Using the Talent Decision Planner (TDP)

The Facilitator’s Guide
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Strategic Talent Management by Design, Not Default

Introduction

Leading schools and districts are transforming the ways they attract, develop, and retain great teachers and leaders. They recognize that principals play a crucial role as managers of the teacher talent within their buildings, yet they need central office support for this role. Such districts know that instructional leadership is not just about measuring teacher effectiveness through observations and feedback, but also planning for professional learning, creating differentiated roles on the teacher career ladder, retaining effective teachers, and more. Such districts help principals use data more strategically to answer key questions about the workforce, instead of prioritizing compliance and control. Many call this Strategic Human Capital Management or Strategic Talent Management. Yet ensuring the coherence and direction of this transformation across the district is a multifaceted challenge. Education Resource Strategies created the Talent Decision Planner (TDP) tool to help.

Built from more than a decade of working closely with districts and with input from many leading voices in the field of human capital management, the TDP helps districts create coherence within the many parts of their human capital strategy and empowers school leaders to make strategic talent decisions with clarity and purpose.

The interactive Excel tool helps central office leaders identify the key teacher-related decisions (for example, around hiring, job and team assignment, career path, and more), delegate roles for those decisions, create timelines for decision-making, and identify the most relevant data to inform those decisions. It then creates tools to distribute to principals, like calendars, decision lists, and support packets.

This guide will help a project manager (facilitator) work with a team of stakeholders to use the tool. By clarifying and supporting decision-making, the TDP provides a kind of scaffolding to ensure strong talent managers.
The Talent Decision Planner (TDP)

The TDP aims to transform how your district manages and supports decision-making around teacher talent in two ways:

1) **Clarifies decision-making roles:** The TDP helps district leaders to clearly delegate decision-making responsibilities across a district, from the central office to principal supervisors, school-level leaders and even teachers. It allows districts to identify what key decisions should get made, who makes them, and when. Instead of defining these decisions from scratch, districts are presented with a comprehensive set of decisions and guiding questions that ERS has collected from the best-practices research and review by leaders in the field. Districts can then customize this initial framework to their particular context, constraints, and priorities. The TDP creates up to three different types of outputs that the district can distribute to various talent decision makers: Decision calendars, Decision and Guiding Questions Lists, and Monthly Decision Support Packets containing links to additional district resources and research into what works best in managing teacher talent.

2) **Improves data-informed decision-making:** The TDP helps districts prioritize what data and metrics will best support the above decisions, identify gaps in their current data systems, and make a plan to improve their systems and distribute key data. It provides leaders with a road map for how teacher effectiveness and student performance data can inform decisions.

The TDP is comprehensive, containing nearly 100 decisions and 300 guiding questions—but districts should start small, customize liberally, and use the tool’s many features over time. One district may start by clarifying the decisions and timelines for principals when doing job and team assignment; another may focus on a plan to clean up its data systems to support effective professional development planning. If a district’s data systems are nascent or in disarray, the TDP is a powerful tool to prioritize which data elements to focus on first. Or, if a district feels like it’s drowning in data, the TDP can help clarify what the data can be used for. The TDP helps districts plan more effectively and disseminate information more easily—it’s not a new program or initiative to learn.

The Components of Strategic Talent Management Decision-Making

Great schools and districts ensure that every talent management decision is aligned with the school system’s overall priorities and goals. Effective Talent Managers therefore approach all of these decisions deliberately with the end in mind. The district can facilitate the process by clarifying:

- **WHAT** decisions need to be made
- **WHO** makes them
- **WHEN** to make them, and
- **HOW** to make them strategically with the right questions and data
**WHAT Decisions?**

One of the hardest steps is knowing what the most important talent management decisions are. Many districts have a sense, but don’t have the capacity to do thorough research and compare to peer districts. ERS mined our experience working with districts around the country, surveyed the research on talent management, and sought feedback from teachers, principals, principal supervisors, central office staff, and peer organizations who work on human capital issues. We came up with a framework based around six talent areas:

<table>
<thead>
<tr>
<th>Talent Area</th>
<th>Decisions related to:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hiring</td>
<td>• Hiring Needs&lt;br&gt;• Hiring Process&lt;br&gt;• Recruitment&lt;br&gt;• Selection</td>
</tr>
<tr>
<td>Job and team assignment</td>
<td>• Certifications&lt;br&gt;• Departmentalizing&lt;br&gt;• Distribution of Teachers&lt;br&gt;• Excessed Teachers&lt;br&gt;• Job Assignments&lt;br&gt;• Teacher Teams</td>
</tr>
<tr>
<td>Measuring teacher effectiveness</td>
<td>• Evaluation Load&lt;br&gt;• Evaluation Practices&lt;br&gt;• Evaluation Training</td>
</tr>
<tr>
<td>Professional growth and support</td>
<td>• Best Practices&lt;br&gt;• Collaborative Planning Time&lt;br&gt;• Professional Development Plans (Individual, Team, School)&lt;br&gt;• Instructional Leadership&lt;br&gt;• Professional Development Resources&lt;br&gt;• Struggling Teachers</td>
</tr>
<tr>
<td>Career path</td>
<td>• Career Goals&lt;br&gt;• Teacher Leader Selection&lt;br&gt;• Tenure&lt;br&gt;• Ineffective Teachers</td>
</tr>
<tr>
<td>Value proposition and retention</td>
<td>• Benefits&lt;br&gt;• Career Ladder&lt;br&gt;• Salary&lt;br&gt;• Teacher Recognition&lt;br&gt;• High-Performer Retention&lt;br&gt;• Working Conditions</td>
</tr>
</tbody>
</table>
**WHO makes them?**

Effective talent managers are clear on which decisions they are responsible for and feel empowered to make decisions.

The TDP divides decisions among four decision-maker roles:

<table>
<thead>
<tr>
<th>Teachers/Teacher Leaders</th>
<th>Principals</th>
<th>Principal Supervisor</th>
<th>Central Office</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any teacher with a leadership role within the school.</td>
<td>Principals are the primary school-level leaders. However, we expect that principals also collaborate with and delegate to other school-level leaders, such as assistant principals, guidance counselors, or instructional coaches.</td>
<td>Principal supervisors include anyone whose primary job is school supervision. The TDP focuses on how principal supervisors can better coach and guide principals—not monitor compliance.</td>
<td>Key departments include human resources, academics, school support, or data, but could include anyone at the central office except for principal supervisors.</td>
</tr>
</tbody>
</table>

To see how each of the decision buckets applies to each decision-maker, see the ERS Talent Decision Framework in the Appendix on p. 22.

**WHEN do the decisions have to be made?**

With so many time-sensitive decisions to be made, it is extremely important to provide talent managers guidance on timing and sequencing. The TDP can provide each decision maker with a customized calendar.
**HOW are the decisions made strategically— with purpose and clarity?**

Making good decisions requires knowing what questions to ask and having the information to answer those questions accurately. The TDP includes guiding questions that break down big decisions into smaller pieces, and gives the central office the option to provide additional support like links to published research or district resources. The tool also guides the district to prioritize what data will best support each question, with a focus on what is impactful, available, and reliable. This means that principals and others won’t “drown” in too much data or think only about “compliance,” but can use data to answer key questions to inform strategic decisions.

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**Decisions and Guiding Questions: Principal**

**Hiring**

1. Recruitment: Source candidates. Target candidates to interview that are likely to succeed in my school and in the district.
   - A. What candidates meet the requirements for the positions that we have posted?
   - B. What pipeline programs, universities, recruiting channels, or other schools have produced candidates who thrive in our district?
   - C. Which candidate characteristics have been most predictive of success in the district?

2. Selection: Make offers. Select candidates based on the skills, credentials and traits that best fit my school’s needs.
   - A. Which new hires over the past five years have proven to be most and least effective? What type of teacher tends to be more/less successful in our school’s culture?
   - B. How do candidates rate on a rubric that is aligned to our Instructional Framework?
   - C. How do candidates align to our school needs identified by our Needs Assessment?
   - D. For internal transfer candidates, what was their performance at their prior school?

