School Check-Elementary
Self-assessment tool for strategic resource use

This school assessment tool is based on resource strategies and principles from **"The Strategic School: Making the Most of People, Time, and Money"** by Karen Hawley Miles and Stephen Frank (2008), as well as ERS' other learnings from the resource practices of high-performing schools around the nation. The purpose of this tool is to help you do a healthy school check-up: thinking about your current structure, where are and aren't you using resources strategically? Are there any areas in which you could reduce spending? Areas where you should increase your current investment?

The assessment is organized according to four primary principles we've seen high-performing schools use to organize resources:

1.	**Prioritize Teaching Effectiveness**
2.	**Target Individual Attention**
3.	**Maximize Academic Time**
4.	**Minimize Non-instructional Spending**

Within each principle, we've laid out more specific strategic practices, and written descriptors that identify what these practices look like along a developmental spectrum. For each practice, school leaders should choose which description—level 1, 2, 3, or 4—most closely matches their current situation, and circle that box. Higher numbers represent areas where the school is already making strategic choices; lower numbers represent opportunities to focus attention and reform. At the end of each section, school leaders can tally their points to identify areas of strength and potential growth.

Keep in mind that that this tool is designed to be a conversation starter, *not* a high-stakes evaluation of resource use at a school; our descriptors are leading indicators of success, but they are not absolute "to do's" that every school must accomplish. It may be a strategic choice for a school to be farther behind on the developmental spectrum for any given practice given their student needs and school priorities. In fact, it's a fundamental premise of resource use that while you can do *anything*, you can't do *everything.* Finally, please note that while in many places we've used specific quantitative cut-points to clearly distinguish between developmental levels, these cut-points are also are designed to be conversation starters, not absolute divisions between "good" and "bad" practices.

Practice	Data source	1	2	3	4
MEASURE STUDENT NEED AND TEACHER CAPACITY					
Formative assessments are conducted regularly and are common across classrooms; data is organized to allow easy interpretation for teacher decision-making	N/A	No formative data that is shared across classrooms exists	Formative assessment data that is shared across classrooms is too infrequent to adequately support student progress monitoring and adjustment of instruction; data also may not be organized in a useful format	Formative assessment data that is shared across classrooms is frequent enough to support student progress monitoring and adjustment of instruction, but teachers have to spend extra time to organize data in a useful format	Formative assessment data that is shared across classrooms is frequent enough and organized well in order to support student progress monitoring and adjustment of instruction
Teachers are evaluated through a mix of formal and informal evaluations in a way that is regular, rigorous, and fair	Teacher inventory	Formal and/or informal evaluations happen infrequently or not at all	A mix of formal and informal evaluations happen frequently; resulting data shows too little meaningful differentiation across teachers	A mix of formal and informal evaluations happen frequently; resulting data shows meaningful differentiation across teachers; teachers don't consistently trust evaluation data	A mix of formal and informal evaluations happen frequently; resulting data shows meaningful differentiation across teachers and teachers believe the data and view it as a powerful tool for their own development

Overall score: _____/8

Practice	Data source	1	2	3	4
HIRING AND STRATEGIC RETENTION : Ensure teacher workforce fits the vision and needs of the school through deliberate hiring and retention efforts that keep top talent and actively exit consistent under-performers who do not improve					
New hires are deliberately selected to fill missing capabilities on the faculty and gaps in expertise on teaching teams	N/A	Teachers are hired without consideration of school needs (often due to forced placement)	New hires are recruiting and selected based on specific content needs in positions open or expected to open	New hires *are recruited* to fill expertise gaps identified during the development of the preliminary schedule and staffing plan; a weak hiring pool means the teachers selected often don't meet identified needs.	New hires *are recruited and selected* to fill expertise gaps identified during the development of the preliminary schedule and staffing plan, with existing teachers are reassigned as necessary to ensure expertise is balanced.
Hiring timeline allows the school to attract top quality candidates	N/A	Hiring decisions are made after other schools in the area; all positions are not filled until after school begins	Hiring decisions are made after other schools in the area, but all positions are filled before the start of the year	Hiring decisions are made at the same time as other schools in the area	Hiring decisions are made before most other schools in the area
Rigorous interview process includes lesson demonstrations, assessment of expertise, philosophy, and commitment	N/A	Interview process does not include a rigorous assessment of instructional practice, expertise, philosophy, and commitment	Informal process exists that often includes many of these components	Formal process that includes a rigorous assessment of instructional practice, expertise, philosophy, and commitment exists, but is inconsistently implemented (often due to challenges with timeline, or differences in interviewer capacity)	Formal process that includes a rigorous assessment of instructional practice, expertise, philosophy, and commitment exists and is consistently implemented

