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Executive Summary

America is at a crossroads. After leading the way in universal primary and secondary education, the academic achievements of American students have fallen behind those in many other countries. Over half of these deficiencies are a result of wide achievement gaps among low-income and minority (LIM) students. The Tulsa Independent School District Number One (TPS) represents one of many American school districts combating the challenges of deficient academic performance. Today, only a small fraction of its graduates (7%) leaves TPS ready for success in college and life.

Tulsa Public Schools (TPS) has set the ambitious goal of graduating 32% of its students college-ready in five years. Over the last year, TPS has taken major steps in improving its schools, such as reducing the number of School Improvement sites from 32 to 11 and partnering with ACT Rigor and Readiness. TPS believes the best weapon in the battle to bring about greater academic success and college-readiness is an effective teacher. It is eager and prepared to seize this unique opportunity to transform its teacher policies and practices and to become a model and catalyst for change for the rest of the nation.

In the pages that follow, TPS has outlined a comprehensive plan to improve the effectiveness of its teachers that will result in an eight-fold increase in college-readiness and eliminate the achievement gaps. TPS will establish a thorough and reliable teacher evaluation process to measure the effectiveness of all teachers, leveraging value-added scores for 53% of teachers as a key input into that process. Student performance data will inform development strategies that include cognitive coaching and site-based collaborative learning. TPS will revolutionize the compensation system by instituting performance incentives of up to 60% of base pay for highly effective teachers while teachers who do not reach minimum standards and fail to improve will be exited. Finally, TPS will revise district policies and practices that hinder the placement of effective teachers in front of students. All of these initiatives will build upon recent successes and momentum to form the centerpiece of a complete transformation of TPS that includes improved financial sustainability, the renewal of instructional-focused site leadership, and the deliberate cultivation of a high performance ethic in every part of the district.

With the support of a Gates partnership, TPS can move rapidly to implement its Teacher Effectiveness initiatives. TPS views Gates' support as essential to realizing its student achievement aspirations at a pace the students deserve. TPS is determined to execute these initiatives in the absence of a Gates' partnership, however, and has laid the groundwork to do so if necessary. The plan outlined below was developed with the extensive involvement and commitment of dozens of teachers, principals, central office staff, and community members. All three Tulsa Classroom Teachers Association (TCTA) officers were intimately involved in shaping the details of this work. The TPS Board of Education is enthusiastically supportive and will make all necessary changes to local regulations to enable the full implementation. Likewise, Oklahoma legislative leadership and senior executives at the Oklahoma State Department of Education have committed to promoting changes in state law and practice necessary to enable these strategies. Moreover, local business leaders and philanthropists, such as the George Kaiser Family Foundation and the Charles and Lynn Schusterman Family Foundation, have pledged to generate local funding support. The combined commitment of this community of leaders means that TPS will not be turning back.

Once implemented, TPS will be an ideal model for other districts. TPS has a population of over 42,000 students and 3,200 teachers at 89 school sites, making it the largest school district in the state of Oklahoma, but similar in size to many other districts in the nation. While located in the northeast corner of a state widely known for its rural and American Indian culture, TPS is an urban school district that faces all the challenges of much larger urban districts such as New York City, Chicago, and Los Angeles. At the same time, it has both suburban and rural populations, allowing for even broader transferability of learning. With large minority populations (34.9% identify as African-American, 34.4% as Caucasian, 19.2% as Hispanic, 9.9% as American Indian, and 1.4% as Asian) and 85% of all students qualifying for free or reduced lunch, the demographics at TPS mirror those of other challenged districts across the country.

TPS is representative of many U.S. school districts in two additional ways: challenged finances, with a budget per student well below the national average for urban districts, and governance.

Vision of Success

> ***Overall Vision: To recognize the absolute value of the classroom teacher and by any accountability measure, have the most effective teachers in the nation.***
>
> ***District Mission: To provide quality learning experiences for every student, every day, without exception.***

Currently, only 7% of TPS students graduate college-ready vs. 9% for the state of Oklahoma and 13% nationally. Furthermore, the gap in college-readiness along racial/ethnic lines is 13 percentage points while the gap along socio-economic lines is 12 percentage points. According to this same calculation, **only 1-2% of African-American and Hispanic students in TPS graduate college-ready**. TPS aspires to see 32% of students graduate college-ready in 5 years and 54% in 10 years through this teacher effectiveness project and it will achieve these goals by adhering to the exacting standards laid out by ACT. The college-readiness and academic achievement gaps along racial/ethnic and socio-economic lines will be eliminated.

College-readiness rates were calculated by multiplying the 4-year graduation rate by the percentage of graduates taking the ACT test that was again multiplied by the percentage of students who passed all four ACT subtest benchmarks.

Currently, the 4-year graduation rate at TPS is 70%, but it aspires to see 85% of its students graduating in four years by 2014.

The TPS plan for Teacher Effectiveness centers around four interrelated initiatives:

Initiative 1: Assess and Set Standards - evidence-based, objective, reliable teacher/leader effectiveness assessments
- Element 1.1: Value-added Assessments
- Element 1.2: Performance Rubrics
- Element 1.3: Training and Calibration
- Element 1.4: Continuous Improvement
- Element 1.5: Assess Leader Effectiveness

- Element 1.6: Exit Ineffective Teachers and Leaders

Initiative 2: Deploy and Motivate - strategic deployment and compensation of effective teachers/leaders
- Element 2.1: Revamp Teacher Compensation Structure
- Element 2.2: Revamp Leader Compensation Structure
- Element 2.3: Deploy Effective Teachers and Leaders to LIM Students

Initiative 3: Develop - data-driven, collegially-interactive professional development
- Element 3.1: Professional Learning Teams
- Element 3.2: Knowledge Management Systems
- Element 3.3: Data-driven Development Courses
- Element 3.4: Transition Principals to Instructional Leaders

Initiative 4: Attract – recruitment of high potential teacher/leader candidates
- Element 4.1: Align Administrative Processes
- Element 4.2: Improve Screening and Hiring Processes
- Element 4.3: Increase Traditional Applicant Pool
- Element 4.4: Expand Sources of New Teachers
- Element 4.5: Identify and Recruit Effective Leadership

Milestones, Outcomes and Results

Year One: 2009-2010	
• Pilot assessment process for all teachers and leaders • Implement four days of training for performance rubric reviewers prior to July 31, 2010 • Establish performance rubric and value-added calibrations • Implement additional tests to increase courses and subjects with value-added data • Exit ineffective teachers based on a combination of principal observations and current appraisal system	• Reschedule 86% of middle/high school teachers in advanced courses to also teach core content courses • Implement Gallup Teacher and Principal Insight tool to predict success • Stage first *Teach for Tulsa Day* for applicants • Deploy 75 *Teach for America* Teachers • Revise district policies to provide all schools with access to new/transfer applicants in January • Build team of 30 full-time teachers/part-time relational recruiters
Impact: Increase 4-year graduates passing all 4 ACT benchmarks to 8%.	

Year Two: 2010-2011	
• Calculate three years of value-added data available for Math and English Language Arts teachers • Roll-out new compensation system, all teachers eligible to opt in • Exit ineffective teachers based on combination of performance rubric and value-added scores in accordance with due process	• Deploy three leadership teams to the most challenged schools • Pilot Professional Learning Teams in nine schools to focus on data-driven instruction • Pilot School Administrative Managers in 15 schools to enable principals to be instructional leaders • Enroll 60 college sophomores in Urban Institutes at partner universities
Impact: Increase 4-year graduates passing all 4 ACT benchmarks to 9.4%.	

Years Three, Four and Five: 2011-2014	
• Calculate two and three years of value-added data available for all core subject teachers in grades 3-11	• Roll-out School Administrative Managers • Compile research to determine how teaching

• Deploy three leadership teams to the most challenged schools • Roll-out Professional Learning Teams to all schools	practices and evaluation instruments correspond to student learning

2011-2012 Impact: Increase 4-year graduates passing all 4 ACT benchmarks to 14.1%.

2012-2013 Impact: Increase 4-year graduates passing all 4 ACT benchmarks to 19.8%.

2013-2014 Impact: Increase 4-year graduates passing all 4 ACT benchmarks to 27.2%.
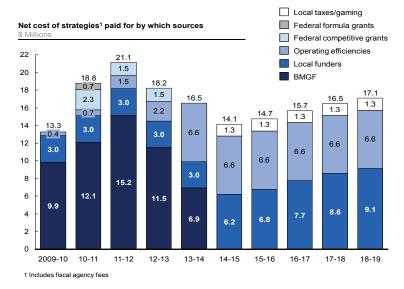
Organizational Capacity

TPS' plan for dramatically improving teacher and school leader effectiveness represents two of the six pillars necessary to shore up the overall transformation of TPS, speared by the vision and commitment of the Board of Education. The other pillars include Classroom Management, Secondary School Reform, Parent/Community Involvement, and Financial Sustainability. Multiple initiatives are already underway in the areas of Classroom Management, Secondary School Reform and Parent/Community Involvement. Initial steps have also been taken to drive financial sustainability including staggered school start times to reduce transportation costs, reorganized central office to reduce personnel costs, and pledged support of local philanthropists. Other cost saving measures are currently being investigates as well.

While this broader transformation is critical to the overall performance of students, the challenge to the TPS organization's capacity for change is recognized. Many of the initiatives require both stamina and a new way of working. Thus, the transformation plan also includes multiple cross-cutting enablers such as the deliberate creation of a high-accountability, student oriented performance culture in every part of the district; data-driven decision making; a service-oriented central office with a stronger Human Capital function; and an ongoing investment in building and maintaining a spirit of "one team." Regular informal meetings have been established with both the TPS Board of Education and TCTA to build a one-team mentality. Teachers and principals have been substantively and constructively engaged with central office staff to drive the development of this plan and will continue to be thus engaged district-wide going forward. The change management plan will continue to "hold up the mirror" to the limiting mindsets many hold and provide new tools to change those mindsets. Finally, the new Program Management Office (PMO) will integrate all of the change initiatives to ensure that every initiative is resourced properly and on target; that activities affecting classrooms are appropriately sequenced and coordinated to minimize disruption; and, most importantly, that stakeholders understand how these initiatives collectively work toward a common goal – a transformative level of student success

Budget

TPS' Teacher Effectiveness initiatives will cost $166 million over the next ten years. TPS anticipates that $56 million will be provided through the Gates partnership, $44 million will be derived from repurposing existing TPS revenues, $53 million from local philanthropic commitments, and $13 million from other sources such as federal and state grants. This budget will be fully sustainable without support from the Bill and Melinda Gates Foundation after 2013-2014.

Figure 1: Projected Budget

Net cost of strategies[1] paid for by which sources
$ Millions

Legend:
- ☐ Local taxes/gaming
- ▨ Federal formula grants
- ▨ Federal competitive grants
- ▨ Operating efficiencies
- ▨ Local funders
- ▨ BMGF

Year	BMGF	Local funders	Operating efficiencies	Federal competitive grants	Federal formula grants	Local taxes/gaming	Total
2009-10	9.9			3.0		0.4	13.3
10-11	12.1		3.0	0.7	2.3	0.7	18.8
11-12	15.2		3.0		1.5	1.5	21.1
12-13	11.5		3.0	2.2	1.5		18.2
13-14	6.9	3.0	6.6				16.5
14-15		6.2	6.6			1.3	14.1
15-16		6.8	6.6			1.3	14.7
16-17		7.7	6.6			1.3	15.7
17-18		8.6	6.6			1.3	16.5
18-19		9.1	6.6			1.3	17.1

1 Includes fiscal agency fees

Research and Evaluation

Finally, TPS will ensure that every aspect of the Teacher Effectiveness initiatives positively impact student achievement and will identify the combination of strategies that bring about the most significant growth through the implementation of a robust plan of evaluation. In addition to cooperating with the Gates' research teams, TPS will work both internally and externally to collect and analyze all data as well as developing research-based iterations of initiatives and expansion of strategies as applicable.

Project Description

Vision of Success: Baseline and Gap Identification

TPS is committed to attaining dramatic improvements in student achievement. While all TPS activities exist to support this, the Teacher Effectiveness initiatives will be the primary catalyst to drive both college-readiness and academic achievement rates to heights heretofore unseen in the district. TPS believes that increasing the effectiveness of its cadre of teachers will act as the engine to push forward its intermediate goal of raising the overall academic achievement rates and its ultimate goal of graduating students college-ready in four years.

College-Readiness Baseline

TPS will use two measures to evaluate the college-readiness of its students: 1) the percent of high school freshmen who graduate in four years and have met the ACT's benchmark scores on all four sub-tests; and 2) the percent of high school freshmen who graduate in four years and matriculate to college.

To calculate the percentage of students graduating college-ready, the 4-year graduation rate (70%) was multiplied by the percentage of graduates taking the ACT test (68%). That total (47%) was then multiplied by the percentage of students who passed all four ACT subtest benchmarks (15%). According to ACT research, students who pass these benchmarks have a

75% chance of earning a C or higher in their college courses. The resulting college-ready rate for all students entering high school in the 2004-2005 school year was 7%. This overwhelmingly low statistic falls below the state average of 9% (Oklahoma State Department of Education statistics) and nationwide average of 13% (ACT statistics).

To calculate the total percentage of students going to college immediately after high school graduation (whether in or out of state), the 4-year graduation rate (70%) was multiplied by the percentage of graduating students who went straight to college (60%). The resulting college-going rate for all students entering high school in the 2004-2005 school year was 42%.

TPS has set aggressive five and ten year goals to raise college-readiness rates for all students as well as close the achievement gaps that exist along racial/ethnic and socio-economic lines. See Figures 2 and 3 below for goal details.
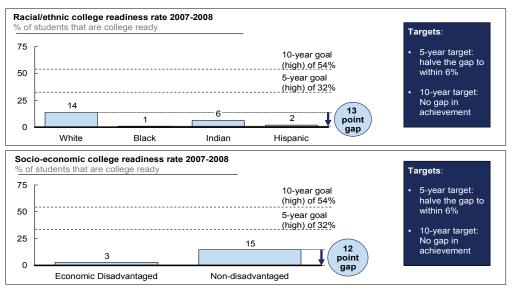
Figure 2: College-Readiness Goals

1st Measure: ACT benchmark

	2007-2008 benchmark Percent	5-year Percent L	H	10-year Percent L	H
4-year graduation rate	70[1]	85	85	95	95
% of graduates taking the ACT	68	90	90	95	95
% passing all 4 subtests	15	30	45	50	60
% graduating college-ready	**7**	**23**	**32**	**45**	**54**

2nd Measure: College-going

	2007-2008 benchmark Percent	5-year Percent	10-year Percent
4-year graduation rate	70[1]	85	95
Linear college-going rate	60	75	85
% college-going	**42**	**64**	**81**

- TPS chose the percent of graduates taking the ACT to be slightly higher than the percent matriculating to college
- TPS benchmarked the percent of students passing all 4 subtests against the best district in the nation with over 60% participation rate

Figure 3: College-Readiness Gaps along Racial/Ethnic and Socio-Economic Lines

Racial/ethnic college readiness rate 2007-2008
% of students that are college ready

10-year goal (high) of 54%
5-year goal (high) of 32%

White 14, Black 1, Indian 6, Hispanic 2 — **13 point gap**

Targets:
- 5-year target: halve the gap to within 6%
- 10-year target: No gap in achievement

Socio-economic college readiness rate 2007-2008
% of students that are college ready

10-year goal (high) of 54%
5-year goal (high) of 32%

Economic Disadvantaged 3, Non-disadvantaged 15 — **12 point gap**

Targets:
- 5-year target: halve the gap to within 6%
- 10-year target: No gap in achievement

Academic Baseline

Since student achievement data is a critical indicator of a student being on pace to graduate college-ready, performance will be tracked according to state tests. The *Oklahoma Student Testing Program Results* 2007-2008 demonstrates that as TPS students advance in grade levels, their academic achievements trend downward as compared to the state average. See Figure 4.
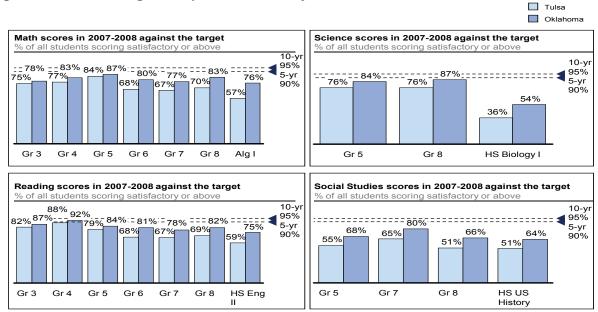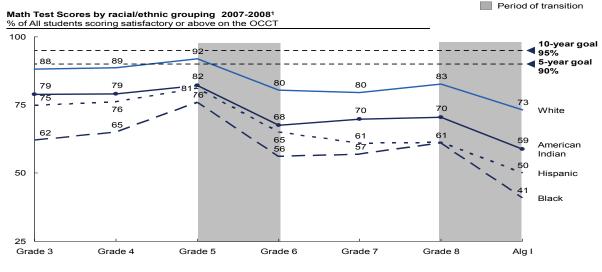
Figure 4: State Testing Data by Grade and Subject

SOURCE: Oklahoma State Accountability Office, team analysis

Deeper analysis reveals that TPS students experience a significant drop in achievement during the transition years of sixth and ninth grade as well as significant achievement gaps along racial/ethnic and socio-economic lines. See Figure 5 below.

Figure 5: Math Scores by Racial/Ethnic Groupings
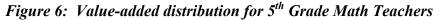
1 Asian students not shown due to small sample size
SOURCE: Oklahoma State Accountability Office, team analysis

The Oklahoma State Department of Education has acknowledged that the standard for satisfactory scores on the state tests has been set too low and has raised the standards in 2009. Therefore, the academic achievement data above overstates the performance of TPS students. Further, based on these elevated standards, in July 2009, the State Department of Education placed TPS on a probationary accreditation status. It is clear that TPS has a long way to go, but it is committed to making significant and lasting improvements in student achievement.
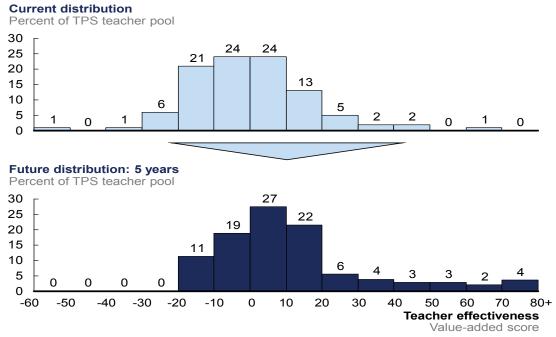
Teacher Effectiveness

5-Year Goal
95% of TPS teachers will achieve an effectiveness score on the performance rubric and value-added (as applicable) assessments that are at or above the district standard each year.

Though multiple initiatives will support improvements in student achievement, the primary driver will be dramatic increases in teacher effectiveness. TPS currently lacks quantifiable and objective assessments for identifying teacher effectiveness. A sampling of data, however, was submitted to Mathematica, Inc. in July 2009 for a norm-referenced value-added analysis of fifth grade math teachers from which a teacher effectiveness baseline can be extrapolated. The distribution of said scores is shown in Figure 6 below along with the predicted 5-year impact of the initiatives on teacher effectiveness. This impact was calculated by adding estimated impacts from each of the initiatives to an estimated baseline of teacher effectiveness, accounting for expected turnover rates. Initiative impacts were applied to teachers differentially depending on their respective starting effectiveness (i.e., the least effective teachers were improved more by certain development initiatives than were more effective teachers).

Figure 6: Value-added distribution for 5th Grade Math Teachers

SOURCE: Mathematica analysis of TPS 5th grade math teachers; TPS teachers survey

Teacher Distribution

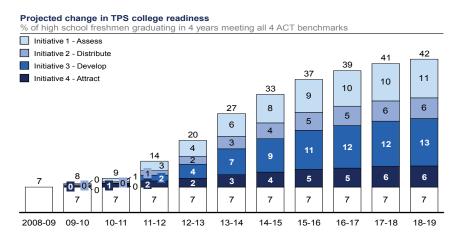| **5-Year Goals** |
| --- |
| 50% of teachers and leaders may receive annual performance incentives based on individual and school-based student growth measures and individual performance rubric ratings |
| All highly challenged schools within the district will be 100% staffed by effective teachers and leaders as measured by value-added and performance rubric measures |

Since TPS has no quantifiable and objective assessment of teacher effectiveness, as noted earlier, TPS cannot analyze the current distribution of effective teachers in the district and within the schools. Further, there are distressing indicators that distribution has not been optimized to meet student needs. According to the TPS Office of Accountability, 100% of non-highly qualified teachers (by NCLB standards) have been placed in the highest poverty schools.

Going forward, TPS will implement a strategy to utilize the outputs of the new assessment system to place highly effective teachers in front of low income and minority (LIM) students. By 2013-2014, all teachers instructing the district's LIM students (i.e., most challenged) will be highly effective so those students have the same chance for success.

Figure 7 illustrates the projected improvements in college-readiness rates attributed to increased teacher effectiveness in combination with other district efforts contributing to student achievement improvements. TPS will achieve its five year and ten year goals for college readiness which exceed the anticipated teacher effectiveness goals.

Figure 7: Projected Percent of Freshmen Graduating College-Ready in Four Years

This impact was calculated by adding estimated impacts from each of the initiatives to an estimated baseline of teacher effectiveness. Expected rates of turnover were taken into account and initiative impacts were applied to teachers selectively depending on their respective effectiveness (i.e., the least effective teachers were improved more by certain development initiatives than were more effective teachers). The impact on student achievement, based on each teacher's effectiveness, varied depending on that teacher's experience level, the student's prior achievement level (differential impact), and the mitigation of effects of good or bad teachers over time (fade-out).

Strategic Initiatives:

TPS is on a mission to be a pioneer in the world of education. In November of 2008, the Tulsa Board of Education took the first steps along the path to a district-wide transformation with the hiring of a new Superintendent. In March of 2009, TPS began in earnest to develop its Teacher Effectiveness initiatives as a part of that transformation.

In an effort to gain widespread support and buy-in from all stakeholders, TPS, with leadership and direction provided by the Board of Education, formed a multi-level team to analyze the successes and deficiencies of the district as well as design a strategic vision to achieve its focused goals.

By May of 2009, the team included the following:

- Steering Committee members (met bi-weekly for three months)
    - Superintendent
    - President of the Board of Education
    - President of the Tulsa Classroom Teachers Association
    - 2 Deputy Superintendents
    - Assistant to the Superintendent for District Accountability
    - President of The University of Oklahoma at Tulsa
    - Special Education Advisor at Langston University
    - Executive Directors of 2 Community Foundations
    - 3 Representatives from the Oklahoma State Department of Education
- Core Project Team members (met 2-3 times per week for three months)
    - Executive Director of Federal Programs and Special Projects
    - Deputy Superintendent
    - Assistant to the Superintendent for District Accountability
    - Systemic School Reform and Re-Design Specialist
    - District Grant Writer
    - Vice President of the Tulsa Classroom Teachers Association
- 8 Initiative Specific Working Teams (met 2-3 times per week for three months)
    - 8 teachers and 7 principals contributing at least 30% of their time
    - 80 teachers and 12 principals providing input through interviews and focus groups
    - 3 TCTA officers contributing at least 40% of their time
    - 44 TPS employees contributing at least 30% of their time

These stakeholders strongly support the initiatives they have developed together. This is a positive break from the past where major shifts in District policy were developed independently of teacher input, have taken years to implement, and have often proven completely ineffective at the classroom level – a result which is utterly unacceptable for the students in TPS. In his work entitled *How Teachers Taught: Constancy and Change in American Classrooms*, Larry Cuban discussed the effects of major policy shifts in saying that, "[t]he surface is agitated and turbulent, while the ocean floor is calm and serene (if a bit murky). Policy churns dramatically, creating the appearance of major changes…while deep below the surface, life goes on largely uninterrupted." TPS will proactively address every obstacle and challenge that would handicap this district-wide shift, and, in certain cases such as the deployment of effective teachers and the exiting of ineffective teachers, will begin immediate implementation. Students do not have the

time to wait for the political compromises that keep an ineffective teacher at the front of their classroom.