   - A. In recent years, how has the effectiveness of my new hires been compared to the average effectiveness of new hires across the district, and in other schools like mine?
   - B. When are my hires being made? How does the effectiveness of new hires vary by the month in which they received their offer, both for my school and the district as a whole?
   - C. Is my interview process rigorous, including lesson demonstrations, reference checks, and assessment?
Using the Talent Decision Planner (TDP)

The TDP guides district leaders through this process of identifying the what, who, when, and how. The first step is to appoint a project manager—for example, someone akin to a chief of staff in the human resources department. The project manager will manage the project with the guidance and approval of key district leaders—including the chief talent officer, chief academic officer, and/or the chief of schools—and work with a team of stakeholders throughout the process. The project manager can complete a number of tasks that do not require the attention of the entire team and delegate tasks to team members.

<table>
<thead>
<tr>
<th>Suggested Action</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preview ERS Sample Decision Guides</td>
<td>• Download the ERS Sample Decision Guides from <a href="https://www.erstrategies.org/library/TDP_toolkit">https://www.erstrategies.org/library/TDP_toolkit</a>&lt;br&gt;• Distribute to anyone involved in setting the scope of this project&lt;br&gt;• Learn more about talent management content and to get inspired for what you can create with the TDP&lt;br&gt;• Also refer to the ERS Talent Framework on p. 22 of this Guide for the “big picture”</td>
</tr>
<tr>
<td>Select Talent Areas and Decision-Makers of Focus</td>
<td>• Select the talent management areas (hiring, job and team assignment, measuring teacher effectiveness, professional growth and support, career path, and value proposition) to focus on in your first cycle of using the TDP. You can change your selection at any time.&lt;br&gt;• Select the decision maker types (teacher, principal, principal supervisor, and central office) to focus on in your first cycle of using the TDP.</td>
</tr>
</tbody>
</table>
Preview Decision Guides

Begin using the TDP with a meeting of the district leadership to determine the scope of its use in the first annual cycle. We suggest holding a meeting with the chief talent officer, chief academic officer, and chief of schools or making it a line item in a cabinet meeting. To get a sense of what the TDP can be used for, we suggest the group previews the ERS Sample Decision Guides (Available as a separate Excel document from the TDP tool). There are three types of Decision Guides, and one version of each Guide for each of the decision-makers (central office, principal supervisors, principals, and teachers):

- **The Decisions Calendar**: The Decisions Calendar shows the types of decisions that each decision-maker should tackle, laid out by month. Underneath the calendar is full text of each decision. The central office could send out these calendars once a year to help talent managers plan ahead and tackle issues early.

- **Decisions & Guiding Questions List**: The Decisions & Guiding Questions List shows all the decisions each decision-maker should make over the year, along with guiding questions that break the decision down in manageable chunks. These guiding questions provide true clarity and help both new and experienced principals focus on the most relevant data and personal experience needed to make a strategic decision.

- **Monthly Decision Support Packets**: The Monthly Decision Support Packets show decisions and guiding questions by month, and contain “additional support”: background information on the topic, strategies to consider, and links to other resources like district templates or published research. The central office could send these out monthly, and pair them with data reports that are tied to specific guiding questions.

It should be clear that these Decision Guides are aides to support talent managers—not a way to mandate actions. They serve as a common language and agenda for coaching conversations between principals and supervisors, act as reminders of over-looked or unknown decisions, and make data more meaningful.

Reading these Guides is also a good way to get a feel for the content in the tool—understanding what falls under each of the six Talent Areas, what kinds of decisions principal supervisors have relative to principals, etc. You can also see a summary of all of the decisions, mapped to the four decision-makers, in the Appendix of this Facilitator’s Guide on p. 22.