Teachers who consistently under-perform on regular, rigorous, and fair evaluations are exited efficiently, while effective teachers are deliberately retained	N/A	Retention rates for low-performing teachers are higher than for high-performing teachers	Low-performing teachers and high performing teachers are retained at similar rates	Retention rates for low-performing teachers are somewhat lower than for high-performing teachers	Retention rates for low-performing teachers are significantly lower than for high-performing teachers
Compensation system is designed to attract and retain high performers, while managing the mix of expertise and roles within the teacher workforce to ensure fiscal sustainability	Support and Compensation	Compensation for highest performing and consistently effective teachers is below what they would make in neighboring schools/districts	Compensation for highest performing teachers is at the average of what they could make in neighboring schools/districts, and/or effective teachers don't have the opportunity to make a family wage.	Attractive compensation trajectory for highest performers and possibility of family wage for consistently effective teachers; too many high paid teachers without additional roles that capture efficiency means compensation structure is not sustainable	Attractive compensation trajectory for highest performers and possibility of family wage for consistently effective teachers; mix of expertise and roles ensures pay structure is sustainable.

Overall score: _____ / 20

Practice	Data source	1	2	3	4
ROLES AND ASSIGNMENTS: Organize roles and assignments to maximize collective expertise for student and teacher learning					
Assign most expert teachers to highest priority areas	Teacher inventory	Less than half of teachers in high priority areas are Effective (E) or Highly Effective (HE)	Between one half and two thirds of teachers in high priority areas are E/HE	More than two thirds of teachers in highest priority areas are E/HE and all teams in high priority areas are at least two thirds E/HE	All teachers in highest priority areas are E/HE and most HE teachers are teaching in high priority positions
Assign teachers to differentiated roles to extend the reach of highly effective teachers	Teacher inventory	Teacher roles are not differentiated. All teachers have similar responsibilities	Teacher roles are informally differentiated to extend the reach of expert teachers across their peers or to more students	A few differentiated roles exist to extend the reach of expert teachers to peers or more students, but available roles do not fully leverage expertise; roles include different position descriptions, selection processes, and accountability systems	A sufficient number of differentiated roles exist to extend the reach of expert teachers to peers or more students; roles include different position descriptions, selection processes, and accountability systems
Assign struggling teachers to differentiated roles to reduce their responsibility/reach and support their development	Teacher Inventory	The most expert teachers are *equally or less likely* than the least expert teachers to be in the challenging assignments	Teacher roles are informally differentiated to support the development and reduce the responsibility/reach of struggling teachers	A few differentiated roles exist to support the development and reduce the responsibility/reach of struggling teachers; roles include different position descriptions, selection processes, and accountability systems.	A sufficient number of differentiated roles exist to support the development and reduce the responsibility/reach of struggling teachers; roles include different position descriptions, selection processes, and accountability systems

| Design teacher roles to deliberately focus teacher time on instructional vs. non-instructional tasks (e.g. lunch duty) | Teacher Time | Less than 70% of teacher time in the average week is spent on the instructional cycle | 70-80% of teacher time in the average week is spent on the instructional cycle | 80-85% of teacher time in the average week is spent on the instructional cycle | At least 85% of teacher time in the average week is spent on the instructional cycle - planning for instruction, instructing students, or assessing learning |