Research from Tennessee has shown that student performance can diverge by as much as 50 percentile points from the same starting point with just three years of a low performing teacher versus a high performing teacher (*How the Best-Performing School Systems Come Out on Top* by Sir Michael Barber and Mona Mourshed). TPS will no longer put its students at risk of such divergent achievement. The following initiatives, centered on teacher effectiveness, will ensure that all students, specifically the district's LIM students will have an effective teacher every year of their education, leading to improved achievement and life outcomes.

Initiative 1: Assess and Set Standards
Vision: To create and effectively implement a reliable assessment system based on mutually adopted standards for teacher and leader efficacy for all teachers and administrators, including outcomes and process measures, designed to ensure sustainable improvement in student achievement.

Current Practices

State law in Oklahoma requires that all career teachers be evaluated at least once each year and probationary teachers twice each year. In complying with this regulation, the TPS handbook has mandated that this evaluation should occur no later than May 1. For probationary teachers, the state requires that they be evaluated no later than November 15 and February 10 of each year. Additionally, before a teacher, probationary or career, can be evaluated, negotiated agreements direct that the principal conduct at least two informal observations.

While the timeline is firmly in place for when teachers in TPS are evaluated, there is no system of accountability to ensure that the principals have done the evaluation correctly or on time. Principals may perfunctorily complete an evaluation without regard for the importance of embedding practical development assistance for teachers. Further, there is not a clear set of expected effectiveness standards, nor is there a clear definition as to what the current ratings of effectiveness mean.

> *"Evaluations are inherently subjective and untrustworthy."* – TPS Teacher

Teachers regularly protest that the first time they see the components of the assessment tool is after they have been evaluated. They have, therefore, determined that these evaluations are highly subjective and meaningless to their performance. Any program or policy that relies on the outputs of the current assessment tool is immediately suspect in the mind of the teachers.

State law does not currently mandate principal or school leader evaluations, so while there is a performance rubric for principal assessments, there is no consistency as to whether or how well an evaluation is done.

As there is no reliable way of identifying ineffective teachers who should be exited, the current exiting processes are inconsistent and ineffective. The research of Tom Kane theorizes that 25% of probationary teachers should not be offered continuing contracts, but in 2007 TPS decided not

to offer continuing contracts to only 30 (7%) of 400 probationary teachers. In 2008, when a shortage of teachers developed, ten of those exited teachers were rehired to fill the spots.

Finally, less than 1% of teachers with more than two years of experience leave the system involuntarily despite the fact that survey results suggest that there are ineffective teachers currently teaching TPS students, but nothing has been done to remove them.

Initiative 1 Components:	*Gaps Addressed:*
- Use value-added assessments to measure teacher and leader effectiveness - Use a performance rubric to measure teacher and leader effectiveness - Ensure acceptance and reliability through training and assessment calibration - Ensure fairness and long-term viability of the assessments through continuous improvement - Exit teachers identified as ineffective through use of the assessment tools	- Current assessment system insufficient for identifying effective teachers, performance pay and deployment decisions, development efforts, and/or continuing contract decisions - No outcome measures - Expectations and standards not clearly defined - Evaluations not consistent, reliable, or transparent - Evaluation results not tied to data system - Over 93% of our teachers receive continuing contracts after 18 months 29% of teachers in initial sample of 5th grade mathematics teachers have a value-added of below -10 scale score points. This indicates that they could be exited within two years if their performance does not improve.

In their article entitled *The Widget Effect: Our National Failure to Acknowledge and Act on Differences in Teacher Effectiveness*, Daniel Weisberg and Susan Sexton, et al., from *The New Teacher Project* stated, "The core purpose of evaluation must be maximizing teacher growth and effectiveness, not just documenting poor performance as a prelude to dismissal." In consideration of this idea, TPS has designed the Teacher Effectiveness plan so that the assessment system is the driving engine. Without an objective and reliable method through which one may identify the effective teachers and isolate areas of improvement for all teachers, teacher effectiveness within TPS will have no impetus to improve.

Once implemented, the outputs of the assessment system will provide multiple "customers" with invaluable information around which they will shape their decision-making processes. Potential "customers" include professional development selection, professional development evaluation, performance-based rewards, inter-school deployment strategies, intra-school deployment strategies, continuing contract decisions, and teacher recruiting source evaluations.

TPS proposes two separate tools, used jointly, to measure teacher effectiveness: 1) value-added assessments and 2) rubric based performance assessments. TPS will implement performance management and survey systems to provide data systems support for this initiative.

Value-added assessments:

Value-added assessments were chosen to pinpoint the academic successes of the students of individual teachers as a valid measure of the effectiveness of said teacher. Teachers will be measured according to the average achievement of each student for whom they have been responsible for instruction for the full year and for whom they have accurate pre-test data.

TPS has determined that a nationally recognized vendor that specializes in value-added measures will best serve its purposes for the following reasons: the calculations and analyses necessary to produce reliable value-added scores are very complex and it needs to take a proactive approach to instilling teacher confidence in the objectivity of the assessment system. In order to vet potential vendors, a sample of test data for 5th grade math teachers will be submitted to multiple vendors. The vendor will be selected based upon the quality of the returned sample calculations and in compliance with all contract-bidding guidelines.

Only teachers in tested grades or subjects where a test was given in the previous year will be assessed with an individual value-added score. The first chart found in Figure 8 below identifies all tested grades or subjects while the second chart identifies the grades and subjects for which there will be value-added scores. As is evident, some teachers whose classes are given tests will still not be assessed with an individual value-added score (See 2nd grade in both charts). They will not receive a score because there is no pre-test given in the 1st grade against which to measure their growth. The 2nd grade test will serve as the pre-test for 3rd grade students.

According to both the Oklahoma State Department of Education as well as testing vendors, there are currently no reliable testing measures for grades Pre-K – 1st.
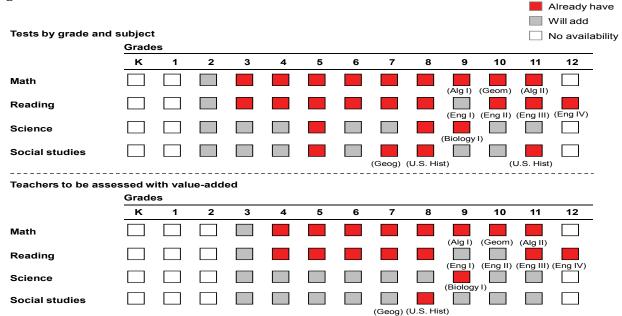
Figure 8: Value-Added Tests and Scored Teachers

After following state procurement policies, TPS will work with a testing vendor to fill in existing gaps in test grades and subjects to maximize the number of pre and post tests given, allowing more teachers to be assessed with individual value-added scores. Those grades and subjects for which there is not currently a reliable testing measure will remain untested until such time that test a can be created.

In the interest of equity and to insure that each teacher is ultimately measured, those teachers who are in non value-added grades and subjects will be assessed with emphasis placed on their observed performance evaluations (discussed in more depth below). The evaluation will include a component addressing student achievement as well as their contribution to the success of their school as measured by the school's value-added scores.

School value-added scores will be calculated based on all the same formulas as the individual teacher value-added scores, with the exception they will include the scores of all students who were enrolled in said school for the full academic year.

Element 1.1 Timeline	
Select Vendors	Fall 2009
Perform Value-Added Analysis with current tests (06-07 - 08-09)	Spring 2010
Develop Assessments	Fall 2009 – Spring 2010
Perform Value-Added Analysis with new tests (09-10)	Summer 2010
Roll-out	Summer 2010 – Spring 2011

Element 1.2: Performance Rubric

Performance rubric

While only a portion of TPS teachers will have individual value-added scores, all teachers will be assessed using the newly re-designed teacher performance rubric. The rubric has been carefully crafted to comply with all state regulations while being more effective in the process of identifying the effectiveness and developmental needs of teachers. The team assigned to this re-design examined the standard Oklahoma evaluation tool, evaluation tools from other states such as Tennessee, the research of Charlotte Danielson, as well as that of Thomas Toch and Robert Rothman.

Based on this research, the team created a framework for a performance rubric that will assist the teacher and reviewer in identifying behaviors proven to increase student academic achievement. The team determined that there should be five domains: organizational/classroom management, instructional effectiveness, professional growth and continuous improvement, interpersonal skills, and leadership skills. Under each domain, a manageable number of dimensions will be listed to assist the reviewer in precisely determining how the teacher performs within each domain. See Figure 9 for a sample domain and its dimensions.

Figure 9: Sample Domain and Dimensions of Teacher Effectiveness Process Measures

Domain	Dimension	
Organizational/Classroom Management	• Preparation • Routine • Discipline • Learning Environment	• Lesson plans • Student files • Grading patterns

The final rubric will include clear indicators of each domain and dimension that will be provided to each teacher and reviewer along with training to understand fully the measures. The rubric will be divided into five numerical performance levels explicitly defined for each dimension. Teachers who meet the lowest performance level (1) criteria will be equivalent to "unsatisfactory." Correlatively, teachers who meet the highest performance level (5) criteria will equate to the most effective teachers.

The performance level indicators developed for each dimension will align with the behaviors that would be demonstrated by a teacher who fit into each performance category. There will be clearly demonstrated distinctions in each category and each description will be crafted to be as objective as possible. Additionally, they will be carefully tailored to be appropriate for both elementary and secondary level teachers while weighting certain dimensions over others to ensure that a teacher receiving a high rubric score is an effective teacher and one receiving a low score is not.

Currently, performance indicators have been drafted for ten dimensions in order to provide guidance for the rubric development process. A team of teachers, TCTA representatives, principals, and administrators will develop the full list of performance indicators in the fall of 2009. See Figure 10 for an example of performance indicators for one dimension.

Figure 10: Example of Clear Descriptions of Performance Levels for Dimensions

Dimension	1	2	3	4	5
Lesson plans: The teacher develops a syllabus and associated lesson plans to guide student instruction according to identified standards and benchmarks	No syllabus, scope and sequence or lesson plans exist	Lesson plans are developed but, lack connection to syllabus or scope and sequence and pacing calendars, and include no details or descriptions of intended learning	Syllabus or scope and sequence is completed Pacing calendar is used to guide lesson plans for short term horizons Plans reflect collaboration with peers/mentors and include basic description for teaching and reteaching content Teacher describes assessment method	Includes Level 3 descriptors plus: Plans maintain direct alignment to syllabus or scope and sequence and pacing calendars and reflect long term planning Plans integrate identified standards, benchmarks, and pacing calendars Plans indicate some evidence of inclusion of Marzano's nine instructional	Includes Level 4 descriptors plus: Lesson plans are developed based on student performance data Plans reflect collaboration with grade-level or subject-area team members when possible to address gaps in student learning Plans demonstrate consistent use of Marzano's instructional strategies to maximize the

				strategies Teacher links assessment strategies to intended learning	possibility of enhancing student achievement

Review Process

The assessment rubric will be utilized for two different purposes: appraisal and evaluation. Appraisal reviews will be conducted for development and feedback purposes only. Results of the appraisal review will not be used as an indicator of job performance, but will rather be an opportunity for the teacher to communicate with her mentors and school leaders in order to become a more effective teacher. Evaluation reviews will act as the official job performance assessment and will be used to make decisions such as compensation, placement, and continuing contracts.

All reviewers (principals, assistant principals, teacher-leaders, peer coaches, and repurposed instructional specialists) will be eligible to complete an appraisal review. At a minimum, probationary teachers on a temporary contract will be appraised twice between August and September and twice between October and December of each year. These feedback appraisals, along with professional development components discussed under Initiative 3 and an induction program currently in development will act as the support system for probationary teachers during their crucial first year of teaching.

Career teachers will be appraised in November and once more prior to February. These appraisals will not be official performance evaluations, but rather will be used as a tool for the teacher as well as their building leadership to gauge the developmental progress of the teacher. Appraisal reports will be used to guide the teacher to the appropriate development courses, modeling and coaching that will improve their effectiveness in the classroom. In addition to these required appraisals, teachers and/or administrators may request additional appraisal reviews throughout the year for development and feedback purposes.

Formal evaluations will be performed by administrators only (principals and assistant principals). Probationary teachers will be evaluated in October and January. Career teachers will be evaluated between February and April of each year. Administrators will be required to complete no less than two observations of each teacher before completing a formal evaluation. These two observations could be satisfied with the informal appraisals completed prior to the formal evaluation so long as an administrator conducts them. The formal evaluations will be used in making distribution decisions such as school and classroom placement, compensation, exiting, and leadership roles.

Element 1.2 Timeline	
Develop full rubric	Fall 2009
Pilot	Spring 2010
Roll-out	Spring 2010 – Spring 2011

Assessment Rubric Training

All reviewers will be thoroughly trained in using the assessment rubric during multi-day sessions to ensure that each reviewer observes, reports, and differentiates the same behaviors in the same way. Required refresher courses will be given yearly and as necessary to ensure consistency.

Teachers will also undergo in-depth training on the rubric in order to engender confidence in its objectivity, teach them how to properly interpret their results, and to set expectations of performance. In the first year of implementation, all teachers will be required to attend a ½-day training session. Sessions will be conducted with groups of 50-100 teachers.   In subsequent years, all probationary teachers will be required to attend this initial training in the summer prior to their first year.

Once per year, a one-hour refresher course will be provided during required professional development days or faculty meetings. At any time, a teacher or principal may request additional training and/or discussion.

Calibration

In order to ensure inter-rater reliability, four calibration systems have been developed within the assessment initiative. The first calibration will occur during the initial implementation process. During the initial reviewer training, trainees will observe videos of lessons and classroom interactions of non-TPS teachers. Trainees will use the performance rubric to score the teachers on the video. Trainers will compare the scores by which video was reviewed, ensuring that the scores given by all reviewers for a particular teacher were satisfactorily similar.

The second calibration will occur during the pilot roll-out. Principals and central office administrators will assemble a group of 100 TPS teachers considered to be highly effective. After and during observations, trainees will use the performance rubric to score the teachers and compare reviewer scoring according to which teacher was reviewed. This same process will then be conducted with a random assembly of 100 TPS teacher volunteers.

The third calibration is planned to occur after the full-scale roll-out and will continue throughout the life of the assessment system. The formal evaluation review process will be calibrated by utilizing a dual-rater review system on a random sampling of evaluations, where two reviewers observe the teacher simultaneously and compare their evaluation results only after the completion of the review process. At the request of a teacher, his/her review may also be conducted using a dual-rater review process to account for potential discrepancies with the principal's results. Where there is a variance in the scores between the principal and the reviewer, discussion will occur as to which result to accept. All variances will be noted in the principal's evaluation. When a reviewer (including principals) exceeds a maximum number of variances, that reviewer must retrain.

The fourth calibration will be a data-driven comparison conducted after the district begins receiving complete value-added calculations. The distribution of the district-wide evaluation results will be compared with the district's value-added score distribution to ensure that the

observed behaviors of teachers as indicated on the rubric align with the distribution of the value-added scores based on actual student academic achievement data.

Should any of these calibration methods demonstrate a discrepancy, thorough research will be conducted in order to refine the performance rubric and/or reviewer training as necessary.

Element 1.3 Timeline	
Develop training	Fall 2009
Pilot	Fall 2009
Roll-out	Spring 2010 – Spring 2011

Element 1.4: Continuous Improvement

Teachers will be encouraged to provide feedback on their own formal evaluation as required by the Gates evaluation plan. Each year, upon the principal's submission of the formal evaluation report, a confidential feedback survey will automatically be provided to teachers on a secure website. One-day workshops will be held every summer for three years to suggest tangible changes to the assessment process, informed by the survey results. Attendees to the workshops will include 20-40 principals, assistant principals, teachers, administrators and TCTA representatives. After the assessment system has been in place for three years, summer workshops will be held as necessary to ensure the efficacy of the assessment tool in identifying and improving effective teachers.

Element 1.4 Timeline	
Develop feedback forms	Fall 2009
Pilot	Fall 2009 – Spring 2010
Roll-out	Spring 2010 – Spring 2011
Hold workshop to incorporate assessment process feedback	Summer 2010, 2011, 2012
Research correlation between rubric and student achievement	Summer 2010 – Spring 2011
Revise rubric based on research	Summer 2011 – Summer 2013
Roll-out new rubric and institute other evaluation tools (surveys, etc)	Fall 2013 – Fall 2014

Element 1.5: Assess Leader Effectiveness

Just as teachers will be assessed with more than one tool, the effectiveness of district and school leadership including principals and assistant principals will be measured according to multiple data points: student achievement data, school value-added scores, parent/student/teacher surveys, and the performance rubric.

Student Achievement Data

For developmental appraisal and evaluative purposes, the district accountability office will update a data dashboard for each principal and their administrative supervisor every nine weeks. The dashboard will assist the principal in taking targeted action by revealing relevant data such as student achievement benchmark data in the four core subjects (class grades, percent passing, percent satisfactory, year over year improvement, subgroup scores). The dashboard will also include student and teacher attendance rates, high school student attrition rates, student discipline data, parent/student survey results, and teacher survey results.

The dashboard will be targeted to individual schools as well as compiled to allow school-to-school comparisons. Comparative dashboards will be presented in a user-friendly graphical format to quickly reference school performance levels. The data will provide immediate feedback to identify schools in need of immediate intervention.

School Value-Added Scores

The school value-added scores will be calculated as described above in Element 1.1. The principals and assistant principals will be held accountable for ensuring that their schools reach a minimum value-added score each year.

Parent/Student/Teacher Surveys

Confidential parent and student surveys will be sent out every nine weeks through multiple communication venues such as online, print media, and/or telephone contact. The ten-question survey will be designed to measure the parent and student perceptions of the climate of the school and interactions with teachers and administrators, as well as academic achievement levels. Confidential teacher surveys will be issued at the completion of the teacher's evaluation as discussed in Element 1.4.

Performance Rubric

The principal performance rubric will be designed to correspond to the teacher performance rubric as described in Element 1.2. The domains of the rubric will be as follows: organizational/school management, instructional leadership, professional growth and responsibility, interpersonal skills, and leadership skills. The dimensions under each domain will be customized for the principal and school administrator roles. Just as with the teacher performance rubric, clear and well-defined indicators will be developed for each dimension under the five numerical performance levels.

The school administrators will be appraised in September and formally evaluated in February of each year. District administrators, including area superintendents, will be the reviewers for all principal rubric assessments.

Element 1.5 Timeline	
Establish standards	Fall 2010
Roll out	Summer 2010

Exit Ineffective Teachers

Relying on the assessment system detailed above, TPS will set exacting performance standards against which all teachers will be measured. The performance standards will be developmentally appropriate for probationary and career teachers.

TPS will implement and enforce adherence to these standards to avoid harm to the students. District administrators and principals will be required to clearly communicate expectations to their teachers, make it known that ineffectiveness will not be tolerated, document the performance of every teacher, and be held accountable for enforcing the rules when expectations are not met. Consistent documentation of performance for every teacher in the school is key to this strategy so that when a teacher falls below the acceptable levels and the exiting process is activated, compliance with due process procedures is not at issue since the teacher, principal and the district are all aware of the teacher's performance.

Current state law requires principals to provide a plan of improvement for all teachers who fail to meet expected standards, but this plan may not exceed two months. In order to provide sufficient time for actual improvement, TPS will work with state officials to introduce legislation in the next session to extend the maximum period for a plan of improvement to one year.

Probationary and career teachers will be aware of their developmental needs well before their formal evaluation because they will be developmentally appraised with the same assessment tool prior to being consulted regarding their formal evaluation results. Along with their principal, mentor teacher, and Professional Learning Team (PLT) Leader (discussed in Element 3.1 below), they will tailor a personal development plan to improve their effectiveness in the classroom. If their next formal evaluation does not bring them into the acceptable range, they will be dismissed. If the teacher has demonstrated progress, but falls slightly short of the standard, the principal and district administrators will have discretion as to the exiting decision.

Exit Ineffective Leaders

Principals and assistant principals will also be held to a set of performance standards that will include ensuring that their school is performing up to expected achievement levels. These standards will be clearly communicated to all leaders at the outset of their term and as needed for reinforcement. An effective leader will be expected to show a school value-added score that meets or exceeds a specified minimum score each year as well as meeting Federal AYP (Annual Yearly Progress) standards for graduation rates, student test scores, and attendance. They will also be required to have a score on their performance rubric evaluation that meets or exceeds district standards. Developing leaders will be permitted to achieve at a slightly lower standard in their first year, but will be expected to reach the district standard of effectiveness in the following year. Leaders who do not attain these levels of performance will be counseled toward the appropriate development activities, but will be exited if they do not reach expectations.

Element 1.6: Exit Ineffective Teachers and Leaders	
Communicate	Summer 2009 and forward
Develop exit decision process	Summer 2009 – Spring 2010
Set minimum performance standards and train leaders	Summer 2010
Roll-out exit process	Spring 2011 and forward
Track and Refine	Summer 2011 and forward

Initiative 2: Deploy and Motivate
Vision: To ensure that every school is staffed with highly effective, strongly motivated, and competitively compensated teachers and leaders to positively impact student achievement with an emphasis on the most challenged schools and classrooms.

Current Practices

Since it does not have a consistent, reliable, and transparent method of measuring teacher effectiveness, TPS does not currently reward its most effective teachers or strategically place them in front of LIM students.

The starting salary for teachers with a bachelor's degree is $32,900. This places TPS behind other districts in the region whose average starting pay is $34,900. TPS currently pays teachers based on a traditional salary schedule with 37 steps and 5 lanes. Teachers receive additional compensation for non-performance-based factors including degrees earned degrees earned, credited years of teaching, and certifications such as National Board rather than their ability to lead students to academic and collegial success. Studies such as those found in *Indicators of Teacher Quality* by Dominic J. Goldhaber and Dan D. Brewer clearly demonstrate that the mere attainment of a Master's degree does not improve student achievement. Their study did note that teachers who earned a Master's degree in their grade or subject's content specific area sometimes demonstrated increased effectiveness, but no other degree programs showed the same effect.

Furthermore, like the students in New York State studied by Lankford, Loeb, and Wyckoff, TPS' LIM students do not always receive instruction from the most effective teachers. This is evidenced by the significant achievement gaps along racial/ethnic and socio-economic lines. TPS has no district-wide policies in place to address this problem.

In an effort to build a system that supports and rewards positive performance in the classroom, TPS proposes the following changes to the processes for deploying and rewarding teachers.

Initiative 2 Components:	Gaps Addressed:
• Enhance compensation by instituting substantial performance incentives for effective teachers and leaders • Deploy the most effective teachers and leaders to LIM students in each school and deploy teams of the most effective leaders	• 26% of teachers leave in the first year of teaching, and those that leave are likely more effective on average than those who stay • Current salary schedule is composed of non-performance-based factors

and teachers to the most challenged schools	• 47% of teachers surveyed cited "unsatisfactory compensation" as the top 1, 2, or 3 factor in decision to leave the district • 100% of teachers identified as "not highly qualified" teachers are assigned to most challenged/low performing schools

In order to accomplish these goals, each strategy will rely heavily on the engine of the teacher effectiveness mission: the outputs of the assessment system. Without identification of effective and ineffective teachers, the district and principals will not be able to place and keep effective teachers in front of students.

Element 2.1: Revamp Teacher Compensation Structure

Compensation Structure

To attract a large pool of high-potential candidates and compete with neighboring districts, TPS will raise the starting salary to $36,000, a level above the regional average.

To address the high turnover rate among early career teachers, their salary will increase by $1,000 each year for the first four years, reaching a base pay rate of $40,000. Additional increases will occur in later years (e.g. $1,000 in year 19) in order to remain in compliance with Oklahoma state pay minimums across all degree levels. No salary increases will be awarded for advanced degrees or additional certifications.