As you read these Decision Guides, you will likely notice many ways they deviate from your district context—for example, maybe you call principal supervisors “Instructional Leadership Directors”, or teachers already have an expanded role in helping to select new hires, or your district does not have tenure at all. That is what the TDP is for—to allow your district to customize the content in these Decision Guides to your own context, priorities, and barriers, and to guide your district in identifying the data that will support all levels of decision-making.
Select Scope—Talent Decision Areas and Decision-Makers

The team will also likely feel overwhelmed by the number of decisions and questions contained in the ERS Sample Decision Guides. The content was carefully curated based on ERS’ experience working with dozens of districts over ten years; best-practice literature in human capital management; and feedback from teachers, principals, principal supervisors, central office staff, and peer organizations. However, few districts will want to start with the entire “map”. The TDP allows each district to focus on only the topics and decision-makers that are a priority, and then address all areas of talent management over time.

So the next step is to determine the scope—what talent areas you want to focus on, and which decision-makers. The scope should align with the priorities in your overall talent management strategy. For example—if it is a district priority to improve strategic hiring, you may want to start with that talent area. If it is a district priority to clarify and improve the role of principal supervisors, you may want to start there.

If you are not sure how your talent management strategy aligns with the TDP, you can use ERS’ quick diagnostic tool, Resource Check, to identify some places to start: (See the Teaching-specific version of Resource Check at http://www.erstrategies.org/assessments/teaching).

After the team has discussed and decided on the scope, the project manager should record the choices in the checkbox matrix on the TDP homepage. You can change your selection at any time.

FIGURE 1. THE HOME PAGE

<table>
<thead>
<tr>
<th>Talent Areas</th>
<th>Decision Makers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hiring</td>
<td>Teacher ✓  Principal ✓  Supervisor ✓  Central Office ✓</td>
</tr>
<tr>
<td>Job &amp; Team Assignment</td>
<td>✓</td>
</tr>
<tr>
<td>Measuring Teacher Effectiveness</td>
<td>✓  ✓  ✓  ✓</td>
</tr>
<tr>
<td>Professional Growth &amp; Support</td>
<td>✓  ✓  ✓  ✓</td>
</tr>
<tr>
<td>Career Path</td>
<td>✓</td>
</tr>
<tr>
<td>Value Proposition</td>
<td>✓</td>
</tr>
</tbody>
</table>
Part 1: Map Your Talent Decisions and Questions

<table>
<thead>
<tr>
<th>Suggested Action</th>
<th>Purpose</th>
</tr>
</thead>
</table>
| Choose Decision Guides to customize | • Consider which Decision Guides would be most helpful for your talent managers now.  
• Mark your selection on the homepage of the TDP tool  
• You can create all of them as a test run, and change your selection at any time |
| Project manager makes initial customizations | • Project manager clicks “Customize TDP content” or creates/prints worksheets  
• Project manager makes “obvious” changes such as naming conventions, and flags certain decisions for team discussion |
| Stakeholders discuss and map decisions, roles, calendar, and/or guiding questions | • Stakeholders meet (probably several times) to discuss the content. The participants may vary based on the topics covered in each meeting. |

**Process Point: the Role of the Project Manager vs the Team**

At this point, the project manager may want to assemble that team of stakeholders mentioned above. This group may still include the chief talent officer, or simply report back to him or her; it should almost certainly include representatives from talent, academics, and/or school support as well as principal supervisors, principals, and teachers. Participants may vary over time, but having a broad range of stakeholders involved in this process will lead to better-customized content and help ensure buy-in across the district.

The project manager will prepare materials, make some initial choices on his/her own, and own updating of the TDP Excel tool. The team of stakeholders will likely participate through a series of customization meetings. The challenge is balancing efficiency with bringing sufficient voices and perspectives to the process.

**Choose Talent Decision Guides to customize**

The project manager should share the ERS Sample Decision Guides with the team of stakeholders and either together or separately decide which Talent Decision Guides you want to create in this first cycle of use. You can choose to create all three to test how they would look, and you can change your selection at any time. The project manager should note the selection in the checkbox matrix on the homepage of the TDP.