Overall score:_____/16

Practice	Data source	1	2	3	4
TEACHING TEAMS: Create and support highly effective teaching teams					
Assemble teams of teachers who share learning goals to include needed combinations of knowledge and expertise	Teacher inventory	Expertise is very low or clustered in certain subjects and grades rather than balanced across teams (less than half of teams in high priority areas have an HE teacher AND a combination of strengths)	Between one half and two thirds of teams in high priority areas have at least 1 HE teacher AND a combination of strengths	More than two thirds of teams in high priority areas have at least 1 HE teacher AND a combination of strengths	Expertise is balanced across teams (more than 90% of teams have at least 1 HE teacher) and strengths of teams are balanced (i.e. teachers who are good at planning are spread across teams)
Ensure instructional expert (teacher leader, administrator, instructional coach) assigned to plan and facilitate Collaborative Planning Time (CPT) with accountability for improving collective performance	N/A	Few or no teams have access to an instructional expert during collaborative time	Instructional expert is present periodically to monitor/advise teams	An instructional expert is present for every team meeting, but leadership role is less formalized	Every team is led by an instructional expert with a formally designated team leadership role including accountability for improving collective performance
Schedule at least 90 minutes of collaborative planning time per week for teaching teams that share learning goals (e.g. 6th grade math team)	Other	Teams who share learning goals meet for between 0 and 45 minutes per week	Teams who share learning goals meet for between 45 and 89 minutes per week	Core teachers who share learning goals meet for at least 90 minutes per week, but special education, ELL and/or other relevant instructional support staff are not consistently integrated into time	Teachers who share learning goals (including core teachers, special education and ELL teachers) meet for at least 90 minutes per week

	N/A	Instructional expert has the length of the meeting time or less to plan for team collaborative meetings	Instructional expert has at least the length of the meeting time to plan for team collaborative meetings but insufficient tools/support to organize student data and material for discussion in team meetings	Instructional expert has between one and two times the meeting time to plan for team collaborative meetings and tools/support to organize student data and material for discussion in team meetings	Instructional expert has at least twice the meeting time to plan for team collaborative meetings and tools/support to organize student data and material for discussion in team meetings (may be achieved through release time or stipends for additional time)
Provide instructional experts with sufficient time and support to organize student data and material to guide discussions					
Teams have protocols and processes they follow to organize time and accountability for using the time well	N/A	No protocols or process are followed by teams – team use of time varies significantly from meeting to meeting and across teams	Some teams create and follow specific protocols and processes others don't	All teams have protocols and processes to organize CPT, but lack strong accountability for using the time well, and implementation varies	All teams have protocols and processes to organize CPT and accountability for using the time well

Overall score:_____/20

Practice	Data source	1	2	3	4
INDIVIDUAL PROFESSIONAL GROWTH: Grow individual teachers through supports, interventions and tools					
New and struggling teachers are provided with deep and ongoing targeted support	N/A	Most new and struggling teachers do not receive targeted support from rigorously selected school-based experts	New and struggling teachers receive support from rigorously selected school-based experts, but support is episodic vs. ongoing and/or not targeted to their unique areas of weakness	Most new and struggling teachers receive effective targeted and ongoing support from rigorously selected school-based experts based on their unique areas of weakness	All new and struggling teachers receive effective targeted and ongoing support from rigorously selected school-based experts based on their unique areas of weakness
Teachers have individual professional growth plans that identify current development areas and are regularly updated based on valid performance information; teachers receive support tailored to their needs based on the plan	N/A	Few formal systems and supports exist for individualized professional development	Individualized plans exist but often do not identify the most important development needs based on valid performance data; professional growth resources often lack coherence with plan and/or effectiveness	Individualized plans exist and are based on valid performance data, professional growth resources sometimes lack coherence with plan and/or effectiveness	Individualized plans exist and are based on valid performance data; coherent and effective professional growth resources are identified to support development areas; teacher progress is monitored and plans are updated regularly as teachers master skills
Teachers have individual professional growth plans that identify current development areas and are regularly updated based on valid performance information; teachers receive support tailored to their needs based on the plan	N/A	Few formal systems and supports exist for individualized professional development	Individualized plans exist but often do not identify the most important development needs based on valid performance data; professional growth resources often lack coherence with plan and/or effectiveness	Individualized plans exist and are based on valid performance data, professional growth resources sometimes lack coherence with plan and/or effectiveness	Individualized plans exist and are based on valid performance data; coherent and effective professional growth resources are identified to support development areas; progress is monitored and plans are updated regularly as teachers master skills

