# Program Overview Worksheet

The Formal Review process is designed to recognize sponsoring organizations’ unique contexts and structures to gather a comprehensive evidence base for decision-making. The Program Overview Worksheet is the initial opportunity to orient DESE and the Review Team to the SO’s structure and approach to educator preparation. The information collected below will also support DESE’s preparation for focus groups and interviews.

The Required Documents and Candidate Artifacts listed in the tables below must also be submitted electronically along with the SO’s completed Program Overview Worksheet. While not required, the SO may also decide to reference these documents within relevant prompt responses.

Additional documents may be requested as part of the Follow-Up Inquiry based on evidence gathered during the Launch and Initial Inquiry stages of the review.

### Required Documents

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| **Criterion** | **Document Type** | **Description** |
| ORG 1 | Organizational Chart(s) | Organizational chart(s) for the SO at large and the educator preparation unit, including education personnel names. |
| CAN 1 | Admissions Policy | Admissions policy explaining the SO’s admission requirements for approved educator preparation programs.  If individual program(s) or groups of programs have distinct admissions policies, each policy should be submitted with the included program(s) clearly identified. |
| CAN 2 | Advising Policy | Advising policy describing how the SO positions candidates to be successful in their program, licensure, and career through guidance and comprehensive support systems.  This policy should cover both individual and group advising and resources to navigate higher education and PK-12 systems.  If individual program(s) or groups of programs have distinct advising policies, each policy should be submitted with the included program(s) clearly identified. |
| CAN 4 | Waiver Policy | Waiver policy outlining which, if any, of the following program requirements may be waived based on individual candidate experience and circumstances:   * Individual courses * Pre-practicum * Up to half of practicum/practicum equivalent * Practicum setting requirements (except for the use of the MA Curriculum Frameworks) * Supervising Practitioner requirements (license, experience, and/or educator evaluation rating)   Additional details can be found in Implementation of Waivers in Approved Programs section of the [*Guidelines for Educator Preparation Program Approval*.](https://www.doe.mass.edu/edprep/resources/guidelines-advisories/program-approval/)  If no waivers are permitted, the SO must submit a written policy documenting that decision.  If individual program(s) or groups of programs have distinct waiver policies, each policy should be submitted with the included program(s) clearly identified. |
| PAR: Multiple Criteria | Partnership MOU(s) | Memorandums of Understanding (MOUs) for any formalized PK-12 school/district and non-PK-12 external partnerships. |
| FBE: Multiple Criteria | Practicum policies and procedures | Practicum policies and procedures, which may be in the form of a practicum handbook. |
| FBE 5 | Performance Assessment Guidance and Materials | **For each Administrator, School Support Personnel, and Specialist Teacher program,** the SO should submit the performance assessment guidance and materials provided to candidates, including any rubric(s) used for the performance assessment. |
| INS: Multiple Criteria | Program(s) of Study | **For each licensure program/grouping,** the SO should submit a program of study that outlines the course titles (required and elective), the intended course progression, and any additional program components (e.g., field-based experiences).    If a program has multiple pathways (e.g., a traditional practicum pathway and a residency pathway, or a licensure-only and a master's program, both leading to a post-baccalaureate Math 8-12 endorsement), a separate program of study should be submitted for each pathway with key differences highlighted or annotated.    SOs should not need to create this for the DESE Formal Review. SO may have a similar document with a different name already in existence (e.g., advising sheets, course checklists). |
| INS 2 | Crosscutting SMK Matrices | **For each licensure program/grouping**, the SO should submit a crosscutting SMK Matrix listing the course(s) where each indicator is explicitly targeted and coherently addressed.  If indicators are covered differently across licenses within the same program grouping, separate matrices should be submitted. |

### Candidate Artifacts

For artifact categories that are relevant to all candidates, files must be shared for the candidates identified in DESE’s random sample. For categories that do not apply to all candidates, the SO will identify relevant files.