This enhanced base pay structure will create a two-fold support of the initiative to attract more effective teachers from the available pool as well as retaining new teachers during the first five years of their career. Chad Aldeman noted in his article, *Ladders of Success: Keeping Teacher Pay on Schedule,* that this period is when teachers show the most significant increases in teacher effectiveness.
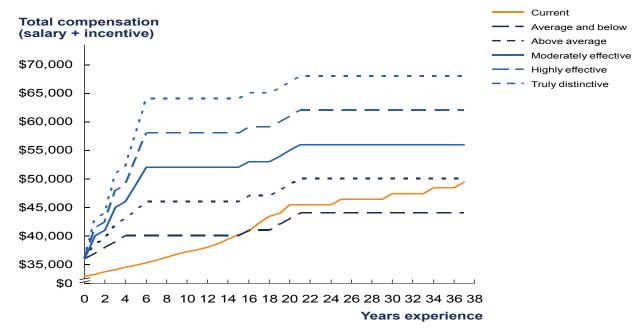
To further support the retention and motivation of effective teachers, TPS will also provide significant performance incentives based on three metrics. There will be four levels of performance for each metric that will receive incentive payments: individual student-growth measures, individual evaluation ratings, and school-based student-growth measures. Student-growth measures will be derived from a combination of teacher or school value-added scores and a calculated "student risk" factor that accounts for each student's growth potential. The "student risk" factor is a new measure that TPS will create with its value-added vendor to be reliable and accurate.

The student-growth measure will indicate the gains in student achievement resulting from the effectiveness of the teacher, accounting for factors outside of the teacher's control. Student-growth measures will be largest for students who make the greatest gains over the course of the school year. Therefore, effective teachers who instruct the district's most challenged students will have a larger student-growth measure that they would if they instructed a group of less challenged students. Teachers with larger student-growth measures will earn larger performance incentives. This creates impetus for TPS' most effective teachers to instruct the most challenged students in that they could earn up to twice as much in incentives.

Teachers with individual student-growth measures (i.e., teachers in core testing subjects) will be eligible for incentives ranging from $1,750 to $24,000 per year. Up to $10,000 of the incentive will be based on individual student-growth measures. Up to $7,000 will be based on individual evaluation ratings and up to $7,000 will be based on school-based student-growth measures.

Teachers who do not have individual student-growth measures will be eligible for incentives ranging from $1,750 to $14,000. Up to $7,000 will be based on individual evaluation ratings as well as another $7,000 for school-based student-growth measures.

Figure 11 illustrates the annual compensation a teacher with individual student-growth measures could earn at each of the four incentive levels in comparison to current bachelor's degree compensation.

Figure 11: Lifetime Earning Potential: New v. Current System

Under this enhanced compensation structure, teachers who are the most effective and are teaching grades or subjects with individual student-growth measures will receive up to $64,000 (base salary + incentives) annually. This translates into over $300,000 more dollars in discounted lifetime earnings if the teacher remains effective over a 37-year teaching career versus the same teacher under the current compensation structure. Under the enhanced structure, effective teachers with individual student-growth measures at the lowest incentive level would receive $46,000 (base salary + incentives) annually, accounting for $80,000 more in discounted lifetime earnings. Teachers who do not receive an incentive will have only $3,000 less in discounted earnings.

Since this initiative is one of the most controversial of the initiatives, TPS has carefully outlined each element of the enhanced compensation system. See the explanations of each element in Figure 12 below. Each of these elements are subject to negotiation with every effort made to always place the needs of students first.

Figure 12: Elements of the Compensation System

Retirement	• Legislation will be introduced to count incentive bonuses as base pay for retirement purposes • Legislation will be introduced to make retirement based on five highest compensation years, not just five highest consecutive years
Eligibility	• Teachers with individual student-growth measures will be eligible in third year at TPS • Teachers with school-based student-growth measures (based on one year) and individual evaluations ratings will be eligible in first year at TPS • Only certified staff will be eligible for incentive pay • Only teachers with an acceptable evaluation score will be eligible for school-based incentives, this standard will be set in Spring 2010 • Staff serving multiple schools receive a pro rata share of school-based incentives based on their percent of time spent at each school
Opt-In	• Existing teachers choose whether or not to opt into new system • Probationary teachers (new to teaching) are automatically enrolled in new system • Probationary teachers (new to TPS) are automatically enrolled in new system but with a hold harmless clause based on where they would fall in existing TPS salary schedule • There will be no opt-out provision once enrolled
Salary Base v. Opt In	• All existing teachers who opt in are held harmless (e.g. a teacher making $50,000 in 2009-2010 will always make at least $50,000). • Teachers who do not opt in will continue to move up steps on the salary schedule but not be eligible for the bonuses.
Bonus Standard/Size of Pool	• TPS will commit to clear bonus pool size for next ten years in fall 2009 • Bonus pool size will increase over ten years to accommodate increasing teacher effectiveness • Each year, a joint TPS/TCTA will recalibrate the bar for performance incentives to match payouts to available bonus pool • This calibration will be clearly communicated to teachers in the summer of each year so they will know the standards for incentive pay
Special Teacher Populations	• Legislation will be introduced to ensure state 5% bump for Special Education and Alternative Education teachers applies to total compensation and not just base pay • Legislation will be introduced to ensure state 30% bump for KIPP (Knowledge is Power Program) teachers applies to total compensation and not just base pay
Funding for New v. Old Schedule	• Aside from the bonus pool increases shown above, additional state and local funding allocated for salary increases will be allocated proportionately to new and old schedule (i.e., 3% funding for both)
Threshold for Incentives	• A joint TPS/TCTA team will develop performance standards and thresholds for incentives • The threshold for receiving incentive pay will be greater than a minimum value added score and/or greater than a minimum evaluation rating • There will be multiple levels of incentive pay • The top level of incentive pay will apply to approximately 5 percent of the teaching force

In order to earn teacher confidence in this new compensation system, existing TPS teachers will have multiple opportunities to choose whether they want to opt into the system or not. The first opt-in phase will occur in the summer of 2010 after all teachers have been assessed and evaluated with the new assessment system. Teachers will have an opportunity to review their student-growth measures as well as a calculation of what they would have earned that year in the new compensation system (base pay + incentives) compared to what they did earn. The teachers that opt-in that summer will be paid according to the new compensation structure for the

upcoming year and in the future, knowing that they will be held harmless as to their base salary per state law.

Teachers who have not opted in will have the opportunity to observe and discuss the impact of the compensation system during the following year. At the end of that year, they will again be presented with a comparison of what they would have earned in the new compensation system versus the old schedule. Teachers may then select to opt into the system for the upcoming year.

It is anticipated that by the summer of 2012, the new compensation system will be fully implemented, but the choice of whether they want to opt into the new system will remain with the existing teacher. An annual opt-in period will occur each summer until every teacher is on the new compensation schedule. Once enrolled, however, there will be no opt-out option.

Element 2.1 Timeline	
Establish structure	Fall 2009 – Summer 2010
Roll-out: Probationary teachers + Opt In (Phase 1)	Summer 2010 and forward
Track and Refine	Summer 2010 and forward
Roll-out: Probationary teachers + Opt In (Phase 2)	Summer 2011 and forward
Operate at full scale: Probationary teachers + annual Opt In	Summer 2012 and forward

Element 2.2: Revamp Leader Compensation Structure

Performance-Based Compensation

As with the current teacher compensation structure, the current school leader compensation structure is based largely on non-performance-based factors like experience and length of service rather than performance. Performance incentives are in place for high school principals, but in 2007-08, only three of nine principals received an average of $7,600 in incentives based on 11 outcome measures. These measures, which include teacher attendance, graduation rate, and ACT scores, were selected based on limited research and dialogue with principals.

Beginning in school year 2010-2011, TPS will implement a performance-based compensation structure for school leaders that rewards demonstrated effectiveness rather than experience, structured to align with teacher compensation but based on different metrics. Base salary levels will be determined by three factors: school type (elementary, middle, high, alternative), school size (small (<500) or large), and contract type (200 day or 12 month). These will be set to keep the new structure (base + incentives) within the current leader compensation budget. As a result, some school leaders will have a lower base salary than their current compensation, but they will be able to earn performance incentives to make up the difference. An annual percentage raise will be applied to base salary in the same manner that it is calculated today.

All school leaders will be eligible for incentives and be required to participate in the first year of the program.

Element 2.2: Timeline	
Enhance Compensation System	Fall 2010 and forward

Element 2.3: Deploy Effective Teachers and Leaders to LIM Students

Intra-School Deployment of Effective Teachers:

TPS will increase the percent of teachers who taught advanced courses last year who are teaching core classes this year. Going forward, the district's most effective teachers and leaders will be identified and will be directed to core classes and transition year assignments.

In the spring of 2010, principals will be tasked to re-examine their assignment strategies within their school using the new assessment system. For the 2010-2011 school year principals will ensure that all of their most effective teachers are teaching at least two sections of core classes. They will also ensure that their highly effective teachers are teaching students in the critical transition years of 6th and 9th grade where TPS currently suffers significant drops in student achievement.

As previously discussed, the most effective teachers will be motivated to teach core classes because of the opportunity for additional performance incentives from individual student-growth measures.

Inter-School Deployment of Teams of Effective Leaders and Teacher-Leaders:

For the 2010-11, 2011-12, 2012-13 school years, TPS will identify the three most challenged schools each year (one elementary, one middle and one high school) and will select and place an effective principal and a team of effective teachers in those schools to implement the changes necessary to improve student achievement. The most challenged schools will be identified initially based on teacher turnover rates and other indicators such as increased discipline problems and their API scores. Once value-added scores are available for data analysis, that data will be used to pinpoint the schools in need of intervention. In November of 2012, TPS will evaluate the program to determine if it should be expanded to additional schools.

Effective principals will be identified through an examination of their assessment outcomes, including value-added measures and performance rubric ratings. Further analysis of their potential for success in urban settings will be completed based on previous successes in schools with similar challenges. Once a pool of eligible candidates has been established, district administrators will individually select and recruit the principals by thoroughly explaining the challenges they would face while marketing a vision of success at that school. Principals who choose to take on that challenge will be assured of support from the district administration as well as the opportunity to hand-select a team of teachers to join them. Within this process, great care will be taken to lessen the impact on successful schools. When effective leaders and teachers are selected from another school, they will be replaced with equally effective leaders and teachers.

Selected principals will have access to a database listing the most effective teachers in TPS, based on assessment outcomes, who have applied to be selected for a deployment team. Principals will have the opportunity to interview and meet with the teachers individually to ensure that they share the same vision and commitment level and will personally recruit that teacher to join the team. Teachers will be deployed in teams of no less than four to ensure that they have a group of colleagues that share their vision and commitment.

Selected teachers will be assigned the role of the Professional Learning Team Leaders (role defined in Element 3.1 below) at the new school. The stipend for this role will increase from $1,800 (the district standard) to $10,000 per year. Selected teachers who do not demonstrate success in meeting the minimum standards of effectiveness at the new school will be removed from this role and will not receive the stipend. The role will be guaranteed this higher stipend for three years. At the end of the three years, the district will determine if the school has improved sufficiently to be removed from the most challenged list, thereby rolling back the stipend to the district standard. Once the stipend has been rolled back, the Professional Learning Team Leader may then decide to stay at the school with the reduced stipend or apply to be deployed to another challenged school.

The academic progress at these schools will be closely tracked and monitored to ensure that student academic achievement is improving. As with all schools, the principals will be held accountable for addressing any problems or barriers that impede progress and immediate action will be taken in schools that do not demonstrate satisfactory improvement.

Element 2.3 Timeline	
Develop intra-school plan	Fall 2009
Roll-out intra-school plan	Spring 2010 and forward
Track and Refine intra-school plan	Summer 2011 and forward
Develop inter-school plan	Fall 2009
Pilot inter-school plan (3 schools)	Spring 2010 –Spring 2011
Track and Refine interschool plan	Summer 2011 and forward
Roll-out inter-school plan (3 schools per year)	Spring 2011 and forward

Initiative 3: Develop
Vision: To create a culture of quality, tailored and cooperatively-interactive professional development through peer coaching, modeling, and reflective practices providing each individual teacher and leader with the necessary skills, knowledge, and ability to succeed with urban populations.

Current Practices

With no system of measuring the effectiveness of teachers, TPS has no reliable method of determining the strengths and weaknesses of its teachers that will inform the professional development courses and programs necessary to elevate the effectiveness of its teacher corps. Current development offerings, therefore, are not tied to a strategic development of teachers but rather their weaknesses as perceived by the Professional Development department.

Course offerings are inconsistently tied to the site-based School Improvement Plans (SIP) developed by the SIP district consultant, principals and teachers for all schools. Rather than strategically selecting professional development courses based on their documented areas of weakness, roughly 25% of teachers base their selection on their personal schedules or which courses sound interesting.

> *"Teachers must be given ample opportunities for professional development in the areas that they need; not what the district/building principal dictates." – TPS Teacher*

Additionally, principals are so busy dealing with issues of building management and discipline that they lack the time to devote to instructional leadership.

TPS will implement three data systems to enable this initiative: a professional development/learning management system, a knowledge management system, and a decision-driver system.

Initiative 3 Components:	Gaps Addressed:
• Implement data informed and goal oriented teacher meetings, led by teacher-leaders, directed at improving student outcomes • Create online database of knowledge sharing to improve student achievement • Implement data-driven system for selection of development courses and programs tied to teacher performance • Refine principal role as instructional leader	• Principals spend 47% of their time on building management/discipline, only 24% on interactions with teachers • Development curriculum not tied to teacher assessment outputs • Effectiveness of development training not tied to increased student achievement • Limited integration of site based School Improvement Plans or with district development structure

According to the 2007 report by Sir Michael Barber and Mona Mourshed, there are three keys to success in developing effective teachers. First, individual teachers should be aware of their own strengths and weaknesses as a teacher. Second, individual teachers need to know and understand best practices as modeled and demonstrated in an authentic setting. Third, individual teachers need to be motivated to become effective through material and non-material incentives, high expectations, a shared sense of purpose and a collective belief in their ability to make a difference.

Tulsa will shift the focus of professional development from the central office department to the schools themselves. Principals, teacher-leaders, and teachers will work together to identify the strengths and weaknesses at their schools, design improvement plans to bring about greater levels of effectiveness and seek supplemental help from the central office sources. The central office will work primarily to design offerings that assist the school-based learning teams in learning how to work together as well as instructing teachers how to implement district-wide initiatives and reforms. Their secondary purpose will be to design supplementary opportunities for teachers to work independently to increase their effectiveness.

Professional Learning Teams

In order to foster building level growth and improvement, Professional Learning Teams (PLT) will be instituted or repurposed at each school site to act as a more content- and data-driven alternative to district-wide professional development initiatives. The PLTs will also act as the communication vehicle that drives the implementation of all district-wide initiatives including Secondary School Reform and ACT/Rigor and Readiness.

The primary purpose of a Professional Learning Team (PLT) at each school will be to create a clearly structured community for data analysis and instructional improvement to bring about increased student achievement. The leaders of the Professional Learning Teams will utilize the time they have with their teachers to facilitate discussions that share ideas and workshop solutions to improve deficient student achievement, classroom management issues and other areas of weakness for the teachers on their team.

> *"I need feedback. I pretty much need constant feedback." – TPS Teacher*

Facilitation of these meetings will be accomplished by re-purposing contracted preparation time, designed differently based on the various needs of elementary, middle and high school schedules. Additionally, three of the six days appointed as Professional Development days within the district will be reallocated as PLT days to allow for school and district level PLT meetings.

Professional Learning Team Leader

The facilitators of the Professional Learning Teams (PLTs) at the schools will be the PLT Leaders. Currently, there is no standardization for the role, selection, and allocation of teacher-leaders and department chairs across the district.

TPS will consolidate the roles of teacher-leader and department chair and create a district standard for the position of the PLT Leader. They will observe, give feedback and model for their team of 4-7 teachers in addition to meeting with them weekly to have data-driven discussions and strategy sessions. PLT Leaders, along with the principals, will be held accountable for ensuring implementation of the practices learned in team meetings and modeling sessions. In addition, the PLT Leaders, with the cooperation of the principal, will be responsible for proactively identifying potential problem areas and bringing in interventionary professional development assistance before a crisis situation arises at the school.

PLT Leader eligibility requirements will include:

- Minimum of 3 years teaching experience
- Minimum or higher value-added score in most recent year, where applicable
- Minimum or higher score on most recent performance evaluation
- Exhibits use of research-based and best practice teaching
- Demonstrates effective oral communication with peers, parents and students
- Anonymous peer support (impression feedback from at least four colleagues)

Once selected by the principal, the PLT Leader, along with the building administrators, will be required to attend a four-day introductory training and monthly half-day sessions for the first year. Subsequent training will be as needed to inform PLT Leaders on district initiatives and refresh leadership, collaboration, co-constructive, and cognitive coaching skills.

The allocation of PLT Leaders in a school will be based on the total number of teachers in a school, ensuring that no PLT Leader is responsible for more than 4-7 teachers.

Element 3.1 Timeline	
Develop PLT strategies	Fall 2009
Identify and Train PLT Leaders	Spring 2010 – Summer 2010
Roll-out	Fall 2010 and forward
Track and Refine	Spring 2011 and forward

Element 3.2: Knowledge Management System

Knowledge Management Systems:

In her work *Does Lesson Study Have a Place in the United States?,* Dr. Catherine Lewis quoted a teacher in Japan as saying that "[w]hen a brilliant American teacher retires, almost all of the lesson plans and practices that she has developed also retire. When a Japanese teacher retires, she leaves a legacy." In order to support the culture of collaborative development and to combat teacher apathy to sharing, TPS will implement a user-friendly online interface for knowledge sharing, including lesson plans and modeling videos. The system will be created to include a rating feedback program that self-identifies effective materials based on user review.

Element 3.2 Timeline	
Develop bank of materials	Fall 2009
Post content on existing database/collect feedback	Spring 2010
Infrastructure build-out	Summer 2010 – Spring 2011
Lesson/content collection and posting (focus on Algebra I, 4th/5th grade Social Studies/Science)	Fall 2010 and forward .
Roll-out: lesson/content collection and posting	Spring 2011 and forward
Track and Refine	Spring 2011 and forward

Element 3.3: Data-driven Development Offerings

Data-Driven Course Decisions

The primary work of the district professional development department will be to design offerings that will help schools facilitate Professional Learning Teams (PLTs) as well as acting as the conduit for the implementation of district-wide initiatives. The secondary work of the

professional development department will be to design supplementary opportunities for individual teachers based on the areas of strength and weakness across the district identified through the assessment tools, Site Improvement Plans, and PLT collaborations.

Suggestions for Development Offerings

TPS will also utilize the outputs of the assessment system to tie suggested development offerings to the teacher evaluations that specifically address the individual teacher's areas of weakness. In order to prevent the time expensive process of individuals searching through offerings and research digests to address their needs, the professional development department will be responsible for identifying and suggesting courses and activities that are proven to address specific areas of weakness and improve student achievement. They will then input those connections into a data system that will assign three to four course/activity suggestions for each area of weakness to the teacher's formal evaluation. By automatically populating suggested courses and activities, the data system will allow the teachers and principals to use their time more effectively by designing an individualized professional growth plan for the teacher.

Element 3.3 Timeline	
Develop system of data analysis to design courses/programs	Fall 2011 – Spring 2012
Tie development suggestions to teacher performance evaluations	Fall 2011 – Spring 2012
Track and Refine	Spring 2012 and forward

Element 3.4: Transition Principals into Instructional Leaders

According to a survey of all TPS principals, 30% of their time is devoted to facilities building management, 16% to discipline, 13% to strategic planning and professional development, while only 24% of their time is spent in instructional leadership and 16% is spent off site.

TPS will implement the new position of a School Administrative Manager (SAM) to free up the principal's time. With the aid of a SAM in the building, TPS principals will be able to reallocate their time so that 65% of their day is spent in instructional leadership. More of their time will be spent observing, appraising, developing and providing feedback to the teachers in their building. The revised principal responsibilities will include:

- Cognitive coaching
- Classroom/building walkthroughs
- Data informed PLT interactions
- Challenging meetings (IEP, parents, discipline, student safety)
- Strategic planning
- Community outreach

Depending on the school setting and population, the SAM will work in conjunction with principals, assistant principals, and/or counselors to perform the following duties:

- Facilities usage (cafeteria, buses, lockers)
- Finance/budget management
- Secretarial staff management
- Volunteer management
- Student social services referrals and safety
- Routine parent meetings

"Having another person to assist with some of the 'administrivia' would enable me to spend more time in the classroom serving as an instructional leader." – TPS Principal

SAMs will be piloted in 15 schools in the 2010-11 and 2011-12 school years. Upon completion of the pilot, principals will be able to select if they want to implement a SAM at their school based on their budget and their ability to devote 65% of their time to instructional leadership. Principals will be made aware of the benefits of implementation through both district administrators and pilot principals. District administrators will have discretion to dictate implementation for underperforming principals. Schools and principals will be continually monitored to ensure that the SAMs are being properly utilized to improve instructional leadership.

Element 3.4 Timeline	
Interview and hire SAMs	Spring – Summer 2010
Train principals on new role expectations	Summer 2010
Pilot SAMs in 15 schools	Fall 2010 – Spring 2012
Roll out	Fall 2012 and forward

Initiative 4: Attract
Vision: To increase the numbers of available teacher candidates while refining the screening processes that identify the highest quality candidates dedicated and committed to working in an urban setting.

Current Practices

TPS must fill 400-450 positions each school year. A team of two recruiters attends career fairs at the local universities that offer education degrees. Based on recruiter interviews, their portfolio and GPAs, a select number of candidates are offered early offer contracts beginning in October and November and again in March and April.

This process results in unacceptable rates of attrition. Figure 13 illustrates that of the 209 early offers extended, less than 33% (69) begin teaching in the district and less than 22% (47) are still in the district after two years. Additionally, in 2007-2008, TPS hosted 51 student-teachers, but only 18% (9) accepted teaching positions and are still teaching in the district after two years.
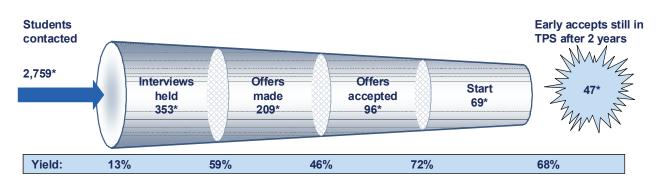
Figure 13: Interviews and Early Contract Offer Results

Though there are many explanations as to why so few actually take a teaching position in TPS, one factor, over which TPS has control, is that principals are unable to guarantee a specific assignment for candidates to whom an offer is extended. District policy requires that teachers within the district (transfers and trims) be given the opportunity to interview for open positions before positions are truly accessible to new hires. Further, the lists of eligible transfer and trim teachers are not fully created until April, well after many high potential candidates have already committed to positions in neighboring districts. Transfers and trims are officially closed on June 30 and principals are then tasked to fill the remainder of their open positions from the now limited new hire candidate pool.

Initiative 4 Components:	*Gaps Addressed:*
• Align internal administrative processes • Improve candidate quality through screening processes, evaluation criteria, and interviewer selection/training • Increase the applicant pool and yield from traditional sources through branding and relational recruiting • Expand sources of new teachers to include urban institutes, paraprofessional, and alternative certification programs	• Only 22% of early offers accept jobs at TPS and are still teaching after two years • Only 51 student-teachers each year, and only nine (18%) accept teaching positions and are still teaching after two years • No teachers assigned to a school or classroom before June, teachers who sign early contracts lack certainty regarding placement • Candidates are reluctant to apply because of the urban setting

Barber and Mourshed noted that the "selection of a bad teacher can result in almost 40 years of bad teaching in [a] district." It will become the expectation in TPS that the hiring of an ineffective teacher is unacceptable. While it is impossible to predict with 100% accuracy the success rate of a new teacher simply through the hiring process, TPS will embark on transforming its recruiting processes to include tools that will help create a pool of candidates of the highest caliber so that those hiring will only have to choose between excellence and more excellence. Additionally, the internal processes that dictate hiring timelines will be refined so that new teachers can feel connected to the district and principals nearer to the date they accept a contract.

Align Internal Administrative Actions

Beginning in 2009-2010 school year, principals will receive their staff allocations for the following year in January. By early second semester principals will be required to create a draft of their master schedule for the upcoming year and notify teachers who will be trimmed. These teachers will be placed in an internal hiring pool that includes teachers who have applied for a transfer. Once this pool has been created, open positions will be made public to both internal and external candidates. Principals will be free to interview and select any candidate, whether internal or external. Offers and acceptances will be communicated to the proposed Human Capital office, which will be responsible for tracking open positions and removing notifications for positions that have been filled. If the district reaches a point where the number of open positions in a specific area (e.g., middle school science) does not exceed the number of internal candidates certified for that area, the Human Capital office will notify principals that those positions should be filled with internal candidates only.