Teachers have easy access to curriculum and assessment tools that are aligned with rigorous learning standards and include high quality content, corresponding lesson plans, and frequent assessments	N/A	Does not exist	Exists in at least ELA and math, but is not used optimally by all teachers	Exists for ELA and math and is appropriately used by all ELA and math teachers	Exists for all core subjects and grades and is appropriately used by all teachers (expert teachers may use tools as a foundation and adapt; novice likely to use with little adaptation)

Overall score:_____/16

Practice	Data source	1	2	3	4
TARGETED AND FLEXIBLE STUDENT AND TEACHER GROUPINGS: Prioritize class sizes and teacher loads and implement systems for ongoing adjustment of talent and technology					
Class sizes are reduced in high priority areas (priority subjects, for struggling students, in early and transition grades)	Class Size Matrix (with questioning to get at which students get smaller group sizes)	Class sizes in high priority areas are higher than average class size	Class sizes in high priority areas are insignificantly smaller or the same as average class size	Class sizes in some high priority areas are meaningfully smaller than average class size	Class sizes in most or all high priority areas are meaningfully smaller than average
Class sizes in lower-priority areas are higher to better target resources to higher priorities	Class Size Matrix	On average, class sizes in lower-priority areas are smaller than average class size	On average, class sizes in lower-priority areas are about equal to average class size	On average, class sizes in lower-priority areas are higher by between 1 and 4 students than average class size	On average, class sizes in lower-priority areas are significantly higher (by >=4 students) than average class size
In high priority areas, teams of teachers frequently change student groupings to match group size to student need	N/A	Student groups change infrequently or not at all based on student learning needs	Some individual teachers create flexible student groups within their own classrooms	Some teams of teachers create flexible student groups that change regularly based on student learning needs	All teams create flexible student groups that change regularly based on student learning needs (e.g. skill level, lesson type)
In high priority areas, student and teacher groupings change frequently to match instructional expertise (teacher expertise and/or technology) to student need	N/A	Opportunities to use flexible grouping to match instructional expertise to need exist, but the highest need students are often matched with the least expert staff	Few opportunities exist to use flexible grouping to match instructional expertise to need; students tend to be with one teacher all the time	Some teams of teachers create flexible student groups that change regularly and deliberately match instructional expertise to student need	All teams create flexible student groups that change regularly and deliberately match instructional expertise to student need

Special education and ELL services are integrated into the school's skill-based grouping strategy and align seamlessly with core instruction	N/A	Specialized services are isolated from core instruction and the school's skill-based grouping strategy	Specialized services are delivered mostly through pull-out; deliberate communication between specialized and classroom teachers ensures alignment of services with core instruction	An inclusion model is utilized where appropriate based on student needs; special education teacher provides services to special education students only and is not fully integrated into the school's skill-based grouping strategy	An inclusion model is utilized where appropriate based on student needs; model is a fully integrated part of the school's overall skill-based grouping strategy

