlide 23  10 minutes |
| Calibrating:   * Refer participants to the **CAP Observation Form for Unannounced Observation #2 (page 15), the rubric (not included), and the second Post-Conference Planning Form (page 16) included in the handouts packet.** * As before, each participant should work independently for 10 minutes using the observation form and rubric to sort the evidence collected by the rubric elements and identify 1-2 reinforcement and 1-2 refinement areas. Cap the activity at 10 minutes and inform participants that it’s ok if they do not complete the process in the time allotted. | Assessor Calibration Simulation  On your own: Using the observation form and the CAP Rubric, sort evidence into the evidence chart.  Complete the Post-Conference Planning Form. Use the guiding questions in the Model Observation Protocol to identify: 1-2 areas of reinforcement (“keep doing what you’re doing”); and   1-2 areas of refinement (“instead, try this…”).  Slide 24  12 minutes |
| Calibrating:   * Participants should break into teams of 3-4 and conduct a peer review of a group member’s feedback to the teacher. This process is based on a [model](http://www.doe.mass.edu/edeval/resources/calibration/SubjectAdmin.html) developed and used by the administrative team of the Revere Public Schools. * Each team identifies a subject who is willing to read aloud his/her feedback (i.e., the areas of reinforcement and refinement and) to the group. (2 minutes) * Next, the remaining group members critique the subject’s feedback and make suggestions for improvement while the subject listens quietly. (4 minutes) * Then the subject has a chance to respond to the team. (1 minute) * Finally, the team works together to brainstorm ways to make the subject’s feedback stronger. (3 minutes) * Depending on the time allotted for the workshop, facilitators may wish to let teams choose a second subject and repeat the process. | Evaluator Calibration Simulation In teams of 3-4, conduct a peer review of a group member’s feedback to the educator: Choose 1 person to be the “subject.” The subject will read aloud his/her feedback to the educator from the Post-Conference Planning Form. The remaining team members discuss their assessments of the feedback and make suggestions to improve the feedback.  The subject listens silently. The subject then responds to the team members’ assessment. The group listens silently. Together the team brainstorms specific ways to make the subject’s feedback stronger. Slide 25  12 minutes |
| Calibrating:   * Provide each team an opportunity to share 1-2 exemplars of feedback and a common understanding of practice that emerged in their discussion. | Evaluator Calibration Simulation  As a whole group: Each team shares the following with the full group: Exemplars of feedback to the educator and why they felt they were exemplars. One new common understanding or practice the team will adopt. Slide 26  10 minutes |

## V. Recapping (5 minutes)

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| Recapping   * In this final section, the facilitator will recap key takeaways and take questions. | RecappingSlide 32  Quick Transition |
| Recapping   * Provide participants an opportunity to chart key takeaways and ask questions. | Key Takeaways and Questions?Slide 33  5 minutes |