Principals interviewing for open positions will have access to a database that includes the evaluation and value-added scores of internal candidates as well as the application materials and screening tool results for new hire candidates. They will be expected to utilize this information to identify high-potential candidates who will be interviewed.

The New Teacher Project Model Staffing Initiative (MSI)

TPS will contract with The New Teacher Project's Model Staffing Initiative (MSI) to provide two staff members who will train Human Capital staff, recruiters and school leaders in the art of staffing schools with effective teachers, while focusing on high-needs schools. MSI will utilize the train-the-trainer model to help transform the internal processes of the central office that pertain to hiring. MSI will focus on helping TPS incorporate the following strategies, so that at the end of MSI's contract, TPS will be able to sustain these more effective practices:

- ▪ Streamlining hiring timelines and practices
- ▪ Training principals how to interview and select effective teachers
- ▪ Developing feedback systems and focus groups to evaluate and refine hiring processes
- ▪ Providing as needed assistance for critical need schools

Element 4.1 Timeline	
Revise district allocation and hiring processes	Fall 2009
Contract with TNTP Model Staffing Initiative	Spring 2010
Institute data-base for principals to easily identify high-potential candidates	Spring 2011 – Spring 2012

Gallup Teacher Insight Tool

In order to add another evaluation tool principals may consider in order to assess teacher candidates, TPS will add the Gallup Teacher Insight potential research based assessment tool.

Applicants will be required to answer 200 questions to determine their potential to be successful in an urban teaching environment. Recent data shows that 88% of teachers who scored in the top quartile were likely to achieve student gains of one or more grade levels. After 40 years of research, Teacher Insight is now utilized in more than 300 school districts across the country.

The Gallup Teacher Insight tool allows principals to evaluate the candidate based on an examination of the objective survey results that may indicate their success in the urban classroom. Additionally, Gallup will provide the district with a detailed summary of statistics at the end of each hiring season to enable a detailed analysis of which factors predict the highest level of teacher effectiveness, which will in turn improve the screening process for candidates.

Teach for Tulsa Day

Even before the pool is narrowed for principal selection, teacher candidates will be selected based on their portfolio, GPA, and Gallup results to participate in *Teach for Tulsa Day*. *Teach for Tulsa Day* will have a three-fold purpose of marketing TPS to potential candidates, providing principals with the opportunity to interact with the candidates, and providing the candidates the opportunity to interact with TPS students and staff.

Teach for Tulsa Day will be scheduled three times per year, twice in the fall, and once in the spring, with invitations being presented to about 100 candidates per session. After a morning welcome session and break-out question and answer sessions, the teacher candidates will be transported to pre-selected schools and classrooms where they will be able to witness the interactions of teachers and students in TPS as well as be able to experience the positive and safe climate of the schools.

After lunch, teacher candidates will have an interview with two principals and one Human Capital representative. In addition to the interview, candidates will be required to present a five-minute sample lesson that they have pre-prepared on a subject of their choosing in front of the interviewers as well as other candidates.

Those candidates who demonstrate significant interest and aptitude to succeed in TPS will be connected with a recruiter and scheduled for interviews with hiring principals. Candidates who do not participate in *Teach for Tulsa Day* will not be penalized in the hiring process, but those that did participate will be placed in the first tier when a list of preferred candidates is given to the principals interviewing for open positions.

Finally, TPS will evaluate the various components of *Teach for Tulsa Day* to determine which are the best predictors of success in the classroom.

Element 4.2 Timeline	
Develop "Teach for Tulsa" Day	Fall 2009
Gallup Teacher Insight Tool Roll-Out	Spring 2010 and forward
Pilot "Teach for Tulsa" Day	Spring 2010
Hold "Teach for Tulsa" Days	Fall 2011 and forward

Relational Recruiting

TPS will seek to draw in candidates who may not have considered TPS before by putting the face of TPS teachers at the universities where they are earning their degrees. Approximately 30 current teachers will be selected to act as part-time recruiters at local universities. They will attend career fairs, maintain personal contact with interested candidates as well as those who accept early offers, and arrange for candidates to shadow themselves and other effective teachers in TPS classrooms. By maintaining contact with the candidates, relational recruiters will help to solve the problem of early offerees feeling unwanted and unconnected to the district before they are placed with a school.

Relational recruiters will focus not just on candidates preparing to graduate, but will begin recruiting possible candidates in their sophomore and junior years. The purpose of engaging the students earlier in their college career is to encourage potential candidates to do their student teaching in TPS, and make it more appealing thereby increasing those numbers.

Finally, the relational recruiters will expand the scope of the normal candidate they would pursue by acting to recruit potential teachers with an emphasis on minority candidates and those who are or could be certified to teach in hard to staff positions such as math, science, foreign languages, ESL, and special education. These potential candidates will include career changers who excel in the content area.

Element 4.3 Timeline	
Identify and train Relational Recruiters	Spring 2010
Roll-out Relational Recruiters	Fall 2010 and forward

Expand Sources of New Teachers

Teach for America

In April of 2009, TPS was selected as a *Teach for America* site. Currently TPS has partnered with local community foundations to support 75 TFA teachers who have already participated in orientations and training in Tulsa. TPS will implement strategies to leverage the connections the TFA teachers made with the Tulsa community to use their influence to recruit students from their alma maters to teach in Tulsa. TPS plans to increase the number of TFA teachers from 75 to 100 per year.

Urban Institutes

TPS is partnering with Oklahoma State University (OSU), Northeastern State University (NSU), and Tulsa Community College (TCC) to create Urban Institutes in their Colleges of Education. OSU will concentrate on creating a Master's degree program that recruits career changers interested in pursuing teacher certification, NSU will focus on students pursuing their Bachelor's degree in education, while TCC will present opportunities to high school seniors and

others interested in education to pursue their degree prerequisites. All three schools have campuses in Tulsa where the Urban Institutes will be housed. Many of the courses offered as parts of the Institutes will be taught on-site at TPS schools. Highly-effective TPS teachers who qualify will be able to participate as mentor-teachers and adjunct faculty.

Students will participate in multiple and extended on-site observations early in their college career rather than just in their final year. Additionally, students will be required to complete their student-teaching requirements in a Tulsa Public School.

OSU, NSU, and TCC are jointly pursuing federal grants and alternative funding to support their programs independently so that TPS incurs no expenses.

TPS anticipates that 60 new teachers hired each year will come from these Urban Institutes.

Paraprofessionals

TPS has a staff of paraprofessionals who by the nature of their job selection have demonstrated a desire to work with students, a commitment to an urban school district, and have ties to the local community. TPS will leverage those three characteristics to provide opportunities for these paraprofessionals to earn their degree and their teacher certification.

There is an existing policy of reimbursing paraprofessionals for credits earned toward their Associate's degree at Tulsa Community College. The George Kaiser Family Foundation has created a scholarship/loan forgiveness program for the Early Childhood Education certification program in the University of Oklahoma-Tulsa's College of Education wherein the paraprofessionals may earn their Bachelor's degree and certification.

TPS will seek out partnerships with other community organizations to expand the options for paraprofessionals who wish to earn certification for grades and subjects other than Early Childhood.

TPS anticipates that 10 new teachers hired each year will come from the ranks of previous TPS paraprofessionals.

Element 4.4 Timeline	
Develop urban institute	Fall 2009
Expand paraprofessional options	Spring 2010 and forward
Grow TFA to 100 teachers	Fall 2010
Roll out urban institute	Fall 2010 – Spring 2012
Operate at scale	Fall 2010 and forward

Element 4.5: Identify and Recruit Effective Leadership

Development and Recruitment

Years before a new leader is needed, TPS will have already begun the work of developing and recruiting highly qualified candidates. Current principals and administrators will work to

identify potential leaders among their teacher corps through observation and assessments. These future leaders will be encouraged to pursue leadership development courses and activities that will prepare them for roles as a Professional Learning Team Leader, assistant principal, principal, and/or administrator. The teachers tapped as possible school and district leaders, based on their effectiveness and Gallup Principal Insight Tool results, will be placed on preparation tracks such as the Leadership Aspirant Academy, administrator certification, appraisal and evaluation training, and principal mentorships. Those who have completed all leadership preparation tracks will constitute a cadre of prepared and effective leaders available to move into the role of school and/or district administrative leaders as needed.

Leader Selection

When an administrative position comes available, applications will be accepted from the cadre of qualified leaders as well as external candidates. All applicants will be screened, interviewed, and placed in a pool of potential candidates by the Human Capital department. District administrators will collect input from stakeholders such as teachers, current principals, engaged community members, and other administrative officers. The district administrators will use the input to narrow the selection to a list of the top three candidates. Finally, the superintendent will interview the top three candidates and make the final selection.

In order to standardize all interview processes for leadership positions, the Human Capital Department, with involvement from district administrators, principals, and teachers, will create a uniform list of interview questions that will focus the interviews on the characteristics most likely to identify a potential for success in an urban district.

Element 4.5 Timeline	
Roll out	Spring 2010 and forward

Internal Risks and Challenges:

District and Stakeholder Mindsets

The largest obstacle to a successful implementation of the Teacher Effectiveness initiatives is the current mindsets of the employees of TPS.

Despite some notable successes, the Education Service Center, the administrative offices of TPS, still largely exists as a compliance-driven office rather than one focused on supporting schools. In fact, some teachers refer to the TPS administrative offices as the "Dis-service Center" to express their frustration at an institution that drives many initiatives, some of which are helpful, but which collectively overwhelm school-based staff and too often have been implemented with little input from the teachers. Performance evaluations for central office staff and site-based staff are infrequent and not tied to

> *"…its time that we emphasize, once again, that all children can learn."*
> *- TPS Principal*

specific performance metrics. Finally, many TPS teachers, as evidenced by focus groups, believe that measures of effective teaching are hopelessly biased by the characteristics of students in classes or that effective teaching simply cannot be measured.

TPS is in the beginning stages of making a radical transformation from a transactional organization to one that creates performance transparency at all levels while expecting and delivering high levels of achievement from students, teachers, and administrators. TPS School Board will drive the shift in mindsets necessary to support this through a series of mindset workshops for all staff as well as leadership retreats for the TPS School Board and district administrators.

First, TPS will implement the development of a performance culture by facing the challenging mindsets of its employees head on. On July 23, 2009, the first mindset workshop was held with members of the Steering Committee and the Core and Working Teams, including teachers and principals. Beginning in the fall of 2009, the mindset workshops will be held with small groups of all employees, including teachers and support staff, facilitated by an external specialist. The workshops will begin with a time to share TPS experiences followed by a discussion about the influence model and different mindsets. The small groups will then share their current mindsets and discuss what is surprising or missing. Finally, the groups will identify and assign the actions necessary to change or leverage their mindsets to further their own effectiveness, as well as that of the district.

> *"Do you ever ask yourself am I the kind of the teacher that I want my child to have." – TPS Principal*

Second, in order to build a functioning performance-based culture where stakeholders will hold themselves accountable for ensuring success, TPS will purchase texts and instructor's guides for Harvard Education Press' *Managing School Districts for High Performance: Cases in Public Education Leadership*. The book was developed out of the work of the *Public Education Leadership Project* (PELP) at Harvard University, which studied urban school districts to design models that help district leaders use organizational design (structure), human capital management (stakeholders), resource allocation (resources), accountability (culture), and performance improvement systems (systems) to implement coherent improvement strategies.

In the fall of 2009, the TPS Board of Education members and all district level administrators, including the Superintendent, will participate in training. They will form Professional Learning Teams at four leadership retreats during which they will work through the text's modules and study materials. These modules and materials were designed to highlight management principles drawn from authentic cases and use principles that represent effective processes that emerge at the intersection of successful business and educational practices. In the spring of 2010, Professional Learning Teams will be created for school leaders and district support staff to work through the same program, while Professional Learning Teams for teachers will begin the following semester.

The end result of these strategies will be that all parts of TPS, from the Superintendent to the teacher to the engaged community member, will feel connected to the joint mission of making each child academically successful and college-ready.

Implementation and Results

In year one (2009-2010), TPS will document an increase in the number of 4-year graduates passing all four ACT sub-tests (college-ready), bringing the total to 8%. TPS will accomplish this goal by executing the following milestones: piloting the assessment process for all teachers,

holding four days of training for performance rubric reviewers, calibrating the performance rubric and value-added scores, implementing additional tests to increase courses and subjects with value-added data, requiring that 86% of secondary advanced level teachers teach at least one core content course, implementing *Gallup Teacher and Principal Insight Tools*, hosting the first *Teach for Tulsa Day*, deploying 75 *Teach for America* teachers, revising district transfer/trim/new applicant hiring policies, and building a team of 30 full-time teachers/part-time relational recruiters.

In year two (2010-2011), TPS will document an increase in the number of 4-year graduates passing all four ACT sub-tests (college-ready), bringing the total to 10%. TPS will accomplish this goal by executing the following milestones: making available three years of value-added data for Math and English Language Arts teachers, rolling out the new compensation system, exiting ineffective teachers based on a combination of performance rubric and value-added scores in accordance with due process, deploying three leadership teams to the most challenging schools, piloting Professional Learning Teams in nine schools, and piloting School Administrative Managers in 15 schools.

In years three, four and five (2011-2014), TPS will document an increase in the number of 4-year graduates passing all four ACT sub-tests (college-ready), bringing the total to 32%. TPS will accomplish these goals by executing the following milestones: continuing implementation and full roll-outs for all piloted initiatives, making available two and three years of value-added data for all cores subject teachers in grades 3-11, and compiling research to determine how teaching practices and evaluation instruments correspond to student learning.
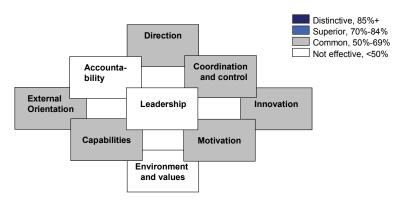
See Appendix A for a detailed chart of all critical execution milestones, outcomes, and related impacts on student achievement and attainment over time.

Organizational Capacity and Partnerships

Capacity Building

TPS understands that the key to building a world-class school district is a culture of high performance culture at every level. Instilling a performance culture at the central office is critical to the success of the Teacher Effectiveness initiatives outlined above. In the summer of 2009, McKinsey and Company conducted an initial diagnostic of TPS using its Organizational Health Index.

Figure 14: Organizational Health Index for Tulsa Public Schools

While showing strength across some areas, this diagnostic demonstrates some clear deficiencies in the areas of accountability, leadership, and environment and values. TPS will conduct a full-scale diagnostic in the fall of 2009 but is moving forward with a series of changes based on this initial diagnostic. These changes will promote two strategic goals:

- All central office staff will have clear, performance-based responsibilities and will be held accountable for meeting these standards
- The central office will provide genuine service and support to schools rather than focusing on compliance.

To achieve these goals, TPS will reorganize its central office effective August 2009. See Figure 15 for an illustration of the new structure.
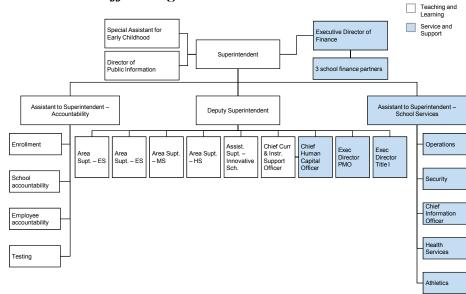
Figure 15: TPS Central Office Organization Structure

To drive the implementation of a performance culture within TPS, the following steps will be taken:

- 5% base pay cut for the 13 highest-level employees of TPS, effective July 1, 2010. Incentive pay tied to their performance metrics will make them eligible to earn up to 10% more than their current salaries.
- Publication of a central office report card, effective March 2010, that will track performance of central office functions, incorporating results of stakeholder surveys.
- Creation of a Program Management Office in September 2009, discussed fully below.
- Receive guidance from Elizabeth Arons, effective September 2009, to guide the redesign of the Office of Human Capital
- Change the hours at the Education Service Center and Fulton Learning Center, effective September 2009, to 7 am to 5 pm to better accommodate the schedules of school personnel.

TPS anticipates additional and continued growth in the direction of a performance culture pending the results of the complete Organizational Health Diagnostic and conversations with the school board and school staff in the fall of 2009.
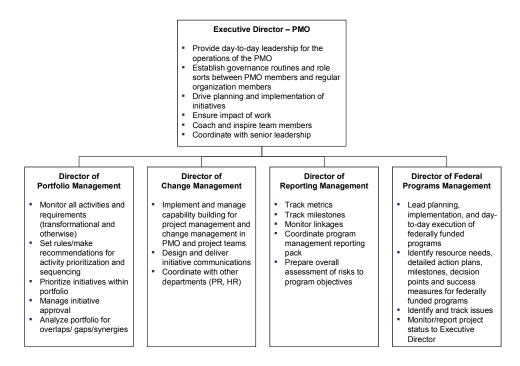
As a result of the changes made to the organizational structure of the district as well as the lessons learned during the development of these Teacher Effectiveness initiatives, TPS further anticipates the continued growth of the collaborative working relationship that now exists between the TPS Board of Education, district administrators, TCTA, and community partners. This relationship will be fostered by constant communication and continual engagement both during and after the implementation process.

Project management

TPS will create a Program Management Office (PMO) as part of its organization redesign. This new office will hold gate-keeping responsibility for all district programs and initiatives in addition to driving planning, implementation, and reporting of priority programs and initiatives. This office will govern the Teacher Effectiveness work.
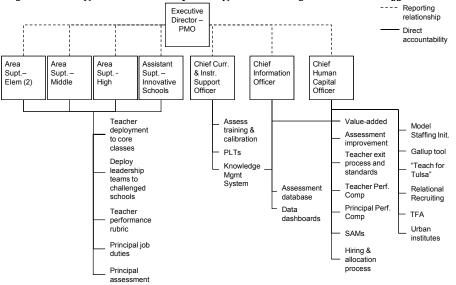
Five full-time roles have been established within the PMO to ensure adequate support and accountability for program and initiative managers in other divisions. Figure 16 details the structure and roles of the new PMO.

Figure 16: Program Management Office Structure and Roles

Executive Director – PMO

- Provide day-to-day leadership for the operations of the PMO
- Establish governance routines and role sorts between PMO members and regular organization members
- Drive planning and implementation of initiatives
- Ensure impact of work
- Coach and inspire team members
- Coordinate with senior leadership

Director of Portfolio Management	Director of Change Management	Director of Reporting Management	Director of Federal Programs Management
• Monitor all activities and requirements (transformational and otherwise) • Set rules/make recommendations for activity prioritization and sequencing • Prioritize initiatives within portfolio • Manage initiative approval • Analyze portfolio for overlaps/ gaps/synergies	• Implement and manage capability building for project management and change management in PMO and project teams • Design and deliver initiative communications • Coordinate with other departments (PR, HR)	• Track metrics • Track milestones • Monitor linkages • Coordinate program management reporting pack • Prepare overall assessment of risks to program objectives	• Lead planning, implementation, and day-to-day execution of federally funded programs • Identify resource needs, detailed action plans, milestones, decision points and success measures for federally funded programs • Identify and track issues • Monitor/report project status to Executive Director

A process for reporting project status, milestones, and issues to the PMO will be established during the fall of 2009. Figure 17 shows the proposed reporting structure for the Teacher Effectiveness initiatives. For each initiative, managers will be assigned and housed within individual divisions of the central office. Each manager will be directly accountable to their supervisor as well as the PMO for successful planning and implementation of the initiative.

Figure 17: Project Management and Reporting Structure for Teacher Effectiveness Initiatives

Communications

TPS must earn the trust of its stakeholders, both within as well as outside the district. It must be made known that the TPS administration respects their interest in the school system and will engage them in conversations about the current state of TPS and its progress along this path of transformation.

In order to accomplish this goal as it pertains to the Teacher Effectiveness initiatives, TPS has designed a detailed communication plan to inform and connect all stakeholders. On July 31, 2009, meetings will be held for all principals, assistant principals, and ESC staff to inform them about the basics of the proposal and implementation timelines as well as to provide them with a list of Frequently Asked Questions (FAQs) and a DVD about the plan. In addition, all TPS board members will be hand delivered a copy of the final proposal. School leaders who are not able to attend the meeting will have the DVD and the FAQs delivered to them so that they will be prepared to answer questions from their teachers. Concurrently, an automated call will be placed to all teachers and support staff informing them about the proposal and directing them to a secure website for more details that will go live on August 1, 2009. The website will include a section for FAQs, online streaming of the video, and a link for question submission. One office will be responsible for monitoring and answering all incoming questions so that the district's message will be consistent. FAQ's will be updated at least every 48 hours.

On August 1, 2009, TPS will also reach out to local media outlets, directing community members to the public website that will go live on August 2, 2009. The Superintendent will be available for a two-hour press conference on August 2, 2009. On August 3, 2009, he will present an overview of the Teacher Effectiveness initiatives immediately prior to Board of Education meeting which is open to the public. Interested parties will be directed to remain for a video presentation immediately after the Board meeting. The video will be posted to the public website on August 4.

The Superintendent will formally address all teachers at the August 18 convocation and specially trained teams of 2-3 (principals, district administrators, TCTA representatives) will deploy to ten schools per week beginning August 24. These teams will be available to answer the questions and address the concerns of teachers at each school site.

Parents will be specifically informed through Parent/Teacher Association emails, fliers and handouts in school offices, and take-home student newsletters, in addition to information they may gather from the media and the public website.

On a broader scale, TPS will develop and implement a formal communication policy that engages all stakeholders in all matters related to the district.

Financial Management

TPS is responsible for implementing and enforcing a system of internal controls to protect its assets from loss, theft, or misuse and to ensure that reliable accounting data are available for the timely preparation of financial statements in accordance with GAAP. The internal controls structure is designed to provide reasonable, but not absolute, assurance that these objectives are met. The concept of reasonable assurance recognizes that the cost of control should not exceed the benefits likely to be derived and that the valuation of costs and benefits requires estimates and judgments by management. An evaluation of the internal control structure during the 2008 annual audit disclosed no material weaknesses.

TPS has also implemented budgetary controls that act to ensure compliance with legal appropriation limitations and to provide an operating plan for the District's resources. Preliminary budgets are adopted at the commencement of the fiscal year with periodic amendments approved by the Board of Education. Budgetary control is maintained by fund, project, object and site. These appropriated budgets represent the legally adopted fiscal plan of the district. TPS Board of Education approval is required for budgetary transfers totaling $25,000 and greater. TPS utilizes an encumbrance system as a budgetary control mechanism.

Data Systems Baseline

The TPS baseline points to solid technical infrastructure, and basic application and data capabilities. Gaps exist, however, in the usage of data and the effectiveness of the data governance and operations model.

In an effort to improve its data systems, TPS has already started the implementation of PowerSchool (student information system to be rolled-out in 2009-10) and a data warehouse (2010). These new systems will act as the foundation that helps to close part of the data capability gaps and support future initiatives.

Data-informed culture

Data systems and analytics are not consistently leveraged to inform instruction at TPS. Although principals and district users generate and use many school- and student-level reports, most of these queries are not designed to inform instruction. The variability in adoption is driven both by limited visibility into full system capabilities as well as the current systems' limited usability and flexibility.

The roll-out of PowerSchool and a student data warehouse with sophisticated front-end reporting capabilities will make reporting for data-driven decision making more accessible and convenient.

Applications: TPS has the following key applications in place that provide a reliable backbone for basic operations and enable day-to-day operations and reporting: SIS, Human Capital, Finance and Budgeting, Professional Development, Recruiting, and Special Education systems. While they are functional, some should be significantly enhanced or altogether replaced to meet the requirements of the Teacher Effectiveness initiatives. There is no application today for running what-if analysis on student assessment data.

Data capabilities: Two categories of data are required to enable the teacher effectiveness initiatives: "base" for measurement of teacher effectiveness (evaluations and value-add) and "initiative-specific" data.