Overall score:_____/20

Practice	Data source	1	2	3	4
PERSONAL RELATIONSHIPS: Organize structures to ensure that students are known by their teachers and within the broader school community					
Expectations for behavior and consistent routines promote positive school-wide culture	N/A	Isolated systems exist within individual classrooms	No school-wide systems, some teacher teams have implemented common systems	School-wide common systems in place, with less consistent implementation and adults often not fully accountable for implementation	School-wide common systems in place and consistently implemented; adults accountable for implementation
Structures exist to ensure students feel connected to their school and learning community	N/A	Structures do not exist	Structures exist, but have had little impact on students' connection to their school	Structures exist, and informally have increased students' connection to the school, though structures are not used in deliberate ways for this purpose	Structures exist (such as smaller learning communities) and are used deliberately and well to support student connection to the school

Overall score:_____/8

Practice	Data source	1	2	3	4
TARGETED SOCIAL EMOTIONAL SUPPORT: Provide targeted social and emotional services where necessary					
Teachers integrate Tier I social/emotional and behavioral supports into the regular classroom environment	N/A	Students without intensive social emotional needs are often sent out of the classroom for intervention because classrooms are ill-equipped to support Tier 1 needs	Few teachers integrate Tier I social/emotional and behavioral supports into the regular classroom environment and are inconsistently held accountable for this practice	Most teachers integrate Tier I social/emotional and behavioral supports into the regular classroom environment and are inconsistently held accountable for this practice	All teachers integrate Tier I social/emotional and behavioral supports into the regular classroom environment and are held accountable for this practice
Systems for identification and triage of Tier 2 and 3 are in place, and link students to outside providers where necessary; feedback loop exists between classroom teachers and intensive support services	N/A	Tier 2 and Tier 3 social and emotional support services fall significantly short of student need	Tier 2 and 3 services exist to partially serve the spectrum of student need, with more limited linkages with outside partners	Tier 2 and 3 services exist to serve the full spectrum of student need, leveraging outside partners to provide higher quality and more specialized services where necessary; feedback loop is limited between services and classroom teachers	Tier 2 and 3 services exist to serve the full spectrum of student need, leveraging outside partners to provide higher quality and more specialized services where necessary; feedback loop between services and classroom teachers

Overall score:_____/8

Practice	Data source	1	2	3	4
STRATEGIC SCHEDULING: Match schedule to instructional and student needs					
Passing time, lunch time, and other maintenance time is minimized to maximize the percent of the student day available for instruction	Bell Schedule	<70% of the student day is spent on instruction vs. maintenance	70-75% of the student day is spent on instruction vs. maintenance	75-80% of the student day is spent on instruction vs. maintenance	80% or more of the student day is spent on instruction vs. maintenance
Allocation of instructional time reflects prioritization of core academics and highest priority areas	Bell Schedule	The typical student spends <65% of his/her instructional time on core academics	The typical student spends 65-75% of his/her instructional time on core academics; time may or may not be greater in highest priority areas	The typical student spends 70-75% of his/her instructional time on core academics; within core, greater time is spent on highest priority areas	The typical student spends >= 75% of his/her instructional time on core academics; within core, greater time is spent on highest priority areas
Students spend additional time in subjects in which they are struggling	Bell Schedule	No opportunities for struggling students to spend additional time in subject areas in which they are struggling	Struggling students spend 1.5-2X more time than the typical student in subject areas in which they are struggling less than half the time (often because opportunities for additional time are limited to just one subject or a small subset of struggling students)	The majority of struggling students spend 1.5-2X more time than the typical student in subject areas in which they are struggling (emphasis on ELA and math)	All struggling students spend 1.5-2X more time than the typical student in subject areas in which they are struggling (emphasis on ELA and math)

Overall score:_____/12

Practice	Data source	1	2	3	4
VARYING TIME ONGOING: Implement systems for ongoing adjustment of time and instructional programs					
Scheduling structures are flexible and frequent changes in instructional time and program are made based on student progress	N/A	Structures do not exist for real-time adjustment of time and instructional program; adjustments are made only at the end of each year	Time and instructional program within core are adjusted infrequently based on student progress	At least 4X per year, time and instructional program within core are adjusted based on student progress	Time and instructional program within core vary frequently based on student progress, enabled through structures such as intervention blocks, mastery-based unit progression, etc.