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| **Criterion** | **Artifact Type** | **Description** | **Sample** |
| CAN 3 | Cover Sheet for Differentiated Supports and Relevant Documentation | Evidence of how the SO identifies, provides differentiated interventions (also known as Tier II and III supports), and counsels candidates who need additional support beyond what is offered to the general student body in order to be successful.    As available, sample records should be provided for candidates identified in coursework, candidates identified in fieldwork (pre-practicum and practicum), candidates who ultimately successfully completed the licensure program, and candidates who chose to or were counseled to select a different path. | Sample size determined based on number of completers over the last 3 years, **candidates and completers selected by the SO as relevant**  For SOs with Elementary, Early Childhood, Moderate Disabilities PK-2, and Moderate Disabilities PK-8 programs, SOs will be provided a specific number of examples that should be provided based on their number of completers over the last three years. |
| CAN 4 | Cover Sheet for Waivers and Relevant Documentation | Evidence of how the SO applies its waiver policy equitably across programs and candidates and ensures that academic and professional standards of the licensure role are met.  Records should be provided for any requirements that have been waived by the SO. Each file should include a clear rationale for why the waiver was or was not granted. This may include waivers for:   * Individual courses * Pre-practicum * Practicum/practicum equivalent * Practicum setting requirements * Supervising practitioner requirements | Sample size determined based on number of completers over the last 3 years, **candidates and completers selected by the SO as relevant** |
| FBE 5 | Performance Assessments - Taken from Random Sample | Evidence of how the SO implements performance assessments consistently within and across programs to improve practice and ensure only candidates who are ready for full responsibility in the licensure role complete the program.  The random sample will include candidates from all licensure areas offered by the SO for which performance assessments are required.  The Performance Assessments during Practicum/Practicum Equivalent Experiences section of the [*Guidelines for Educator Preparation Program Approval*](https://www.doe.mass.edu/edprep/resources/guidelines-advisories/program-approval/) detail performance assessment expectations for each relevant licensure area:   * Initial Teacher licenses * Specialist Teacher licenses * School Support Personnel licenses * Administrator licenses   For Initial Teacher programs that use the CAP Online Platform, there is no need to add anything to SharePoint. For those using paper files, the following should be uploaded to SharePoint for each candidate:   * CAP Form * CAP Observation Forms * Student feedback instruments * Formative Assessment Form * Summative Assessment Form   Both CAP Online Platform and paper files should document the types of feedback provided to candidates after observations conducted by the program supervisor and/or supervising practitioner.  For all Administrator, School Support Personnel, and Specialist Teacher candidate files, the SO should upload similar performance assessment forms to SharePoint. | Sample size determined based on number of completers over the last 3 years, **random sample of candidates and completers selected by DESE**  For SOs with Elementary, Early Childhood, Moderate Disabilities PK-2, and Moderate Disabilities PK-8 programs, DESE will ensure that the sample includes completers from each of these programs. |
| FBE 6 | Field-Based Experiences Hours, Placement, and SP (Included in Performance Assessments – Taken from Random Sample) | Evidence that the SO’s field-based experiences meet [regulatory requirements:](https://www.doe.mass.edu/lawsregs/603cmr7.html?section=04)   * Practicum hours, including hours of full responsibility in the licensure role, as per 603 CMR 7.04 (4) * Placement(s) as per 603 CMR 7.04 (4) * Supervising practitioner qualifications as per 603 CMR 7.02.   This information should be captured in all performance assessment cover sheets. | Sample size determined based on number of completers over the last 3 years, **random sample of candidates and completers selected by DESE**  Note: For SOs with Elementary, Early Childhood, Moderate Disabilities PK-2, and Moderate Disabilities PK-8 programs, DESE will ensure that the sample includes completers from each of these programs. |

## Organization-Level Domains

For each prompt below, provide a brief response to orient the review team to high-level systems and structures at the SO. Each response should be no more than one to two brief paragraphs or a bulleted list. Other than those requested as a required document or candidate artifact, no supplemental or linked materials will be accepted at this time.