As to "base" data, TPS has good coverage of student and teacher data, but significant history, quality, accessibility, and data linkage gaps exist. Student schedules are only available for three years and state assessment data are not available in a timely, automated manner.

As to "initiative-specific" data, much of this data has never been tracked. Tracking of new data types and maintenance of more granular data will be needed.

Data operations and governance: Currently, data is owned and maintained by multiple entities. While each data owner oversees and monitors the quality of the data within their own realm, a more unified ownership of data will ensure consistency amongst various data sources. Although data auditing is carried out on an ad-hoc basis by teachers, school clerks or functional users, a more comprehensive and central audit process should be in place.

Technical infrastructure: TPS has excellent network connectivity, good server capacity, and flexible storage architecture. These capabilities are key to supporting the data and application centric initiatives. Security is generally administered in a role based security module; utilizing a secure network logon and/or mainframe logon as the base system access. The primary improvement area includes application architecture that is primarily a point-to-point structure, hindering timely and efficient implementation of new systems.

Data Initiatives

To address the gaps identified above, TPS will implement the following eight IT initiatives:

1. *Complete rollout of PowerSchool*

    TPS is currently migrating from a mainframe-based student Information System (SIS) to the industry leading PowerSchool system. The new system will support the Assess and Set Standards initiative by providing a solid foundation for gathering student/teacher/instruction data, good reporting capabilities, and interfaces to integrate with other K-12 education systems.

2. *Expedite rollout of an academic data warehouse and business intelligence (BI) engine*

    The data warehouse will provide the core data aggregation and analytical capabilities needed to support the initiatives. It will also store and track all students and teacher related data in a single accessible location, enabling data-informed decisions through data analyses, data

mining, and real-time reporting as well as high quality research and evaluation. Last year, TPS successfully rolled out a data warehouse for financial data that is actively used by principals and administrators. The success of this project is predictive of the expected outcomes for the next phase of implementation.

3. Improve infrastructure flexibility

Commercial off the shelf (COTS) middleware and an application server will improve the flexibility of the current technical infrastructure and enable rapid integration and implementation of new systems. It will also reduce the total cost of ownership.

4. Implement enhancements needed for value-added measurement

To support Initiative 1, system enhancements will enable the district to track teacher-student association beyond the current three years for assessment purposes. It will retain granular student data longer, collect detailed teacher data on teaching history and compensation, record student and teacher linkages for specialized elementary teaching, pull out support, record dosage, and make granular assessment data available to users for detailed analysis.

5. Implement five new initiative-specific systems

Performance management system: To support Initiative 1, this system will track effectiveness for individual teachers and leaders. It will automate the collection of principal/coach observations, stakeholder viewpoints, teacher self-evaluations, rubric scores, and development opportunities.

Recruiting system: To support Initiative 2, this system will increase the quality of the incoming teacher population by facilitating a metrics-driven recruiting process and enabling optimized deployment of recruiting resources where they are likely to produce the most value.

Professional development/learning management system (PD/LMS): To support Initiative 2, this system will replace the current PD system. It will catalog and track internal/external opportunities, enable the design of courses based on data analysis, and recommend tracks/courses based on individual needs.

Decision driver system: To support Initiative 4, this system will enable teachers, principals and the district staff to perform what-if and so-what analysis on student and school performance with drill-down and up functionality. It will enable teachers to target assistance, measure progress and inform instruction.

Survey system: TPS will contract with an external vendor to administer periodic anonymous stakeholder surveys to collect feedback on the school and central office environment.

*6. Implement two initiative-specific enhancements to current system*s

Knowledge management system: To support Initiative 2, this system will contain two components: a collaboration platform and a content/document management system. The collaboration platform will support cooperation among principals, Professional Learning Team Leaders, and teachers by creating online communities that include video streaming and real-time

collaboration. A content/document management system will enable the collection, storage, and organization of all documents types and multi-media presentations used for instruction or management. This system could potentially be developed using an existing or new platform.

School portal: To support all initiatives, this portal will allow users to access multiple systems as one unified platform but with different "flavors" for different user roles. It will provide an integrated and customized dashboard and reports that combine and analyze various sources of data.

7. *Establish clear data ownership and governance*

TPS will establish an Information Governance Group with ongoing responsibility to oversee all aspects of data quality and integrity. This data ownership structure will align incentives around data management and access, expand the current audit process, establish a dedicated group for on-going proactive data auditing, and implement data validation checks.

8. *Develop data systems training curriculum and taskforce*

Three training models will help achieve the full implementation of these data initiatives: "train-the-trainer", vendor-led training, and computer-based training. TPS will combine all three approaches. Specifically, TPS will utilize a two phased "train-the-trainer" model where the full training will occur 2-4 weeks after an initial introductory training. Vendor-led training will be used for IT administrators, power users, or cases where the total number of users allows for a single session. Computer-based training will be used for refresher courses as well as initial training on more intuitive systems.

TPS is in a position to serve as model to other districts for replication of its data system design and implementation since its basic data systems infrastructure is typical of other districts. Further, TPS has demonstrated the ability to implement a number of complex IT initiatives in a low cost manner.

Coordination with External Researchers and Evaluators

Coordination with external evaluators and researchers is reflected throughout the administration of every grant awarded to the district from conception to outcomes. Internal and external evaluators work in coordination to ensure the day-to-day evaluation activities generate information and data used to measure the effectiveness of all grant programs. The district maintains an active Internal Review Board who will provide guidance and approval for all evaluation methods. The Executive Director of the Program Management Office will be an asset in assuming the responsibilities as the internal evaluator. She has expertise and extensive experience in a variety of evaluation/assessment models and has served in various educational roles during her career in teaching and administration.

TPS Board of Education, Teachers Association, and Community Engagement

Continued and significant engagement with these three sets of stakeholders, who are vital to the success of this work, will include the following strategies that are mentioned throughout the proposal: four leadership retreats with members of the Board, district administrators and

Teachers Association Board members; representation by all three groups on the Steering Committee; and significant involvement in the design and implementation of all aspects of the initiatives.

External Partners

TPS has longstanding relationships with each of the community partners listed in Figure 19. Each was selected based on their commitment to driving student achievement both locally and on a state-wide basis. Further, each was selected based on the critical nature of their participation for the success of these initiatives. A representative from each partner was seated on the Teacher Effectiveness Steering Committee with the exception of the Oklahoma legislators and university partners.

Figure 19: Community Partners

Community Partners	Roles and Responsibilities
Tulsa Classroom Teachers Association • President • Vice President • OEA representative	• Communicate with members and champion the changes contained in the proposal • Propose and encourage members to support • Changes to compensation package necessary to implement Gates teacher effectiveness proposal • Changes to teacher transfer policy necessary to implement Gates teacher effectiveness proposal • Scheduling restrictions that require equal length school days to allow a pilot project in rescheduling to facilitate Professional Leadership Teams • Advocate for changes in legislation
Oklahoma legislators • Senate President Pro Tempore • House Speaker	• Propose and work toward passage of legislation • § 17-116.2 to make teacher retirement payments based on total compensation inclusive of bonuses rather than base pay alone • § 13-110 to allocate state 5% additional payments to special education teachers on total compensation inclusive of bonuses rather than base pay alone • § 1210.565 to allocate state 5% additional payments to alternative education teachers on total compensation inclusive of bonuses rather than base pay alone • § 6-101.24 to extend the maximum time for a plan of improvement for a teacher identified as deficient from two months to one year • TBD to allocate state gaming revenues for teacher performance pay • § 1210.508 to require the state department of education to return testing results to the districts by May 31 of the testing year
University partner • Tulsa Community College	• Create and sustain teacher preparation programs that train teachers explicitly for urban education, differing from their general programs by using an urban-specific curriculum and requiring internships in urban schools that include more practice instruction time than traditional student teaching experiences • Secure funding for these programs outside the Gates teacher effectiveness grant • Professional development geared to urban populations.
TPS Board of Education	• Pass all necessary local regulatory changes necessary to implement Gates teacher effectiveness proposal • Provide focused, consistent decision-making • Build community and legislative support • Continue unwavering advocacy for teacher effectiveness reforms
Oklahoma Department of Education State Superintendent of	• Use TPS as a model district and have TPS employees speak at ODE sponsored sessions on teacher effectiveness and reform • Provide past three years of state testing data to TPS value added vendor in December 2009 to create an external baseline of teacher effectiveness

Public Instruction	• Support legislation to amend § 1210.508, requiring the state department of education to return testing results to the districts by May 31 of the testing year
Local funders	• Collectively commit to providing $3M a year in matching funds for strategies outlined in the proposal in years 2009-10 through 2013-14 • Commit to ensure long-term funding stability of teacher effectiveness strategies beyond year 2013-14
NAACP	• Assist in closing achievement gap along racial/ethnic lines • Advocate strategies to the broader community
Tulsa Urban League	• Assist in closing achievement gap along racial/ethnic lines • Advocate strategies to the broader community

Figure 20 lists the external vendors with which TPS plans to contract. Where they have been identified, they were selected based on their expertise in providing the services required. Vendors who have not been identified will be selected based on their ability to provide the required services and in accordance with competitive bidding and state procurement guidelines.

Figure 20: Contracted Vendors

Contracted Vendors	*Roles and Responsibilities*
Elizabeth Arons	• Build following capabilities into TPS • A strategic partner to sites and schools, vs. a transactional/administrative support function • An HR function that tracks and uses data to make decisions on recruiting, hiring, placement, and exit of teachers and school leaders • A department that can effectively support district initiatives for improvement • An office that engenders confidence from those it serves • An organization that is measured on its performance and is held accountable to explicit expectations of that performance
McKinsey and Co.	• Assist TPS in establishing PMO • Assist TPS in building performance culture • Drive internal cost reductions
Value-added vendor	• Provide value added measures for all TPS teachers and schools in four core subjects in grades three through eleven • Provide student risk factor calculations for all TPS students in four core subjects in grades three through eleven • Provide data for research or directly conduct research for program and personnel evaluation purposes including, but not limited to,
IT Consultant	• Provide expertise in implementation of new hardware and software • Provide data auditing services • Develop applications
Testing vendor	• Create new end-of-year assessments to fill in gaps in four core subjects in grades 2-11 by March 2010 • Provide state or national norm references for each of these groups • To the degree possible, vertically scale assessments in subsequent years
TNTP Model Staffing Initiative	• Streamline hiring timelines and practices • Train principals on interviewing and selecting effective teachers • Develop feedback systems and focus groups to evaluate and refine hiring processes • Provide as-needed assistance for most challenged schools

Capturing Lessons Learned and Evaluation

In addition to the evaluation process provided by the Gates Foundation, TPS will also conduct an evaluation of their specific district strategies. The purpose of the TPS evaluation plan is multi-

faceted. First, it will determine if project outcomes and performance measures have been achieved. Second, it will monitor project implementation. Third, it will enhance project improvement, document information about process development for all strategies. Finally, it will collect solid evidence from the project's impact on student achievement. The *Context, Input, Process, Product (CIPP)* model (*Stufflebeam*, 2002), an ongoing cyclical process of evaluation, will guide the evaluation strategies and ensure sustainable outcomes. The CIPP model ensures the use of an integrated, multi-faced evaluation and allows a continual refinement of services based on outcomes, stakeholder feedback, and the needs of the population served.

The evaluation plan is further based on the goal of achieving a quality annual assessment ensuring that program goals and objectives are effectively met. Data will be collected monthly, quarterly, and annually. The plan employs both formative and summative methods to accomplish these tasks. Formative evaluation methods will be used in assessing needs and evaluating program services, allowing for examination of project implementation and improvement in needed areas. Information formative evaluation will be conducted through the use of open-ended discussions to seek solutions to ongoing needs and improve program plans. Summative evaluation methods will examine and report the degree to which all of the goals and objectives have been met through analysis and application of the following data:

- Quantitative data gathered from the student testing, teacher assessments, results of parent, staff and stakeholder surveys (quantified through use of a Likert-like scale), pre/post measures of behavior incidents, attendance records, and others as needed.
- Qualitative data indicating the degree of progress achieved collected from principal, teacher, parent, Steering Committee member and other reviewer comments when asked if they found students to have better classroom performance and decreased problem behavior.
- Annual surveys of participating students, parents, teachers, and principals asking questions regarding and ratings of the various program elements.

Evaluation data gathering activities will include on-site visits to observe classes and interview principals, teachers, and students. Evaluation results will be reported on a regular basis to the Program Management Office, Superintendent, Steering Committee, TPS Board of Education, and the Bill and Melinda Gates Foundation.

Additionally, an on-going, community-wide evaluation process extended across the central office, schools, partners, and community will be critical to the achievement of the project's goals and objectives. TPS will contract with an external evaluator to ensure this critical component is effectively conducted. The district will pursue this evaluator through a formal bid process, ensuring that EDGAR and state procurement policies are followed. The minimum requirements for the external evaluator will include at least five years of experience in conducting grant evaluations, and a minimum of a Master's Degree in Education or related field. The purpose of this external evaluation is multi-fold: timely information for strategic planning, opportunity for performance feedback, allowing for programmatic adjustments, and periodic measurement of progress toward achieving intended outcomes. TPS will leverage the external evaluator to assist in any and all research needs of the Bill and Melinda Gates Foundation.

Project Budget

Costs Associated with Implementation

The total 5-year transformation costs will be $88 million, with significant cost components stemming from following areas: increases required by the new performance incentive system ($54 million), overtime and stipends paid for in-house development of most of the programs and tools required to support the Teacher Effectiveness initiatives ($4 million), external consulting and vendor fees ($17 million), and significant upgrades to the data systems ($9 million).

In projecting the costs of the performance incentive system, it was determined that the standards for receiving incentives would be set such that in year two 40% of teachers will receive an incentive, 4% of whom will receive the highest incentive. A logical assumption was made that teacher effectiveness would grow by 25% over the following years so that by the fifth year (2012-2014), 50% of teachers will be eligible for incentives and 5% will receive the highest incentive. This was applied uniformly to the current distribution of teachers by salary step and lane (e.g., if there are 25 teachers with Bachelor's degrees and 5 years of experience, then in the year two 10 (40%) will receive incentives and one (4%) will receive the highest incentive). These assumptions were used to create an estimate of the expected compensation (i.e., salary plus incentives) for each teacher, compared to the teacher's current salary. Expected compensation estimates were also based on data suggesting that 25% of teachers will be eligible for individual student-growth incentives in the first year and will increase to 53% in year three and beyond. It has been assumed that teachers who will receive higher compensation under the new program will opt-in, less those teachers who will not opt-in regardless of opportunity to make more money. It has also been assumed that 50% of teachers with 31 years of experience or more, 25% of teachers with 21 to 30 years of experience, 15% with 11 to 20 years of experience, 10% with 6 to 10 years of experience, and 0% with 5 or fewer years of experience will not opt-in. These assumptions have led TPS to predict that the opt-in rate will be 74% in the first year of the program.

Based on these assumptions, the expected cost of implementing the performance incentive system was calculated by summing the salary and incentives each teacher will be expected to receive plus benefits computed for the total compensation (salary plus incentives): 7.65% FICA, 9.5% retirement, 3% other (worker's compensation, unemployment, etc). The difference between total expected cost and the 2008-2009 actual cost was calculated to determine the net cost of the program in year one. Net costs beyond year two were calculated in the same manner by increasing the experience level of teachers and predicting turnover rates. In year three, it is assumed that turnover rates will remain constant with 2007-2008 calculations, but will increase by 8% in years four and five resulting from the exiting of ineffective teachers.

The yearly net costs associated with implementing the performance incentive system are as follows: year one ($220,000, mostly personnel management costs), year two ($13.4 million), year three, ($15.3 million), year four ($13.4 million), year five ($12.1 million). TPS along with local funders will assume the cost of sustaining the new compensation structure after year five.

The overtime and stipend estimates assume the following rates: teacher participation in workshops or training (18/hr plus 17% benefits), teacher assistance in development of training and tools ($23/hr plus 17% benefits), principals ($50/hr ($100,000 annual salary/2,000 work hours per year) plus 22% benefits), professional development (PD) specialists ($37/hr plus 17% benefits).

In order to develop the programs and tools necessary for the initiatives, teachers, principals and specialists will need to be compensated for the following time: 32 hours for each hour of training developed ($32,000), 160 hours each from ten PD specialists ($58,000/yr, equals one month added to their existing contract) and 80 hours each from 20 teachers ($43,000/yr) for content collection in the knowledge management system, 30 hours annually for 30 relational recruiters at $100/hr plus 17% benefits ($107,000/yr). 1.0 FTE at $70,000 will be added to support the development of additional content for PD. 0.5 FTE at $100,000 will be added to manage the new assessment process. All new positions have a built-in 3% raise per year to compensate for cost of living increases.

The yearly costs associated with overtime and stipends are as follows: year one ($800,000), year two ($700,000), year three ($1.8 million), year four ($620,000), year five ($620,000). TPS along with local funders will assume the cost of sustaining any overtime and stipends incurred after year five.

In order to effectively administer these initiatives, TPS will need to create the following new management positions: Executive Director of the Program Management Office ($99,750/yr plus benefits), Director of Portfolio Management ($75,000/yr plus benefits), Director of Change Management ($75,000/yr plus benefits), administrative assistant ($35,000/yr plus benefits), and a budget analyst ($40,000/yr plus benefits). Each position will also receive an annual 3% cost of living increase. Additional costs include office start up ($33,200), travel costs ($25,000), contractual costs for an external evaluator, school board training costs, and performance culture curriculum purchases ($75,000), and McKinsey organizational support ($2 million).

The yearly costs associated with the Program Management Office are as follows: year one ($2,717,000), year two ($697,000), year three, ($715,000), year four ($733,000), year five ($753,000). TPS along with local funders will assume the cost of sustaining any overtime and stipends incurred after year five.

The cost estimates of each external consulting relationship are based on either past experience with the vendor or recent discussions with vendors to get preliminary cost quotes. The yearly cost estimates are as follows: Gallup TeacherInsight and PrincipalInsight tool ($50,000), The New Teacher Project Model Staffing Initiative recruiting support ($342,000), additional *Teach For America* teachers ($600,000), development of value-added measures ($370,000, based on vendor quotes), development of new tests ($5 million, based on a preliminary vendor estimates), and ongoing maintenance fees for testing ($500,000, based on the current per-test-per-year cost paid to one of the District's current test vendors).

The yearly costs associated with external consulting and vendor relationships are as follows: year one ($9.6 million), year two ($1.8 million), year three, ($1.4 million), year four ($2.3

million), year five ($1.9 million). TPS along with local funders will assume the cost of sustaining any external consultant or vendor contracts incurred after year five.

These cost estimates for data system upgrades and enhancements are based on quotes from leading IT vendors, K-12 education discounts, and team analysis of implementation and operating costs. The cost estimates are as follows: hardware requirements ($1 million), licensing and management for new software and tools ($2.8 million), additional staff ($2.4 million, for 5-6 FTEs: Project Manager, Subject Matter Expert, two data auditors, data validation engineer, and up to two application developers), and consultants ($2.1 -$3.5 million).

The yearly costs associated with data system upgrades and enhancements are as follows: year one ($3.75 million), year two ($1.9 million), year three, ($1.2 million), year four ($1.4 million), year five ($1 million). TPS along with local funders will assume the cost of sustaining any data system upgrades and enhancements incurred after year five.

Factors That Could Significantly Affect Cost Estimates

While the assumptions for overtime costs could change based on actual time required to complete the work and vendor estimates could be modified during the RFP process, these issues will likely not significantly affect the costs. Estimates of time were purposefully high and due diligence was used to get accurate vendor cost quotes. The new compensation structure contains many assumptions that could significantly affect the costs. TPS has will set the bar for the top 40% of teachers to receive incentives in the first year of implementation, but if growth in teacher effectiveness is faster than expected, the costs could go up. Similarly, if turnover or risk aversion is lower, resulting in a higher opt-in rate, costs could increase significantly. The assumptions in the compensation model, however, are based on current TPS data or have been vetted with financial projection experts within the District as well as the Teachers Association. Additionally, a joint TPS/Teachers Association team will recalibrate the bar for performance incentives each year to match payouts to the available bonus pool, to ensure that the cost of incentives will never reach a point beyond what is sustainable. Finally, teachers could strike to get a higher hourly wage. The risk potential for a strike is very low for two reasons. First, these initiatives were developed in collaboration with the Teachers Association. Second, the Oklahoma Constitution forbids strikes by individual unions, so every union in the state would have to strike together.

Reprioritization and Reallocation of Funding

TPS has already enacted plans to reallocate current sources of funding. Beginning in 2009-2010, school start times will be adjusted to capture $400,000 of savings per year by using school buses for multiple routes. The conversion of 140 buses to Compressed Natural Gas (CNG) will save the district $766,000 per year. Further, TPS will undergo a thorough cost diagnostic conducted by McKinsey and Company in the fall of 2009, wherein the district estimates savings of $6.5 - $17 million will be identified. These savings estimates were based on an analysis of the current district budget and results of past cost savings efforts in other school districts. As savings are identified and accumulated, the funds will be reallocated to support the Teacher Effectiveness transformation. School budgets, particularly those with the greatest percentages of low-income

and minority students, will be under the close supervision of district administrators. As the new standards of teacher, leader, and school effectiveness are integrated into TPS expectations, the leaders that meet or exceed the standards will be awarded more autonomy over their school budgets while district administrators will have the discretion to intervene in the budget allocations of a leader who has failed to reach those standards. As to the reallocation of funds that support staff salaries and professional development, each will be repurposed to support their new structures under the Teacher Effectiveness initiatives. Principal and assistant salaries are being entirely repurposed to enable the leader performance incentive system. The salaries of teachers who opt into the new teacher compensation system will be repurposed to enable it and the 5% pay cuts for the 13 top-level administrators will be repurposed to support the development of a performance culture. Finally, existing positions and salaries both at the district and school levels are being consolidated and repurposed to support the new professional development initiatives.

Funding Incremental Costs

The funding estimates have assumed that TPS will capture the most conservative estimate of identified savings ($6.5 million) for use in funding the Teacher Effectiveness initiatives, but the goal is to capture significantly more savings, further reducing (or eliminating) the need for external funding by year 10. TPS has also received tremendous support from local funders in the form of pledges of initial funding as well as commitments to ensure sustainability. Currently, 11 local foundations have pledged $3 million dollars per year to support the initial five years of implementation.

In addition to funder support, local partners are helping fund the implementation of specific initiatives. Oklahoma State University (OSU), Northeastern State University (NSU) and Tulsa Community College (TCC) will support the Urban Institutes through university funds, federal grants, and matching funds from the Cherokee and Osage Nations. The University of Oklahoma (OU), TCC, and the George Kaiser Family Foundation will fully support the degree program for paraprofessionals to become teachers through the Early Childhood Education Loan Forgiveness Program. The George Kaiser Family Foundation has also committed to funding the next three years of *Teach for America*. The costs and funding sources for each of these initiatives have not been included in the attached budget template as they are already fully funded by external sources.

TPS is requesting $55,597,141 from the Bill and Melinda Gates Foundation (BMGF) to fund a large portion of the Teacher Effectiveness transformation over the next five years. The amounts requested for the individual components of each initiative, as listed in the attached budget template, were allocated based on the expected percentage of each year's cost that will be covered by the BMGF grant. Additional sources of potential funding include $6.5 million per year in TPS savings, ARRA stimulus funding opportunities ($4.5 million Teacher Incentive Grant, $650,000 Innovation Fund Grant, $150,000 Education and Human Resources Grant), and TPS' current Title II carry-over of $700,000.

Over the next five years, several new funding sources will come on line which will help TPS transition to an internally sustainable funding model. TPS has estimated that it will potentially

identify savings of up to $17 million. Further, with the creation of a culture of performance focusing on supporting student success within every department in the district, it will drive the motivation for TPS to be vigilant in identifying savings and repurposing opportunities at every turn.