Overall score:_____/4

Practice	Data source	1	2	3	4
SUFFICIENT TIME: Ensure sufficient total time for students to meet rigorous learning standards while also engaging in enrichment opportunities beyond core					
Sufficient time exists within the master schedule for successful implementation of school's instructional model and engagement outside of core to address broader learning and social emotional goals	Bell Schedule	There is not enough time in the day to implement the instructional program in all core subjects and allow time for enrichment and physical activity consistent with their needs	For a minority of students, enough time exists to implement the instructional program in all core subjects and allow time for enrichment and physical activity consistent with their needs	For most, but not all students, enough time exists to implement the instructional program in all core subjects and allow time for enrichment and physical activity consistent with their needs	Enough time exists to implement the instructional program in all core subjects and allow all students time for enrichment and physical activity consistent with their needs
Sufficient time exists for struggling students to catch up	Bell Schedule	Struggling students have fewer hours in school annually than the national average	Struggling students spend between 0 and 100 hours more time in school annually than the national average	Struggling students spend between 100 and 300 hours more time in school annually than the national average	Struggling students have at least 300 hours more time in school annually than the national average

Overall score:_____/8

Practice	Data source	1	2	3	4
NON-INSTRUCTIONAL ROLES: Organize a combined set of jobs and partnerships to maximize resources that support teaching and learning					
Prioritize investment to classroom instruction	Staffing Plan and Budget	Spending on instructional personnel is <60% of total school personnel spending	Spending on instructional personnel is 60%-70% of total school personnel spending	Spending on instructional personnel is 70%-75% of total school personnel spending	Spending on instructional personnel is >75% of total school personnel spending
Deliberately use creative staffing arrangements such as part-time staff to ensure services are provided at the lowest possible cost	Staffing Plan and Budget	Staffing is traditional	School has not deliberately designed creative staffing arrangements, though in a few areas they may have evolved naturally	School has deliberately designed creative staffing arrangements in one or more areas, but significant opportunities in other areas remain unexplored	School has deliberately designed creative staffing arrangements in multiple areas to maximize use of resources
Partner with outside resources where they can provide lower cost and higher quality services	Staffing Plan and Budget	Partners are not used, or they provide services that are lower quality than what the school could provide	In areas where partners are used, they provide services that are higher cost than what the school could provide, and there is no plan to build school capacity in this area in the long-term and transition away from the partner	Partnerships exist in *some areas* where outside resources that can provide *higher quality* services are available; if services are not *lower cost* than the school could provide, there is a plan to build school capacity in this area in the long-term and transition away from the partner	Partnerships exist in *most or all areas* where outside resources that can *higher quality* services are available; if services are not *lower cost* than the school could provide, there is a plan to build school capacity in this area in the long-term and transition away from the partner

Overall score:_____/12

Practice	Data source	1	2	3	4
PAYING THE MARKET RATE: Match compensation levels to job responsibilities					
Non-instructional duties are performed by lower-paid staff	Staffing Plan and Budget	The average hourly rate for duties is over 70% of the average teacher hourly rate of pay	The average hourly rate for duties is 60%-70% of the average teacher hourly rate of pay	The average hourly rate for duties is 50%-60% of the average teacher hourly rate of pay	The average hourly rate for duties is not more than 50% of the average teacher hourly rate of pay
Ensure compensation levels for non-instructional staff do not exceed the market rates for their skills/expertise in other sectors	N/A	Compensation levels for many non-instructional staff are over 20% above the market rate in other sectors	Compensation levels for many non-instructional staff are somewhat above the market rate in other sectors	Compensation levels for some non-instructional staff are above the market rate in other sectors	Compensation levels for non-instructional staff are not above the market rate in other sectors

Overall score:_____/8