**Prompt A:   
The Organization Domain:** *The sponsoring organization is committed to achieving, and has systems, structures, and personnel in place to enable, equitable and effective program experiences and outcomes for all candidates.*

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| Briefly explain how budgetary decisions are made for the educator preparation unit, including personnel responsible, key milestones in the annual budget process, and recent priorities reflected in allocations. |
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**Prompt B:  
The Continuous Improvement Domain:** *The sponsoring organization engages in continuous improvement efforts that drive toward improved experiences and equitable outcomes for all candidates and the PK-12 students, schools, and districts they serve.*

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| Briefly describe any formal advisory groups that participate in the SO’s annual continuous improvement process, including participating stakeholders and the purpose of their involvement. |
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| Briefly describe any formal partnership structures that may help the review team understand the design of the SO’s PK-12 partnerships (e.g., an overview of MOUs with a district or districts, partnership tiers, cohort-based placements). |
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**Prompt D:  
The Field-Based Experiences Domain:** *All candidates engage in high-quality school-based experiences that prepare them to be effective educators for all students.*

Please fill out the table below for each licensure program offered by the SO. Regulatory requirements for field-based experience hours can be found in the Practicum/Practicum Equivalent Experiences section of the [Guidelines for Educator Preparation Program Approval.](https://www.doe.mass.edu/edprep/resources/guidelines-advisories/program-approval/)

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| --- | --- | --- | --- | --- |
| **Program**  (Field, Grade Plan, and Level) | **Course(s) Associated with Pre-Practicum Experiences** | **Total Practicum Hours** | **Minimum Hours in Full Responsibility** | **Course(s) Associated with Practicum Experiences** |
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| Describe how field-based experiences are structured within your sponsoring organization’s programs. For example, if you use a residency model, full-year placements, or have a high number of teachers of record, it is helpful to share that context.  If field-based experiences vary significantly by program, this should be noted and explained. |
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## The Instruction Domain

DESE groups similar licensure programs together for the Formal Review process. Evidence collected and evaluated during the Initial Inquiry and Follow-Up Inquiry will align with these groupings.

Program groupings are created with the following parameters as a guide:

* All Professional programs may be grouped together
* All School Support Personnel programs may be grouped together
* All Administrator programs may be grouped together
* All Endorsement programs may be grouped together
* Specialist Teacher programs may not be grouped together
* Initial Teacher licensure programs may only be grouped together if they meet all of the following criteria:
  + They are at the same level (i.e., baccalaureate programs cannot be grouped with post-baccalaureate programs)
  + The SMK Guidelines for the programs reference the same MA Curriculum Framework(s)
  + They have very similar programs of study (e.g., Biology 8-12 and Chemistry 8-12 post-baccalaureate programs might be grouped, if the primary difference in the programs of study are the content-specific courses covering the SMKs)
* Early Literacy Programs: Early Childhood and Elementary programs must be submitted individually, Moderate Disabilities PK-2/PK-8 may be grouped if they are at the same level (e.g., both are baccalaureate programs)

Your DESE Specialist has used these parameters to create program groupings on the pages that follow. **Please review the groupings carefully and contact your DESE specialist within one week of TA call 2 if 1) Any programs that are grouped together do not have similar programs of study or 2) You would like to propose adjustments in alignment with the parameters.**

Once confirmed, complete Prompts 1, 2, and 3 below for each program grouping.

**Instruction Domain: Program Grouping 1**

**Instruction Domain: [Specialist will duplicate as necessary and add grouping titles]**

**Prompt 1:**  
DESE has listed the license(s) that will be included in this program grouping in the table below. Complete the rest of the information for each relevant program.

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| **License Field and Grade Span** | **Level** (Bacc or Post-Bacc) | **List all variations or pathways for this program** | **Program Delivery Model**  (On-campus, Hybrid,  Online) | **Are any aspects of the program requirements asynchronous?**  (If yes, describe) | **Offered at a Satellite Campus?** (If yes, identify location and included pathway(s)) |
| [Added by specialist] |  |  |  |  |  |
| [Added by specialist] |  |  |  |  |  |
| [Added by specialist] |  |  |  |  |  |

**Prompt 2:**  
In the table below, identify the stakeholder group(s) responsible for delivering content for the program(s) within this grouping.

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| **Stakeholder Group** | **Delivers Any Program Content?** | **If yes, which components of the program of study are delivered by this group?** |
| Full-Time Education Faculty |  |  |
| Part-Time Education Faculty |  |  |
| Arts & Sciences Faculty |  |  |
| Other: (Please describe) |  |  |