Obviously, relying on these sources of funding does not come without risks. The savings identified could be lower than expected, but TPS has recently demonstrated success in identifying savings opportunities and there is evidence based on national benchmarks and McKinsey's experience with other school districts that there are significant savings opportunities available. Further, the lower end of the estimate of savings was developed using very conservative assumptions. TPS could be unsuccessful in being awarded federal, state and foundation grants, but the TPS grant-writing team has a proven track record resulting in over $75 million in successful grant funds to date. In addition, TPS will apply for grants from multiple sources, greatly reducing the District's risk. TPS has already received letters of commitment from state legislators regarding these initiatives and could use its strong support from local foundations to lobby the legislature and Governor to leverage public revenues to support Teacher Effectiveness work in the long run. Local foundations have signed letters of commitment to fund significant portions of the initiatives over the next five years and to ensure sustainability after that, but if the economy continues to worsen significantly, that funding is not guaranteed. The coalition of local foundations is led by two well-funded foundations with significant asset bases, however, and should be able to contribute some funding even in the worst of times.

Fiscal Agent

In managing grant funds from the Bill and Melinda Gates Foundation, TPS will contract with the Tulsa Community Foundation to act as the fiscal agent and grant administrator. The Tulsa Community Foundation (TCF) is a tax-exempt, public charity organized in 1998 to receive, administer, and distribute gifts from individuals and organizations for the improvement of Tulsa and the eastern Oklahoma area. TCF is the largest community foundation in the nation. Currently, TCF manages over $3.6 billion invested through 395 donor-advised of donor-designated funds, 242 charitable agency reserve funds, 32 scholarship funds, and 12 supporting agencies.

TCF is governed by a 26 member Board of Trustees selected based on their demonstrated personal involvement in civic affairs and their high level of commitment and philanthropic leadership to the Tulsa community. The TCF Board of Trustees is responsible to the community for the overall management and growth of the Foundation, including its fiscal and investment policies, as well as the grants made from its funds.

TCF has the capability of operating under a "dual" fiduciary responsibility system where TCF joins with the donor organization in oversight activities. The donor organization oversees the finances of the organization as a whole, including its permanent and/or safety net fund. It maintains fiduciary responsibility for the funds it transfers to TCF and maintains such in monitoring the investments and making recommendations to TCF concerning distributions, asset allocation, etc. TCF oversees the investment management, accounting, and financial reporting,

and an annual certified audit for each permanent and/or safety net fund. The TCF Board of Trustees and the donor organization then jointly monitor the permanent and/or safety net.

Challenges and Risks:

In assessing the challenges and risks that are faced by a successful implementation of these initiatives, TPS conducted an initial risk taxonomy to pinpoint potential challenges and how to address them proactively.

Implementation: The most critical factor to a successful implementation is open and continuous communication with the stakeholders. If the lines of communication are inconsistent or insufficient, stakeholders including principals, teachers, parents, and community partners will fail to realize the necessity of their engagement and participation. TPS will establish a thorough system of two-way communication (described above) to mitigate this risk. The voice of every partner and stakeholder will be honored by TPS.

Organizational Change: Given the duration of this transformation, one risk is change fatigue. Inevitably, individuals and organizations want to settle into a status quo. In the fall of 2009, all administrative leaders will undergo training in being a leader of change, and in so doing, gain the skills required to identify the signs of oncoming fatigue. Throughout the process, TPS will deliberately act to address this fatigue before its onset through open dialogue, thereby mitigating the risk of stakeholders turning back from their pursuit of their goals. Additionally, to encourage the district to press on, each month, the Superintendent's Bulletin will feature an employee who demonstrates significant successes as a result of this transformation. When the district does suffer a setback, the administrative leadership will address such issues openly, seeking input from the front-line employees as to the best strategy to move forward.

Political and Reputational: TPS is fortunate to have a collection of extraordinarily active and collaborative community partners. These partners share a common vision for the future of the district and will be active participants in the transformation. TPS is also fortunate to have longstanding relationships with political partners in the local and state community. With any collection of individuals, however, the potential exists for divergence as implementation continues. In order to combat such a divergence, TPS will work to sustain a common purpose and vision. The Steering Committee and the broader philanthropic community have made public pronouncements that, with or without, Gates' funding, all will continue their efforts to support the implementation of the Teacher Effectiveness project. The Steering Committee will continue to meet on a quarterly basis, not only to assess progress, but also to provide a forum for discussion of emerging differences among committee members, including community stakeholders.

Technology: There are multiple risks and challenges facing the implementation of the new and enhanced data systems. In order to mitigate the risks of time and cost overruns as well as low system quality, TPS will institute an IT Project Management Office (PMO). The IT PMO will work with Information System Services to manage project scope and schedule and to provide assistance with RFP issuance, vendor selection, system definition, and deployment. To mitigate the risk of incomplete or incorrect definition of business and technical requirements, TPS will

engage external IT consulting resources to collaborate in the development of detailed system specifications. Data quality and integrity, especially during the migration process, will be addressed through a dedication of resources to data audits, overall data quality checks, and IT quality assurance resources. Finally, to ensure optimal adoption, TPS will make significant investments in tailored training programs and will take a phased approach to rolling out systems so users are able to absorb new functionality. Deployment will be supplemented with timely IT support for end-user issues.

Personnel: TPS currently lacks a formalized whistleblower policy. In order to ensure full personnel support of the Teacher Effectiveness initiatives and organizational changes, every employee must be guaranteed the assurance of protection from retribution if they report wrongdoings by their colleagues or superiors, whether they relate to these initiatives or not. TPS will work with the Board of Education, Tulsa Classroom Teachers Association, and its legal advisors to craft and enact a thorough whistleblower policy that complies with both federal and state law.

Sustainability:

TPS is confident in its plans for long-term sustainability. All major stakeholders have made public pronouncements in support of the vision and specifics of the Teacher Effectiveness initiatives. Additionally, TPS has developed a plan to drive each of the three following components on sustainability.

Policies

TPS is fortunate that there is limited negotiated language that impedes the initiatives designed to drive teacher effectiveness. The most significant language that must be approved by a vote of the teachers association members relates to the new compensation structure that rewards effectiveness as measured by student-growth scores and performance rubrics rather than rewarding years of experience and degrees obtained. Additional language that will require negotiation pertains to the repurposing of contracted out-of-class minutes to accommodate and support the implementation of the Professional Learning Teams at each school.

Practices

Each of the initiatives detailed above require many changes in practice, but the most critical to the success of this plan is the transformation of TPS into a data-driven performance culture. The Board of Education will drive the plan to shift the mindsets of the Superintendent, Tulsa Classroom Teachers Association, administrative officers and staff, principals, teachers, and school staff to focus their every day job performance so that it drives and enables student performance. Every employee and partner of TPS will be held to a higher standard of performance.

Finance

Financial sustainability is the key to the success of these initiatives designed to propel student achievement and college-readiness to levels never before seen in Tulsa. Transformations that last five years are not truly transformative, they are fads. TPS is determined that these initiatives will not fade away based on financial reasons or otherwise. TPS plans to generate significant internal savings through renegotiating supplier contracts, rerouting transportation, streamlining the central office, improving energy efficiency, and consolidating subscale schools. These efforts will free up at least $6 million in annual funding by the 2012-2013 school year.

Finally, the city of Tulsa has an extremely active philanthropic community. This community has agreed in principal to provide for the financial sustainability of this work beyond 2013.

Conclusion

The Teacher Effectiveness initiatives will provide an opportunity for TPS to transform their policies and practices – and in the process, create the foundation for a revolutionary increase in academic achievement for TPS students. Tulsa recognizes that there is no time to lose and is ready for the challenge.

APPENDIX A: STUDENT IMPACT, OUTCOMES AND EXECUTED MILESTONES

STUDENT IMPACT and OUTCOMES	Current Status / Baseline – 2007-08	Anticipated Progress or Completion Year 2 by data and/or task	Anticipated Progress or Completion Year 3 by data and/or task	Anticipated Progress or Completion Year 4 by data and/or task	Anticipated Progress or Completion Year 5 by data and/or task
Student levels of college readiness raised to 32%	7% graduating college-ready	10% graduating college-ready	15% graduating college-ready	23% graduating college-ready	32% graduating college-ready
Achievement gap reduced by half by by racial / ethnic college readiness	13 point achievement gap by racial / ethnic college readiness	12 point achievement gap by racial / ethnic college readiness	10 point achievement gap by racial / ethnic college readiness	8 point achievement gap by racial / ethnic college readiness	6 point achievement gap by racial / ethnic college readiness
Achievement gap reduced by half by socio-economic college readiness	12 point achievement gap by socio-economic college readiness	12 point achievement gap by racial / ethnic college readiness	10 point achievement gap by racial / ethnic college readiness	8 point achievement gap by racial / ethnic college readiness	6 point achievement gap by socio-economic college readiness
Percentage of all students across all grade levels scoring satisfactory or above on core Oklahoma State assessments raised to 90%	Percentage shortfall from goal ranges from 3% to 54% across all subjects and grades	Percentage shortfall from 90% goal reduced by 25%	Percentage shortfall from 90% goal reduced by 50%	Percentage shortfall from 90% goal reduced by 50%	90% of students scoring satisfactory or above
Graduation Rate increased to 85%	70% graduation rate	73% graduation rate	77% graduation rate	81% graduation rate	85% graduation rate
College Going Rate increased to 64%	42% college going rate	45% college going rate	51 % college going rate	57 % college going rate	64% college going rate

EXECUTION MILESTONES	Current Status / Baseline – 2007-08	Anticipated Progress or Completion Year 2 by data and/or task	Anticipated Progress or Completion Year 3 by data and/or task	Anticipated Progress or Completion Year 4 by data and/or task	Anticipated Progress or Completion Year 5 by data and/or task	Anticipated Outcomes Year 5
Initiative 1: Assess and Set Standards	TPS currently lacks quantifiable and objective assessments for identifying teacher effectiveness	Three years of value-added data available for Math and English Language Arts teachers	Two years of value-added data available for all core subject teachers in grades 3-11	Three years of value-added data available for all core subject teachers in grades 3-11	Continuing three years of value-added data available for all core subject teachers in grades 3-11	95% of TPS teachers will achieve an effectiveness score on the performance rubric and value-added (as applicable) assessments this is at or above the district standard each year.
		Teacher and Leader Performance Rubrics will be designed	Teacher and Leader Performance Rubrics will be reviewed and updated, if needed	Teacher and Leader Performance Rubrics will be reviewed and updated, if needed	Teacher and Leader Performance Rubrics will be reviewed and updated, if needed	
		TPS and TCTA will set Performance Standards	TPS and TCTA will review and update, if needed, Performance Standards	TPS and TCTA will review and update, if needed, Performance Standards	TPS and TCTA will review and update, if needed, Performance Standards	
Initiative 2: Deploy and Motivate	There is no data with which to analyze the current distribution of effective teachers in the district and within the schools beyond a recent sampling analysis by Mathematica, Inc. of TPS 5th grade math teachers	Roll-out new compensation system, all teachers eligible to opt in	Evaluation/needed adjustments of compensation system regarding impact and effectiveness, with annual opt in	Evaluation/needed adjustments of compensation system regarding impact and effectiveness, with annual opt in	Evaluation/needed adjustments of compensation system regarding impact and effectiveness, with annual opt in	50% of teachers and leaders will receive performance pay incentives each year based on individual and school-based student growth scores and individual performance rubric assessment scores.
	TPS estimates that only 50% of secondary advanced course teachers also taught a core content course	Exit ineffective teachers and leaders based on combination of performance rubric and value-added scores in accordance with due process	Continue exiting ineffective teachers and leaders based on combination of performance rubric and value-added scores in accordance with due process	Continue exiting ineffective teachers and leaders based on combination of performance rubric and value-added scores in accordance with due process	Continue exiting ineffective teachers and leaders based on combination of performance rubric and value-added scores in accordance with due process	
		Deploy 3 leadership teams to highly challenged schools	2nd year evaluation of deployed leadership teams; deployment of 2nd triad of leadership teams	2nd and 3rd year evaluations of deployed leadership teams (2); deployment of 3rd triad of leadership teams	2nd and 3rd year evaluations of deployed leadership teams (3); continuing deployment of leadership teams	
Initiative 3: Develop	Development curriculum is not tied to assessment outputs	85% of secondary advanced course teachers will also teach two or more sections of core content courses	90% of secondary advanced course teachers will also teach two or more sections of core content courses	95% of secondary advanced course teachers will also teach two or more sections of core content courses	100% of secondary advanced course teachers will also teach two or more sections of core content courses	All highly challenged schools within the district will be 100% staffed with effective teachers and leaders as measured by value-added and performance rubric assessment scores.
	Principals spend 55% of their time on building management/discipline and only 29% on instructional leadership	Pilot Professional Learning Teams in 9 schools to focus on data-driven instruction	Roll-out Professional Learning Teams to all schools	Professional Learning Teams in operation and refining functioning at all schools	Professional Learning Teams in operation and refining functioning at all schools	
		Pilot School Administrative Managers in 15 schools to enable principals to be instructional leaders	Expansion of School Administrative Managers into 1/3 of the schools to enable principals to be instructional leaders	Expansion of School Administrative Managers into 2/3 of the schools to enable principals to be instructional leaders	Expansion of School Administrative Managers into all of the schools to enable principals to be instructional leaders	
Initiative 4: Attract	Only 22% of early offers accept jobs at TPS and are still teaching after two years	Pilot *Teach for Tulsa Day* for 100 new teacher candidates	Host 3 *Teach for Tulsa Days* for 100 new teacher candidates each	Host 3 *Teach for Tulsa Days* for 100 new teacher candidates each	Host 3 *Teach for Tulsa Days* for 100 new teacher candidates each	
		Hire, train, and deploy team of 30 part-time relational recruiters	Continued utilization of 30-part time relational recruiters	Continued utilization of 30-part time relational recruiters	Continued utilization of 30-part time relational recruiters	

ANTICIPATED EXTERNAL FACTORS or CHALLENGES	Courses of Action to Address Challenges
Implementation: Lack of open and continuous communication with the stakeholders.	TPS will establish a thorough system of two-way communication to mitigate this risk. Stakeholders will be represented on the Steering Committee and Core Team, both of whom will meet no less than bi-weekly. Information will be available on the public website. The voice of every partner and stakeholder will be honored by TPS.
Organizational Change: Given the duration of this transformation, inevitably, individuals and organizations want to settle into a status quo.	Throughout the process, TPS will deliberately act to address this fatigue before its onset through open dialogue. Each month, the Superintendent's Bulletin will feature an employee who demonstrates significant successes as a result of this transformation. When the district does suffer a setback, the administrative leadership will address such issues openly, seeking input from the front-line employees as to the best strategy to move forward.
Political and Reputational: With any collection of individuals, the potential exists for divergence as implementation continues.	In order to combat such a divergence, TPS will work to sustain a common purpose and vision. The Steering Committee will continue to meet no less than bi-weekly to assess progress and provide a forum for discussion of emerging differences among committee members, including community stakeholders.
Technology: Incomplete or incorrect definition of business and technical requirements as well as incomplete adoption by users.	TPS will engage external IT consulting resources to collaborate in the development of detailed system specifications data quality and integrity, especially during the migration process. To ensure optimal adoption, TPS will make significant investments in tailored training programs and take a phased approach to rolling out systems so users are able to effectively absorb new functionality.
Personnel: TPS currently lacks a formalized whistleblower policy.	TPS will work with the Board of Education, Tulsa Classroom Teachers Association, and its legal advisors to craft and enact a thorough whistleblower policy that complies with both federal and state law.

BOARD OF EDUCATION – STATEMENT OF SUPPORT

The Members of the Board of Education for Tulsa Public Schools, Independent School District Number One of Oklahoma, hereby join and express our support for the "Teacher Effectiveness" proposal as submitted for consideration to the Bill & Melinda Gates Foundation.

It is the mission of Tulsa Public Schools to "provide quality learning experiences for every student, every day, without exception." We know that quality learning experiences require an effective teacher in every classroom. This proposal provides a concrete plan for completing that critical component in pursuit of our mission.

While this statement of support for the "Teacher Effectiveness" proposal is important, it is also important that we express our commitment to the successful implementation of this initiative. This will include, where necessary and appropriate:

- policy changes;
- focused, consistent and courageous decision-making;
- building community and legislative support; and,
- continuing, outspoken, and unwavering advocacy for these reforms and for continuous improvement in our schools.

We offer our thanks to the Bill & Melinda Gates Foundation for its generous commitment to high quality education. We are grateful for the opportunity to submit and support this proposal.

Dr. Lana Turner-Addison, President

Matthew Livingood, Vice President

Ruth Ann Fate, Member

Bobbie Gray, Member

Gary Percefull, Member

Oma Jean Copeland, Member

Brian Hunt, Member

NAACP TULSA BRANCH

National Association For The Advancement of Colored People, P.O. Box 6246, Tulsa, Oklahoma 74148 • (918) 592-7989 • naacp@execs.com

July 31, 2009

Dr. Keith Ballard, Superintendent
Tulsa Public Schools
3027 South New Haven
Tulsa, OK 74147

Dear Dr. Ballard:

The National Association for the Advancement Colored People (NAACP) has a commitment to the children of Tulsa and thereby applauds and supports your transformational change of Tulsa Public Schools through your efforts regarding teacher effectiveness. It is our commitment to this project that we will advocate for strategies outlined in your Gates proposal to the broader community to ensure student achievement for ALL students in the district. As an organization dedicated to minority children, we will assist in any way possible to support your endeavors to close the racial achievement gap to ensure that ALL students are college ready once they graduate from high school. It is also my pledge to assist you in your efforts by for this worthwhile endeavor.

I look forward to working with you on this exciting initiative in the very near future.

Sincerely,

Pleas A. Thompson
President

TULSA PUBLIC SCHOOLS

BOARD OF EDUCATION
LANA TURNER-ADDISON, President
MATTHEW LIVINGOOD, Vice President
OMA JEAN COPELAND   BOBBIE GRAY   BRIAN HUNT
RUTH ANN FATE   GARY PERCEFULL
PEGGY YOUNG, Clerk

July 28, 2009

Dr. Keith Ballard, Superintendent
Tulsa Public Schools
3027 S. new haven
Tulsa, OK 74147

Dear Dr. Ballard,

I write in unqualified support of the Tulsa Public Schools, Independent School District Number One, "Teacher Effectiveness" proposal that is being submitted to the Bill & Melinda Gates Foundation.

I know the initiatives and strategies outlined in the proposal, when implemented, will ensure that an effective teacher is in every classroom. More specifically, I firmly believe that this reform will equip Tulsa Public Schools to close achievement gaps, especially affecting low income and minority students.

Board Members have committed to me their support for ensuring that appropriate policies and regulations are adopted to support successful implementation of the strategies outlined in the proposal. This "Teacher Effectiveness" proposal fully aligns with Tulsa Public Schools' mission statement "to provide quality learning experiences for every student, every day, without exception," that was adopted by the Board of Education. In addition, the initiative fully addresses one of the Board's stated fundamental beliefs that "quality learning experiences require an effective teacher in every classroom." We now have the roadmap to fully put that belief into practice.

The Board, collectively and individually, will do everything in its power to ensure the success of this reform. We will remain, as we have been, in constructive and cooperative conversation with district leadership, with teachers and staff, with the community we serve, with elected officials who share the responsibility and challenges we face, with business leadership, and with our generous philanthropic partners. In addition, regardless of the outcome of this particular funding request, we will continue to serve as passionate advocates for quality education in Tulsa Public Schools.

I am pleased that Tulsa Public Schools has been given the extraordinary opportunity to engage in this effort, to formulate this proposal, and to pursue this funding. I know that when implemented, Tulsa Public Schools' model for seeking, developing and sustaining teacher excellence will serve as a "best practices" example for districts everywhere. Thank you particularly, Dr. Ballard, for pursuing this opportunity and engaging the District in these discussions.

Sincerely,

Lana Turner-Addison

Lana Turner-Addison, Ed.D.

TCTA

TULSA CLASSROOM TEACHERS ASSOCIATION
Denzel Kesterson, President
Patricia Ferguson, Vice President
Linda Hendrix, OEA Advocate

July 31, 2009

Dr. Keith Ballard, Superintendent
Tulsa Public Schools
3027 S. New Haven
Tulsa, OK 74147

Dear Dr. Ballard:

The Tulsa Classroom Teachers Association leadership is pleased to support your Teacher Effectiveness Initiative. It has been a pleasure to work on this project for the past three months and to be given the opportunity to provide valuable input into the project design. We look forward to our continued partnership as we move forward on this project. TCTA leadership is committed to communicating with members concerning the changes contained in the proposal including the proposed compensation package. In addition, we will serve as advocates for changes in legislation regarding teacher retirement payments, special education and alternative education compensation, and expanding a teacher's plan of improvement from two months to one year.

The following individuals have indicated their willingness, by their signatures, to support and participate in the Tulsa Teacher Effectiveness Initiative.

Denzel Kesterson, TCTA President

Patti Ferguson, TCTA Vice-President

Shawna Mott-Wright, TCTA 2nd Vice-President

Trish Mott, TCTA Secretary

Linda Hendrix, OEA Advocate

July 27, 2009

Dr. Keith Ballard, Superintendent
Tulsa Public Schools
Post Office Box 470208
Tulsa, Oklahoma 74147-0208

Dear Dr. Ballard:

The Oklahoma State Department of Education (OSDE) is pleased to partner with Tulsa Public Schools (TPS) to advance the teacher effectiveness initiatives of the district. We will be proud to share proven strategies and programs that are developed and implemented at TPS with other districts in the state. We appreciate the presentation that you provided with Dr. Cindy Koss, Assistant State Superintendent, Office of Standards and Curriculum, during our annual Leadership Conference on July 15, 2009. We have received positive feedback from participants in the session that the information you provided about TPS's initiatives in teacher effectiveness will be useful to other districts wishing to make improvements in their own systems.

The OSDE will also support TPS as you seek to implement data-based decision making related to teacher effectiveness. Our staff will continue to be available to TPS faculty and staff in applying and interpreting student assessment, school accountability, and teacher quality data.

We look forward to our continued partnership with TPS in ensuring that all Oklahoma students receive the best possible education.

Sincerely,

Sandy Garrett
State Superintendent

kw

Office of the Speaker
Oklahoma House of Representatives
Oklahoma City, OK 73105

July 28, 2009

Dr. Keith Ballard, Superintendent
Tulsa Public Schools
3027 S New Haven
Tulsa, OK 74147

Dear Dr. Ballard:

The Oklahoma Legislature applauds your efforts to improve student academic achievement through the implementation of teacher effectiveness strategies aligned to teacher compensation. As our commitment to this project, we will support and sponsor state legislation that will directly affect your Teacher Effectiveness Initiative which will include:

- § 17-116.2 to make teacher retirement payments based on total compensation inclusive of bonuses rather than base pay alone.
- § 13-110 to allocate state 5% additional payments to special education teachers on total compensation inclusive of bonuses rather than base pay alone.
- § 1210.565 to allocate state 5% additional payments to alternative education teachers on total compensation inclusive of bonuses rather than base pay alone.
- § 6-101.24 to extend the maximum time for a plan of improvement for a teacher identified as deficient from two months to one year.
- § 1210.508 to require the state department of education to return testing results to the districts by May 31 of the testing year.

We look forward to working with you in the future on this exciting initiative.

Sincerely,

Chris Benge
Speaker of the House

July 27, 2009

Dr. Keith Ballard, Superintendent
Tulsa Public Schools
3027 S. New Haven
Tulsa, OK 74147

Dear Dr. Ballard:

The Oklahoma Legislature applauds your efforts to improve student academic achievement through the implementation of teacher effectiveness strategies aligned to teacher compensation. As our commitment to this project, we will support and sponsor state legislation that will directly affect your Teacher Effectiveness Initiative which will include:

- § 17-116.2 to make teacher retirement payments based on total compensation inclusive of bonuses rather than base pay alone.
- § 13-110 to allocate state 5% additional payments to special education teachers on total compensation inclusive of bonuses rather than base pay alone.
- § 1210.565 to allocate state 5% additional payments to alternative education teachers on total compensation inclusive of bonuses rather than base pay alone.
- § 6-101.24 to extend the maximum time for a plan of improvement for a teacher identified as deficient from two months to one year.
- § 1210.508 to require the state department of education to return testing results to the districts by May 31 of the testing year.

We look forward to working with you in the future on this exciting initiative.

Sincerely,

Glenn Coffee

Glenn Coffee
President Pro Tempore

July 28, 2009

Dr. Keith Ballard, Superintendent
Tulsa Public Schools
3027 S. New Haven
Tulsa, OK 74147

Dear Dr. Ballard,

The Tulsa philanthropic community has provided long-standing financial support to major social issues in partnership with Tulsa Public Schools. This support is evidenced by our dedicated collaborative funding to various district initiatives such as Educare, the Community Schools project, the school-based health care clinics, Teach for America, KIPP and several other early childhood initiatives. As demonstrated by the participation in and the comments during the Bill & Melinda Gates Foundation proposal presentation on July 21st, local philanthropic leaders are strongly committed to the transformational change of the district through your efforts regarding teacher effectiveness. With the goal of developing a district where all students can be successful, area foundations and donors are committed to helping fund and advocate for the strategies outlined in your proposal to the Gates Foundation -

- Secure $3 million per academic year in matching funds for strategies outlined in the proposal for academic years 2009-2013;
- Create an Advisory Board of major funders to provide oversight to the teacher effectiveness work and meet with TPS on a quarterly basis; and
- Ensure long-term funding stability of proven teacher effectiveness strategies beyond academic year 2013.

We, as community leaders, indicate our willingness to support and participate in the Tulsa Teacher Effectiveness Project.

Phil Lakin Jr. Tulsa Community Foundation	George B. Kaiser Kaiser Francis Oil Company	Stacy Schusterman Charles and Lynn Schusterman Family Foundation
Maggie Hille Yar Hille Foundation	Darton Zink John Steele Zink Foundation	Judy Kishner Anne and Henry Zarrow Foundation
Jerry Dickman Chapman Foundations	R.H. Harbaugh The Oxley Foundation	Ken Levit George Kaiser Family Foundation
Chet Cadieux QuikTrip Corporation	Kathy Craft Civic Leader	

July 28, 2009

Dr. Keith Ballard, Superintendent
Tulsa Public Schools
3027 South New Haven
Tulsa, OK 74147

Dear Dr. Ballard,

This letter outlines Tulsa Community Foundation's (TCF) roles and responsibilities as part of Tulsa Public School's (TPS) Teacher Effectiveness Project. TCF was created in late 1998 with the mission to *initiate, teach and encourage personal and corporate charitable giving today to ensure that the philanthropic needs of Oklahomans can be met for all generations.* As our public education system directly impacts the future prosperity of Tulsa, TCF is committed to help TPS transform the current system. TCF will closely collaborate with TPS to achieve the outcomes detailed in TPS' July 31, 2009 proposal to the Bill & Melinda Gates Foundation (Gates Foundation).

As a partner working with TPS to create the administrative, financial and program management processes and procedures necessary to ensure the effective governance of this project, TCF will –

- Act as fiscal agent and receive from the Gates Foundation and other local and national foundations and individuals all project funds and manage these assets according to the TPS investment policy;
- Dedicate a Program Officer to manage grant administration and compliance (20 hours per week expected);
- Work with TPS and outside consultants to generate, review and submit needed reports (either monthly, quarterly and/or year-end) to the Gates Foundation and other funders as required;
- Receive, review and process grant requests from TPS within five (5) business days;
- Establish and manage a community-lead Advisory Board of major funders that will provide guidance and oversight of the Gates Foundation grant and be responsible for securing $3 million in matching funds each academic year 2009-13, as well as the resources necessary for sustaining the Teacher Effectiveness Project beyond the 2013-2014 academic year; and
- Serve as a valuable thought partner and change agent locally and state-wide to fully implement the transformative strategies outlined in TPS' grant proposal.

Together with the help of other philanthropic and community leaders, I am confident that the Gates Foundation, TPS and TCF will create a new educational reality in Tulsa where all students can and do succeed.

Sincerely,

Phil Lakin, Jr.
Chief Executive Officer

July 29, 2009

Dr. Keith Ballard, Superintendent
Tulsa Public Schools
Education Service Center
3027 S. New Haven
Tulsa, OK 74114

Dear Dr. Ballard:

Please consider this letter a strong expression of our support for Tulsa Public School's application for a Gates Foundation grant. Tulsa Community College considers its partnership with Tulsa Public Schools critical to the long term success of our students and our community. In the past 12 months, the collaboration and visioning exhibited under your leadership has energized the members of our community committed to the highest level of educational attainment possible for our citizens. I believe this application and a successful award will distinguish Tulsa across the nation as a community dedicated to a continuum of educational excellence from birth to college graduation.

The model Tulsa has created with strong collaboration and seamless transfer among all its college and university institutions in order to serve the best interest of the student is a good one as well for the work Tulsa Public School has planned for its students for the future. Sharing data and information, integrating technical systems, and creating cooperative dialogue among the faculty in our classrooms through to the highest levels of administration are all critical elements in identifying and serving the needs of our students. We relish the opportunity to begin this work with Tulsa Public Schools under the observation and encouragement of one of the finest foundations in the world and one dedicated to essential educational outcomes.

We believe the Tulsa Achieves programs – our tuition-free grant to all graduating seniors in Tulsa County, our strong enrollment for students with education majors (TCC recently ranked second in the nation in the number of education degree graduates), our historic and deep commitment to early childhood development certificates and degrees, and, finally, our participation in the national Achieving the Dream project through the Lumina Foundation with support from the Gates Foundation demonstrate the considerable work that has been done to provide opportunities for Tulsa Public Schools students and will serve as building blocks for future innovation and enhanced outcomes.

Again, we believe this prospective grant award from the Gates Foundation is a critical turning point in the future of Tulsa and each and every student who attends your system and we look forward to the opportunity to support your initiatives and your vision.

Sincerely,

Thomas K. McKeon
President

United Way — Tulsa Area United Way — 85 YEARS

LIVE UNITED
GIVE. ADVOCATE. VOLUNTEER.

REACH OUT A HAND TO ON
INFLUENCE
THE CONDITION OF AL

OFFICE OF

JUL 2 9 2009

SUPERINTENDENT

July 27, 2009

Dr. Keith Ballard
Superintendent
Tulsa Public Schools
P.O. Box 470208
Tulsa, OK 74147

Dear Dr. Ballard,

The leadership of the Tulsa Area United Way strongly supports the Tulsa Public Schools' plan and proposal to the Bill and Melinda Gates Foundation. Public education is a high priority for the United Way of America and for the Tulsa Area United Way. The plan's focus on teacher effectiveness has the potential to transform education in the Tulsa community. Though Tulsans have long wanted to see significant improvement in public education, it seems that the "stars are aligned" now as never before. Our focus on early childhood development is demonstrating positive outcomes for our youngest learners, but our responsibility to them continues. The "Teach for America" contract and the significant changes in alternative education will support and promote the Gates Foundation partnership.

The Tulsa United Way has opportunities for school leaders to participate in the process of reviewing our 63 partner agencies and the subsequent allocation of funds. This is an "immersion program" in leadership and administration in the nonprofit sector. It is also a great way for school personnel to learn about agencies that address the critical basic, educational and youth development needs of their students.

Additionally, the Tulsa Area United Way provides Venture Grants for innovative programs that concentrate on emerging needs in the community or propose new ways to address systemic problems. These grants are available through an application process to all nonprofits in our community.

We welcome continuing discussions on ways that we can support the new, dynamic plan to prepare every student for success in college and life.

Sincerely,

Bill Grant
Chairman of the Board

Mark R. Graham
President and CEO

1430 S. Boulder • P.O. Box 1859 • Tulsa, OK 74101-1859 • (918) 583-7171 • Fax: (918) 582-5588 • www.tauw.org

Metropolitan Tulsa
Urban League

Empowering Communities.
Changing Lives.

United
Way
Tulsa Area United Way

July 31, 2009

Dr. Keith Ballard, Superintendent
Tulsa Public Schools
3027 S. New Haven
Tulsa, OK 74147

Dear Dr. Ballard:

The Tulsa Metropolitan Urban League has a commitment to the children of Tulsa and thereby
applauds and supports your transformational change of Tulsa Public Schools through your efforts
regarding teacher effectiveness. It is our commitment to this project that we will advocate for
strategies outlined in your Gates proposal to the broader community to ensure student
achievement for ALL students in the district. As an organization dedicated to minority children,
we will assist in any way possible to support your endeavors to close the racial achievement gap
to ensure that ALL students are college ready once they graduate from high school. It is also my
pledge to assist you in your efforts by serving on any committees needed for this worthwhile
endeavor.

I look forward to working with you on this exciting initiative in the very near future.

Sincerely,

Kimberly D. McCurry

Kimberly D. McCurry
Director of Programs

Partnerships to Empower Effective Teachers - Budget Summary

Tulsa Public Schools

PROJECT REVENUE	2009 / 2010	2010 / 2011	2011 / 2012	2012 / 2013	2013 / 2014	TOTAL
Project Revenue:						
Public Sources	399,996	3,649,460	2,962,261	3,734,331	6,587,242	**17,333,289**
Bill & Melinda Gates Foundation	9,859,552	12,120,397	15,176,400	11,515,095	6,925,697	**55,597,141**
Private & Other Revenue	3,000,000	3,000,000	3,000,000	3,000,000	3,000,000	**15,000,000**
Total Project Revenue	**$ 13,259,548**	**$ 18,769,857**	**$ 21,138,661**	**$ 18,249,425**	**$ 16,512,939**	**$ 87,930,430**
% of District Revenue	*4%*	*5%*	*6%*	*5%*	*4%*	

PROJECT COSTS	2009 / 2010	2010 / 2011	2011 / 2012	2012 / 2013	2013 / 2014	TOTAL
Direct Costs:						
Total Project FTE's	*14.0*	*28.0*	*27.5*	*11.0*	*10.5*	*91.0*
Personnel and Benefits Total	1,536,059	1,958,117	1,962,491	1,277,308	1,257,944	**7,991,919**
Other Personnel (Bonus, Stipend, etc.)	824,000	13,914,231	16,991,927	13,901,812	12,689,312	**58,321,282**
Consulting & Professional Fees	9,622,261	1,827,920	1,425,823	2,291,950	1,862,420	**17,030,374**
Equipment, Materials, Publications	1,212,228	1,002,989	690,156	708,360	631,488	**4,245,221**
Travel, Meetings, Conferences	25,000	25,000	25,000	25,000	25,000	**125,000**
Fiscal Agency Fees	40,000	41,600	43,264	44,995	46,775	**216,634**
Subtotal - Direct Costs	**$ 13,259,548**	**$ 18,769,857**	**$ 21,138,661**	**$ 18,249,425**	**$ 16,512,939**	**$ 87,930,430**
Subgrants	**-**	**-**	**-**	**-**	**-**	**-**
Total Project Costs	**$ 13,259,548**	**$ 18,769,857**	**$ 21,138,661**	**$ 18,249,425**	**$ 16,512,939**	**$ 87,930,430**

Project Surplus / Deficit	$ -	$ -	$ -	$ -	$ -	$ -

INITIATIVE SUMMARY	2009 / 2010	2010 / 2011	2011 / 2012	2012 / 2013	2013 / 2014	TOTAL
Initiative #1: Assess and set standards						
Public Revenue	124,940	215,573	147,371	216,271	439,659	**1,143,814**
BMGF Revenue	5,384,378	721,083	812,414	709,222	465,966	**8,093,063**
Private & Other Revenue	579,782	186,944	165,669	191,871	213,706	**1,337,971**
Total Revenue	**$ 6,089,100**	**$ 1,123,600**	**$ 1,125,454**	**$ 1,117,364**	**$ 1,119,331**	**$ 10,574,848**
Direct Cost & Subgrants	**$ 6,089,100**	**$ 1,123,600**	**$ 1,125,454**	**$ 1,117,364**	**$ 1,119,331**	**$ 10,574,848**
Initiative #2: Deploy and reward						
Public Revenue	4,514	2,579,734	2,006,155	2,592,980	4,764,073	**11,947,455**
BMGF Revenue	194,538	8,629,111	11,059,342	8,503,205	5,049,140	**33,435,336**
Private & Other Revenue	20,948	2,237,136	2,255,243	2,300,432	2,315,682	**9,129,441**
Total Revenue	**$ 220,000**	**$ 13,445,981**	**$ 15,320,740**	**$ 13,396,617**	**$ 12,128,894**	**$ 54,512,232**
Direct Cost & Subgrants	**$ 220,000**	**$ 13,445,981**	**$ 15,320,740**	**$ 13,396,617**	**$ 12,128,894**	**$ 54,512,232**
Initiative #3: Develop						
Public Revenue	2,897	192,224	284,647	77,478	158,130	**715,377**
BMGF Revenue	124,858	642,981	1,569,176	254,076	167,592	**2,758,683**
Private & Other Revenue	13,445	166,696	319,990	68,737	76,863	**645,729**
Total Revenue	**$ 141,200**	**$ 1,001,900**	**$ 2,173,813**	**$ 400,291**	**$ 402,586**	**$ 4,119,790**
Direct Cost & Subgrants	**$ 141,200**	**$ 1,001,900**	**$ 2,173,813**	**$ 400,291**	**$ 402,586**	**$ 4,119,790**
Initiative #4: Attract						
Public Revenue	6,197	99,575	67,960	216,588	405,749	**796,068**
BMGF Revenue	267,048	333,074	374,642	710,260	430,028	**2,115,053**
Private & Other Revenue	28,755	86,351	76,398	192,152	197,223	**580,879**
Total Revenue	**$ 302,000**	**$ 519,000**	**$ 519,000**	**$ 1,119,000**	**$ 1,033,000**	**$ 3,492,000**
Direct Cost & Subgrants	**$ 302,000**	**$ 519,000**	**$ 519,000**	**$ 1,119,000**	**$ 1,033,000**	**$ 3,492,000**
Initiative #5: IT Systems						
Public Revenue	76,947	372,319	162,521	278,196	404,315	**1,294,298**
BMGF Revenue	3,316,086	1,245,392	895,933	912,292	428,508	**6,798,211**
Private & Other Revenue	357,071	322,873	182,700	246,809	196,526	**1,305,980**
Total Revenue	**$ 3,750,105**	**$ 1,940,584**	**$ 1,241,154**	**$ 1,437,296**	**$ 1,029,350**	**$ 9,398,489**
Direct Cost & Subgrants	**$ 3,750,105**	**$ 1,940,584**	**$ 1,241,154**	**$ 1,437,296**	**$ 1,029,350**	**$ 9,398,489**
Initiative #6 - Project Administration						
Public Revenue	184,500	190,036	293,606	352,818	415,316	**1,436,276**
BMGF Revenue	532,643	507,156	421,629	381,045	337,688	**2,180,161**
Private & Other Revenue	2,000,000	-	-	-	-	**2,000,000**
Total Revenue	**$ 2,717,143**	**$ 697,192**	**$ 715,235**	**$ 733,863**	**$ 753,004**	**$ 5,616,437**
Direct Cost & Subgrants	**$ 2,717,143**	**$ 697,192**	**$ 715,235**	**$ 733,863**	**$ 753,004**	**$ 5,616,437**
TOTAL PROJECT REVENUE	**$ 13,219,548**	**$ 18,728,257**	**$ 21,095,397**	**$ 18,204,430**	**$ 16,466,164**	**$ 87,713,796**
TOTAL PROJECT COSTS	**$ 13,219,548**	**$ 18,728,257**	**$ 21,095,397**	**$ 18,204,430**	**$ 16,466,164**	**$ 87,713,796**

Project Surplus / Deficit	$ -	$ -	$ -	$ -	$ -	$ -

Partnerships to Empower Effective Teachers -District Total Revenue Summary
Tulsa Public Schools
Please enter total revenue information for organization

PUBLIC REVENUE SOURCES	2009 / 2010	2010 / 2011	2011 / 2012	2012 / 2013	2013 / 2014	TOTAL	Comments
1 State aid	95,776,033	98,840,866	102,003,774	105,267,895	108,636,467	510,525,035	
2 Ad valorem taxes	74,012,653	76,919,130	79,601,300	82,376,997	85,249,483	398,159,563	
3 IDEA, ARRA, and Title I	47,419,547	25,514,586	28,576,336	32,005,496	35,846,156	169,362,120	Includes IDEA, IDEA ARRA, Foundation and Salary Incentive - ARRA, Title I, and Title I - ARRA
4 FBA	19,690,550	20,478,172	21,297,299	22,149,191	23,035,158	106,650,370	
5 Other federal sources	29,067,494	35,149,870	37,506,702	41,826,214	45,163,913	188,714,194	
6 Other state sources	42,156,389	48,388,796	49,922,104	51,548,645	53,273,807	245,289,741	Includes 4 Yr Old & Charter Schools, Auto License Tags, State Land Earnings, and Other
7 Other local sources	20,850,265	21,842,091	22,564,795	23,277,768	24,031,540	112,566,459	Includes Before & After School Enrichment, County 4Mill, County Apportionment, and Other
8 Carryover sources	23,816,892	17,980,376	18,250,081	18,523,832	18,801,690	97,372,871	Includes prior year fund balances and lapsed appropriations
9						-	
10						-	
Total Public Sources	$ 352,789,823	$ 345,113,887	$ 359,722,391	$ 376,976,037	$ 394,038,215	$ 1,828,640,353	

PRIVATE REVENUE SOURCES	2009 / 2010	2010 / 2011	2011 / 2012	2012 / 2013	2013 / 2014	TOTAL	Comments
Foundations, Organizations & Corporations:							
1 Bill & Melinda Gates Foundation	9,819,552	12,078,797	15,133,136	11,470,100	6,878,922	55,380,507	
2 Coalition of local foundations	3,000,000	3,000,000	3,000,000	3,000,000	3,000,000	15,000,000	A group of local foundations have committed to support this initiative with $3m/yr in the first 5 years
3						-	
4						-	
5						-	
11 *Private Revenue not linked to this project*						-	
Subtotal Foundations, Orgs & Corps	$ 12,819,552	$ 15,078,797	$ 18,133,136	$ 14,470,100	$ 9,878,922	$ 70,380,507	
Other Revenue:							
1						-	
2						-	
3						-	
4						-	
5						-	
Subtotal Other Revenue	$ -	$ -	$ -	$ -	$ -	$ -	
Total Private Sources	$ 12,819,552	$ 15,078,797	$ 18,133,136	$ 14,470,100	$ 9,878,922	$ 70,380,507	
TOTAL ORGANIZATION REVENUE	$ 365,609,375	$ 360,192,684	$ 377,855,527	$ 391,446,137	$ 403,917,137	$ 1,899,020,860	

Partnerships to Empower Effective Teachers - Initiative Budget

Tulsa Public Schools

Initiative #1: Assess and set standards

SUMMARY METRICS	2009 / 2010	2010 / 2011	2011 / 2012	2012 / 2013	2013 / 2014	Totals
Initiative Revenue as a % of District Revenue	2%	0%	0%	0%	0%	1%
BMGF Grant as a % of Initiative Revenue	88%	64%	72%	63%	42%	77%
Initiative Public Revenue %	2%	19%	13%	19%	39%	11%
Initiative Private Revenue %	98%	81%	87%	81%	61%	89%
Personnel Costs %	12%	22%	23%	22%	22%	16%
Consulting Costs %	88%	77%	77%	78%	78%	84%
Equip & Travel Expenses Cost %	0%	0%	0%	0%	0%	0%
Sub-grants Fees Cost %	0%	0%	0%	0%	0%	0%

SOURCES OF FUNDING	2009 / 2010 Initiative Revenue	2010 / 2011 Initiative Revenue	2011 / 2012 Initiative Revenue	2012 / 2013 Initiative Revenue	2013 / 2014 Initiative Revenue	Total Funding Initiative Revenue
PUBLIC SOURCES:						
1 State aid	124,940	215,573	147,371	216,271	439,659	1,143,814
2 Ad valorem taxes						-
3 IDEA, ARRA, and Title I						-
4 FBA						-
5 Other federal sources						-
6 Other state sources						-
7 Other local sources						-
8 Carryover sources						-
9	0					-
10	0					-
Subtotal - Public Sources	124,940	215,573	147,371	216,271	439,659	1,143,814
Foundations, Organizations & Corporations:						
1 Bill & Melinda Gates Foundation	5,384,378	721,083	812,414	709,222	465,966	8,093,063
2 Coalition of local foundations	579,782	186,944	165,669	191,871	213,706	1,337,971
3	0					-
4	0					-
5	0					-
6	0					-
7	0					-
8	0					-
9	0					-
10	0					-
Subtotal - Foundations, Orgs & Corp:	5,964,160	908,027	978,083	901,092	679,672	9,431,034
Other Funding:						
1	0					-
2	0					-
3	0					-
4	0					-
5	0					-
Subtotal - Other Funding:	-	-	-	-	-	-
TOTAL INITIATIVE FUNDING	$ 6,089,100	$ 1,123,600	$ 1,125,454	$ 1,117,364	$ 1,119,331	$ 10,574,848

USES OF FUNDING	2009 / 2010 Total Budget	2009 / 2010 BMGF Funded	2010 / 2011 Total Budget	2010 / 2011 BMGF Funded	2011 / 2012 Total Budget	2011 / 2012 BMGF Funded	2012 / 2013 Total Budget	2012 / 2013 BMGF Funded	2013 / 2014 Total Budget	2013 / 2014 BMGF Funded	Total Initiative Budget Total Budget	Total Initiative Budget BMGF Funded
PERSONNEL DETAIL:	*Total Comp & Benefits*											
Job Function/Title												
1 HR Manager - Assessment	60,000	53,056	61,800	39,661	63,654	45,949	65,564	41,615	67,531	28,112	318,548	208,393
2											-	-
3											-	-
4											-	-
5											-	-
6											-	-
7											-	-
8											-	-
9											-	-
10											-	-
11											-	-
12											-	-
13											-	-
14											-	-
15											-	-
Budgeted FTE Per Position Noted Above												
1 HR Manager - Assessment	0.5	0.4	0.5	0.3	0.5	0.4	0.5	0.3	0.5	0.2	2.5	1.6
2 0											0.0	0.0
3 0											0.0	0.0
4 0											0.0	0.0
5 0											0.0	0.0
6 0											0.0	0.0
7 0											0.0	0.0
8 0											0.0	0.0
9 0											0.0	0.0
10 0											0.0	0.0
11 0											0.0	0.0
12 0											0.0	0.0
13 0											0.0	0.0
14 0											0.0	0.0
15 0											0.0	0.0
DIRECT COSTS:												
Personnel and Benefits Total	60,000	53,056	61,800	39,661	63,654	45,949	65,564	41,615	67,531	28,112	318,548	208,393
Other Personnel (Bonus, Stipend, etc.)	654,000	578,309	190,000	121,935	190,000	137,152	180,000	114,251	180,000	74,932	1,394,000	1,026,580
Consulting & Professional Fees	5,370,000	4,748,503	870,000	558,332	870,000	628,013	870,000	552,213	870,000	362,172	8,850,000	6,849,234
Equipment, Materials, Publications	5,100	4,510	1,800	1,155	1,800	1,299	1,800	1,143	1,800	749	12,300	8,856
Travel, Meetings, Conferences	-	-	-	-	-	-	-	-	-	-	-	-
Total Direct Costs	$ 6,089,100	$ 5,384,378	$ 1,123,600	$ 721,083	$ 1,125,454	$ 812,414	$ 1,117,364	$ 709,222	$ 1,119,331	$ 465,966	$ 10,574,848	$ 8,093,063
SUBGRANT DETAIL:												
1											-	-
2											-	-
3											-	-
4											-	-
5											-	-
6											-	-
7											-	-
8											-	-
9											-	-
10											-	-
11											-	-
12											-	-
13											-	-
14											-	-
15											-	-
16											-	-
17											-	-
18											-	-
19											-	-
20											-	-
Total Subgrants	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
TOTAL DIRECT COSTS & SUBGRANTS	$ 6,089,100	$ 5,384,378	$ 1,123,600	$ 721,083	$ 1,125,454	$ 812,414	$ 1,117,364	$ 709,222	$ 1,119,331	$ 465,966	$ 10,574,848	$ 8,093,063
Variance	-	-	-	-	-	-	-	-	-	-	-	-

Partnerships to Empower Effective Teachers - Initiative Budget

Tulsa Public Schools

Initiative #2: Deploy and reward

SUMMARY METRICS	2009 / 2010	2010 / 2011	2011 / 2012	2012 / 2013	2013 / 2014	Totals
Initiative Revenue as a % of District Revenue	0%	4%	4%	3%	3%	3%
BMGF Grant as a % of Initiative Revenue	88%	64%	72%	63%	42%	61%
Initiative Public Revenue %	2%	19%	13%	19%	39%	22%
Initiative Private Revenue %	98%	81%	87%	81%	61%	78%
Personnel Costs %	95%	100%	100%	100%	100%	100%
Consulting Costs %	0%	0%	0%	0%	0%	0%
Equip & Travel Expenses Cost %	5%	0%	0%	0%	0%	0%
Sub-grants Fees Cost %	0%	0%	0%	0%	0%	0%

SOURCES OF FUNDING	2009 / 2010 Initiative Revenue	2010 / 2011 Initiative Revenue	2011 / 2012 Initiative Revenue	2012 / 2013 Initiative Revenue	2013 / 2014 Initiative Revenue	Total Funding Initiative Revenue
PUBLIC SOURCES:						
1 State aid	4,514	2,579,734	2,006,155	2,592,980	4,764,073	11,947,455
2 Ad valorem taxes						-
3 IDEA, ARRA, and Title I						-
4 FBA						-
5 Other federal sources						-
6 Other state sources						-
7 Other local sources						-
8 Carryover sources						-
9	0					-
10	0					-
Subtotal - Public Sources	4,514	2,579,734	2,006,155	2,592,980	4,764,073	11,947,455
Foundations, Organizations & Corporations:						
1 Bill & Melinda Gates Foundation	194,538	8,629,111	11,059,342	8,503,205	5,049,140	33,435,336
2 Coalition of local foundations	20,948	2,237,136	2,255,243	2,300,432	2,315,682	9,129,441
3	0					-
4	0					-
5	0					-
Subtotal - Foundations, Orgs & Corp:	215,486	10,866,247	13,314,585	10,803,637	7,364,822	42,564,777
Other Funding:						
1	0					-
2	0					-
3	0					-
Subtotal - Other Funding:	-	-	-	-	-	-
TOTAL INITIATIVE FUNDING	$ 220,000	$ 13,445,981	$ 15,320,740	$ 13,396,617	$ 12,128,894	$ 54,512,232

USES OF FUNDING	2009 / 2010 Total Budget	2009 / 2010 BMGF Funded	2010 / 2011 Total Budget	2010 / 2011 BMGF Funded	2011 / 2012 Total Budget	2011 / 2012 BMGF Funded	2012 / 2013 Total Budget	2012 / 2013 BMGF Funded	2013 / 2014 Total Budget	2013 / 2014 BMGF Funded	Total Initiative Budget Total Budget	Total Initiative Budget BMGF Funded
PERSONNEL DETAIL:	Total Comp & Benefits											
Job Function/Title												
1 Communication Specialist - Compensation	205,000	181,274	211,150	135,508	163,113	117,744	112,005	71,092	57,682	24,013	748,950	529,631
2											-	-
3											-	-
4											-	-
5											-	-
Budgeted FTE Per Position Noted Above												
1 Communication Specialist - Compensation	2.0	1.8	2.0	1.3	1.5	1.1	1.0	0.6	0.5	0.2	7.0	5.0
2 0											0.0	0.0
3 0											0.0	0.0
4 0											0.0	0.0
5 0											0.0	0.0
DIRECT COSTS:												
Personnel and Benefits Total	205,000	181,274	211,150	135,508	163,113	117,744	112,005	71,092	57,682	24,013	748,950	529,631
Other Personnel (Bonus, Stipend, etc.)	4,000	3,537	13,231,231	8,491,293	15,154,927	10,939,649	13,282,812	8,430,970	12,070,312	5,024,752	53,743,282	32,890,202
Consulting & Professional Fees				-		-		-		-	-	-
Equipment, Materials, Publications	11,000	9,727	3,600	2,310	2,700	1,949	1,800	1,143	900	375	20,000	15,503
Travel, Meetings, Conferences		-		-		-		-		-	-	-
Total Direct Costs	$ 220,000	$ 194,538	$ 13,445,981	$ 8,629,111	$ 15,320,740	$ 11,059,342	$ 13,396,617	$ 8,503,205	$ 12,128,894	$ 5,049,140	$ 54,512,232	$ 33,435,336
SUBGRANT DETAIL:												
1											-	-
2											-	-
3											-	-
4											-	-
5											-	-
Total Subgrants	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
TOTAL DIRECT COSTS & SUBGRANTS	$ 220,000	$ 194,538	$ 13,445,981	$ 8,629,111	$ 15,320,740	$ 11,059,342	$ 13,396,617	$ 8,503,205	$ 12,128,894	$ 5,049,140	$ 54,512,232	$ 33,435,336
Variance	-	-	-	-	-	-	-	-	-	-	-	-

Partnerships to Empower Effective Teachers - Initiative Budget

Tulsa Public Schools

Initiative #3: Develop

SUMMARY METRICS	2009 / 2010	2010 / 2011	2011 / 2012	2012 / 2013	2013 / 2014	Totals
Initiative Revenue as a % of District Revenue	0%	0%	1%	0%	0%	0%
BMGF Grant as a % of Initiative Revenue	88%	64%	72%	63%	42%	67%
Initiative Public Revenue %	2%	19%	13%	19%	39%	17%
Initiative Private Revenue %	98%	81%	87%	81%	61%	83%
Personnel Costs %	97%	97%	99%	100%	100%	98%
Consulting Costs %	0%	0%	0%	0%	0%	0%
Equip & Travel Expenses Cost %	3%	3%	1%	0%	0%	2%
Sub-grants Fees Cost %	0%	0%	0%	0%	0%	0%

SOURCES OF FUNDING	2009 / 2010 Initiative Revenue	2010 / 2011 Initiative Revenue	2011 / 2012 Initiative Revenue	2012 / 2013 Initiative Revenue	2013 / 2014 Initiative Revenue	Total Funding Initiative Revenue
PUBLIC SOURCES:						
1 State aid	2,897	192,224	284,647	77,478	158,130	715,377
2 Ad valorem taxes						-
3 IDEA, ARRA, and Title I						-
4 FBA						-
5 Other federal sources						-
6 Other state sources						-
7 Other local sources						-
8 Carryover sources						-
9 0						-
10 0						-
Subtotal - Public Sources	2,897	192,224	284,647	77,478	158,130	715,377
Foundations, Organizations & Corporations:						
1 Bill & Melinda Gates Foundation	124,858	642,981	1,569,176	254,076	167,592	2,758,683
2 Coalition of local foundations	13,445	166,696	319,990	68,737	76,863	645,729
3 0						-
4 0						-
5 0						-
Subtotal - Foundations, Orgs & Corp:	138,303	809,676	1,889,166	322,813	244,455	3,404,413
Other Funding:						
1 0						-
2 0						-
3 0						-
Subtotal - Other Funding:	-	-	-	-	-	-
TOTAL INITIATIVE FUNDING	$ 141,200	$ 1,001,900	$ 2,173,813	$ 400,291	$ 402,586	$ 4,119,790

USES OF FUNDING	2009 / 2010 Total Budget	2009 / 2010 BMGF Funded	2010 / 2011 Total Budget	2010 / 2011 BMGF Funded	2011 / 2012 Total Budget	2011 / 2012 BMGF Funded	2012 / 2013 Total Budget	2012 / 2013 BMGF Funded	2013 / 2014 Total Budget	2013 / 2014 BMGF Funded	Total Initiative Budget Total Budget	Total Initiative Budget BMGF Funded
PERSONNEL DETAIL:	Total Comp & Benefits											
Job Function/Title												
1 Content Director - PD	35,000	30,949	72,100	46,271	74,263	53,607	76,491	48,551	78,786	32,798	336,640	212,176
2 School Administration Managers	-		525,000	336,925	540,750	390,343	-		-		1,065,750	727,267
3											-	-
4											-	-
5											-	-
Budgeted FTE Per Position Noted Above												
1 Content Director - PD	0.5	0.4	1.0	0.6	1.0	0.7	1.0	0.6	1.0	0.4	4.5	2.9
2 School Administration Managers	0.0		15.0	9.6	15.0	10.8	0.0		0.0		30.0	20.5
3 0											0.0	0.0
4 0											0.0	0.0
5 0											0.0	0.0
DIRECT COSTS:												
Personnel and Benefits Total	35,000	30,949	597,100	383,196	615,013	443,950	76,491	48,551	78,786	32,798	1,402,390	939,443
Other Personnel (Bonus, Stipend, etc.)	102,000	90,195	376,000	241,302	1,530,000	1,104,437	322,000	204,382	322,000	134,045	2,652,000	1,774,362
Consulting & Professional Fees					-						-	
Equipment, Materials, Publications	4,200	3,714	28,800	18,483	28,800	20,789	1,800	1,143	1,800	749	65,400	44,878
Travel, Meetings, Conferences					-						-	
Total Direct Costs	$ 141,200	$ 124,858	$ 1,001,900	$ 642,981	$ 2,173,813	$ 1,569,176	$ 400,291	$ 254,076	$ 402,586	$ 167,592	$ 4,119,790	$ 2,758,683
SUBGRANT DETAIL:												
1											-	-
2											-	-
3											-	-
4											-	-
5											-	-
Total Subgrants	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
TOTAL DIRECT COSTS & SUBGRANTS	$ 141,200	$ 124,858	$ 1,001,900	$ 642,981	$ 2,173,813	$ 1,569,176	$ 400,291	$ 254,076	$ 402,586	$ 167,592	$ 4,119,790	$ 2,758,683
Variance	-	-	-	-	-	-	-	-	-	-	-	-

Partnerships to Empower Effective Teachers - Initiative Budget

Tulsa Public Schools

Initiative #4: Attract

SUMMARY METRICS	2009 / 2010	2010 / 2011	2011 / 2012	2012 / 2013	2013 / 2014	Totals
Initiative Revenue as a % of District Revenue	0%	0%	0%	0%	0%	0%
BMGF Grant as a % of Initiative Revenue	88%	64%	72%	63%	42%	61%
Initiative Public Revenue %	2%	19%	13%	19%	39%	23%
Initiative Private Revenue %	98%	81%	87%	81%	61%	77%
Personnel Costs %	21%	23%	23%	10%	11%	15%
Consulting Costs %	79%	77%	77%	90%	89%	85%
Equip & Travel Expenses Cost %	0%	0%	0%	0%	0%	0%
Sub-grants Fees Cost %	0%	0%	0%	0%	0%	0%

SOURCES OF FUNDING	2009 / 2010 Initiative Revenue	2010 / 2011 Initiative Revenue	2011 / 2012 Initiative Revenue	2012 / 2013 Initiative Revenue	2013 / 2014 Initiative Revenue	Total Funding Initiative Revenue
PUBLIC SOURCES:						
1 State aid	6,197	99,575	67,960	216,588	405,749	796,068
2 Ad valorem taxes						-
3 IDEA, ARRA, and Title I						-
4 FBA						-
5 Other federal sources						-
6 Other state sources						-
7 Other local sources						-
8 Carryover sources						-
9	0					-
10	0					-
Subtotal - Public Sources	6,197	99,575	67,960	216,588	405,749	796,068
Foundations, Organizations & Corporations:						
1 Bill & Melinda Gates Foundation	267,048	333,074	374,642	710,260	430,028	2,115,053
2 Coalition of local foundations	28,755	86,351	76,398	192,152	197,223	580,879
3	0					-
4	0					-
5	0					-
Subtotal - Foundations, Orgs & Corp:	295,803	419,425	451,040	902,412	627,251	2,695,932
Other Funding:						
1	0					-
2	0					-
3	0					-
Subtotal - Other Funding:	-	-	-	-	-	-
TOTAL INITIATIVE FUNDING	$ 302,000	$ 519,000	$ 519,000	$ 1,119,000	$ 1,033,000	$ 3,492,000

USES OF FUNDING	2009 / 2010 Total Budget	BMGF Funded	2010 / 2011 Total Budget	BMGF Funded	2011 / 2012 Total Budget	BMGF Funded	2012 / 2013 Total Budget	BMGF Funded	2013 / 2014 Total Budget	BMGF Funded	Total Initiative Budget Total Budget	BMGF Funded
PERSONNEL DETAIL:	*Total Comp & Benefits*											
Job Function/Title												
1											-	-
2											-	-
3											-	-
4											-	-
5											-	-
Budgeted FTE Per Position Noted Above												
1 0											0.0	0.0
2 0											0.0	0.0
3 0											0.0	0.0
4 0											0.0	0.0
5 0											0.0	0.0
DIRECT COSTS:												
Personnel and Benefits Total	-	-										
Other Personnel (Bonus, Stipend, etc.)	64,000	56,593	117,000	75,086	117,000	84,457	117,000	74,263	117,000	48,706	532,000	339,105
Consulting & Professional Fees	238,000	210,455	402,000	257,988	402,000	290,185	1,002,000	635,997	916,000	381,322	2,960,000	1,775,948
Equipment, Materials, Publications		-								-		
Travel, Meetings, Conferences		-								-		
Total Direct Costs	$ 302,000	$ 267,048	$ 519,000	$ 333,074	$ 519,000	$ 374,642	$ 1,119,000	$ 710,260	$ 1,033,000	$ 430,028	$ 3,492,000	$ 2,115,053
SUBGRANT DETAIL:												
1											-	
2											-	
3											-	
4											-	
5											-	
Total Subgrants	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
TOTAL DIRECT COSTS & SUBGRANTS	$ 302,000	$ 267,048	$ 519,000	$ 333,074	$ 519,000	$ 374,642	$ 1,119,000	$ 710,260	$ 1,033,000	$ 430,028	$ 3,492,000	$ 2,115,053
Variance	-	-	-	-	-	-	-	-	-	-	-	-

Partnerships to Empower Effective Teachers - Initiative Budget

Tulsa Public Schools

Initiative #5: IT Systems

SUMMARY METRICS	2009 / 2010	2010 / 2011	2011 / 2012	2012 / 2013	2013 / 2014	Totals
Initiative Revenue as a % of District Revenue	1%	1%	0%	0%	0%	0%
BMGF Grant as a % of Initiative Revenue	88%	64%	72%	63%	42%	72%
Initiative Public Revenue %	2%	19%	13%	19%	39%	14%
Initiative Private Revenue %	98%	81%	87%	81%	61%	86%
Personnel Costs %	17%	25%	40%	27%	39%	26%
Consulting Costs %	52%	26%	8%	25%	2%	31%
Equip & Travel Expenses Cost %	31%	49%	52%	48%	59%	43%
Sub-grants Fees Cost %	0%	0%	0%	0%	0%	0%

SOURCES OF FUNDING	2009 / 2010 Initiative Revenue	2010 / 2011 Initiative Revenue	2011 / 2012 Initiative Revenue	2012 / 2013 Initiative Revenue	2013 / 2014 Initiative Revenue	Total Funding Initiative Revenue
PUBLIC SOURCES:						
1 State aid	76,947	372,319	162,521	278,196	404,315	1,294,298
2 Ad valorem taxes						-
3 IDEA, ARRA, and Title I						-
4 FBA						-
5 Other federal sources						-
6 Other state sources						-
7 Other local sources						-
8 Carryover sources						-
9	0					-
10	0					-
Subtotal - Public Sources	76,947	372,319	162,521	278,196	404,315	1,294,298
Foundations, Organizations & Corporations:						
1 Bill & Melinda Gates Foundation	3,316,086	1,245,392	895,933	912,292	428,508	6,798,211
2 Coalition of local foundations	357,071	322,873	182,700	246,809	196,526	1,305,980
3	0					-
4	0					-
5	0					-
Subtotal - Foundations, Orgs & Corp:	3,673,157	1,568,265	1,078,633	1,159,101	625,035	8,104,191
Other Funding:						
1	0					-
2	0					-
3	0					-
Subtotal - Other Funding:	-	-	-	-	-	-
TOTAL INITIATIVE FUNDING	$ 3,750,105	$ 1,940,584	$ 1,241,154	$ 1,437,296	$ 1,029,350	$ 9,398,489

USES OF FUNDING	2009 / 2010 Total Budget	2009 / 2010 BMGF Funded	2010 / 2011 Total Budget	2010 / 2011 BMGF Funded	2011 / 2012 Total Budget	2011 / 2012 BMGF Funded	2012 / 2013 Total Budget	2012 / 2013 BMGF Funded	2013 / 2014 Total Budget	2013 / 2014 BMGF Funded	Total Initiative Budget Total Budget	Total Initiative Budget BMGF Funded
PERSONNEL DETAIL:	*Total Comp & Benefits*											
Job Function/Title												
1 Project Manager	120,000	106,112	123,600	79,322	127,308	91,898	-	-	-	-	370,908	277,331
2 Subject Matter Expert	120,000	106,112	-	-	-	-	-	-	-	-	120,000	106,112
3 Data Auditor	140,000	123,797	144,200	92,542	148,526	107,214	152,982	97,102	157,571	65,595	743,279	486,250
4 Data Validation Engineer	62,500	55,267	-	-	-	-	-	-	-	-	62,500	55,267
5 Application Developer	209,616	185,356	218,875	140,466	225,441	162,736	232,204	147,387	239,171	99,564	1,125,307	735,508
Budgeted FTE Per Position Noted Above												
1 Project Manager	1.0	0.9	1.0	0.6	1.0	0.7	0.0		0.0		3.0	2.2
2 Subject Matter Expert	1.0	0.9	0.0		0.0		0.0		0.0		1.0	0.9
3 Data Auditor	2.0	1.8	2.0	1.3	2.0	1.4	2.0	1.3	2.0	0.8	10.0	6.6
4 Data Validation Engineer	0.5	0.4	0.0		0.0		0.0		0.0		0.5	0.4
5 Application Developer	1.5	1.3	1.5	1.0	1.5	1.1	1.5	1.0	1.5	0.6	7.5	4.9
DIRECT COSTS:												
Personnel and Benefits Total	652,116	576,643	486,675	312,329	501,275	361,848	385,186	244,488	396,742	165,160	2,421,994	1,660,468
Other Personnel (Bonus, Stipend, etc.)	-	-	-	-	-	-	-	-	-	-	-	-
Consulting & Professional Fees	1,939,261	1,714,821	500,920	321,471	98,823	71,336	364,950	231,644	21,420	8,917	2,925,374	2,348,188
Equipment, Materials, Publications	1,158,728	1,024,623	952,989	611,592	641,056	462,749	687,160	436,160	611,188	254,432	4,051,121	2,789,554
Travel, Meetings, Conferences	-	-	-	-	-	-	-	-	-	-	-	-
Total Direct Costs	$ 3,750,105	$ 3,316,086	$ 1,940,584	$ 1,245,392	$ 1,241,154	$ 895,933	$ 1,437,296	$ 912,292	$ 1,029,350	$ 428,508	$ 9,398,489	$ 6,798,211
SUBGRANT DETAIL:												
1											-	-
2											-	-
3											-	-
4											-	-
5											-	-
Total Subgrants	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
TOTAL DIRECT COSTS & SUBGRANTS	$ 3,750,105	$ 3,316,086	$ 1,940,584	$ 1,245,392	$ 1,241,154	$ 895,933	$ 1,437,296	$ 912,292	$ 1,029,350	$ 428,508	$ 9,398,489	$ 6,798,211
Variance	-	-	-	-	-	-	-	-	-	-	-	-

Partnerships to Empower Effective Teachers - Initiative Budget

Tulsa Public Schools

Initiative #6 - Project Administration

SOURCES OF FUNDING	2009 / 2010 Initiative Revenue	2010 / 2011 Initiative Revenue	2011 / 2012 Initiative Revenue	2012 / 2013 Initiative Revenue	2013 / 2014 Initiative Revenue	Total Funding Initiative Revenue
PUBLIC SOURCES:						
1 State aid	184,500	190,036	293,606	352,818	415,316	**1,436,276**
2 Ad valorem taxes						-
3 IDEA, ARRA, and Title I						-
4 FBA						-
5 Other federal sources						-
Subtotal - Public Sources	184,500	190,036	293,606	352,818	415,316	1,436,276
Foundations, Organizations & Corporations:						
1 Bill & Melinda Gates Foundation	532,643	507,156	421,629	381,045	337,688	2,180,161
2 Coalition of local foundations	2,000,000	-	-	-	-	2,000,000
3	0					-
4	0					-
5	0					-
Subtotal - Foundations, Orgs & Corp:	2,532,643	507,156	421,629	381,045	337,688	4,180,161
Other Funding:						
1	0					-
2	0					-
3	0					-
Subtotal - Other Funding:	-	-	-	-	-	-
TOTAL INITIATIVE FUNDING	$ 2,717,143	$ 697,192	$ 715,235	$ 733,863	$ 753,004	$ 5,616,437

USES OF FUNDING	2009 / 2010 Total Budget	2009 / 2010 BMGF Funded	2010 / 2011 Total Budget	2010 / 2011 BMGF Funded	2011 / 2012 Total Budget	2011 / 2012 BMGF Funded	2012 / 2013 Total Budget	2012 / 2013 BMGF Funded	2013 / 2014 Total Budget	2013 / 2014 BMGF Funded	Total Initiative Budget Total Budget	Total Initiative Budget BMGF Funded
PERSONNEL DETAIL: Job Function/Title	*Total Comp & Benefits*											
1 Executive Director of Program Management	122,693	122,693	126,374	126,374	130,165	130,165	134,115	134,115	138,138	138,138	**651,485**	**651,485**
2 Director of Portfolio Management	92,250	92,250	95,018	95,018	97,869	48,935	100,805	25,201	103,829	-	**489,771**	**261,404**
3 Director of Change Management	92,250	92,250	95,018	95,018	97,869	48,935	100,805	25,201	103,829	-	**489,771**	**261,404**
4 Director of Reporting Management	92,250		95,018		97,869		100,805		103,829		**489,771**	**-**
5 Director of Federal Programs Management	92,250	-	95,018	-	97,869	-	100,805	-	103,829	-	**489,771**	**-**
Budgeted FTE Per Position Noted Above												
1 Executive Director of Program Management	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	**5.0**	**5.0**
2 Director of Portfolio Management	1.0	1.0	1.0	1.0	1.0	0.5	1.0	0.25	1.0	0.0	**5.0**	**2.8**
3 Director of Change Management	1.0	1.0	1.0	1.0	1.0	0.5	1.0	0.25	1.0	0.0	**5.0**	**2.8**
4 Director of Reporting Management	1.0	0.0	1.0	0.0	1.0	0.0	1.0	0.0	1.0	0.0	**5.0**	**0.0**
5 Director of Federal Programs Management	1.0	0.0	1.0	0.0	1.0	0.0	1.0	0.0	1.0	0.0	**5.0**	**0.0**
DIRECT COSTS:												
Personnel and Benefits Total	583,943	399,443	601,392	411,356	619,435	325,829	638,063	285,245	657,204	241,888	3,100,037	1,663,761
Other Personnel (Bonus, Stipend, etc.)											-	-
Consulting & Professional Fees	2,075,000	75,000	55,000	55,000	55,000	55,000	55,000	55,000	55,000	55,000	2,295,000	295,000
Equipment, Materials, Publications	33,200	33,200	15,800	15,800	15,800	15,800	15,800	15,800	15,800	15,800	96,400	96,400
Travel, Meetings, Conferences	25,000	25,000	25,000	25,000	25,000	25,000	25,000	25,000	25,000	25,000	125,000	125,000
Total Direct Costs	$ 2,717,143	$ 532,643	$ 697,192	$ 507,156	$ 715,235	$ 421,629	$ 733,863	$ 381,045	$ 753,004	$ 337,688	$ 5,616,437	$ 2,180,161
SUBGRANT DETAIL:												
1											-	-
2											-	-
3											-	-
4											-	-
5											-	-
Total Subgrants	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
TOTAL DIRECT COSTS & SUBGRANTS	$ 2,717,143	$ 532,643	$ 697,192	$ 507,156	$ 715,235	$ 421,629	$ 733,863	$ 381,045	$ 753,004	$ 337,688	$ 5,616,437	$ 2,180,161
Variance	-	-	-	-	-	-	-	-	-	-	-	-