![Checkbox Matrix](image)
NOTE: Though the TDP does create concrete guidance you can hand to principals, the value is not only in creating the calendars, lists, and support packets—it is in the conversations within the stakeholder group about what talent management should look like in the district. We hope that reviewing ERS’ curated content sparks fruitful and sometimes long-hidden conversations about who should serve what roles, and what really strategic talent management is.

Step 1: Customize Decisions

To begin customizing the ERS content for your district, there are two options: Customize directly within the Excel tool (the green button), or print worksheets to mark up or distribute to team members (the blue buttons). If you choose the worksheets, you will have to later input your customizations into the Excel tool.

We suggest that the project manager do a “first-pass” through the material to make obvious changes, such as adding district-specific names for roles and procedures, and to eliminate any decisions that are definitely not applicable. He or she will mark which decisions should be discussed by the team of stakeholders. We suggest that teams address no more than two talent areas per two hour meeting.

- **Keep** is the default option for all decisions.
- **Delete** a decision entirely from your framework. Use this function for decisions that will never be relevant or realistic in your district’s context. For example, if your district does not have tenure available for teachers, you may want to remove all tenure-related decisions.
- **Defer for Now** will hide this decision from Decision Guides you create, but will leave the decision in your framework, so you can include it at a later date. Click the “Show Deferred” button on the left-hand side of the customization page to see deferred decisions.
- **Reassign** a decision to a different decision maker.
- **Edit** the text of a decision to align with district language.
- **Add** new decisions to the TDP to reflect your district’s initiatives.

HELPFUL HINTS

- The project manager can write “REVISIT” in the description of any decision he or she wants to review with the group.
- In the kickoff meeting, be sure to review who should be assigned to each decision, to create a clear picture of roles.
- Feel free to liberally edit decision text to reflect your district’s context and norms.
- When you add decisions, make sure to phrase them as action items. If they are questions to be answered, those go in the Guiding Questions step, and should support a particular decision.
- You may want to add specific names or departments to the decision text to clearly delegate responsibility for central office decisions.
FIGURE 2. CUSTOMIZE DECISIONS

[Diagram showing a process for customizing decisions with steps and options for principals and central offices.]
Step 2: Customize the Calendar

Once you have your list of decisions, you can tailor the calendar of decisions for the year, customizing start and end dates and the way that decisions appear on the calendar. To customize the calendar:

- **Select calendar-start month**  This allows you to change the month in which your calendar begins, depending on what you want to consider the start of your annual decisions process.

- **Change start and end month**  Each decision in the TDP has already been assigned a default start and end month. Districts can modify these dates based on district-specific needs and/or data release schedules.

- **Change decision shorthand**  The decision shorthand is the shorter version of each decision that will appear in calendar outputs. Districts can substitute this text with district-specific language.

Once the calendar is customized, districts can either choose to move on to Customizing Questions or return to the Homepage to create the updated Decision Calendar Decision Guide.

FIGURE 3. CALENDAR CUSTOMIZATION

HELPFUL HINTS

- When choosing start and end months, consider when data becomes available: at a specific point or throughout the year. This will affect whether decisions are made once or revisited throughout the year.

- Consider these key benchmarks, drawn from ERS’ experience and from research literature:
  - **Fall**: Review staffing and the teacher “value proposition.” Begin retention conversations.
  - **Winter**: Project vacancies. Consider budget and staffing needs for the coming year. Continue retention conversations.
  - **Spring**: Revise staffing needs. Begin recruitment and selection. Begin to consider tenure decisions. Finalize evaluations, teacher assignments for the upcoming year, and PD plans.
  - **Summer**: Finalize staffing. Complete induction, onboarding, and evaluation planning.
Step 3: Customize the Guiding Questions

Once you and your team have customized your decisions, you can customize your guiding questions. In the TDP, each decision is supported by one or more guiding questions. These break the decision down into smaller chunks, push people’s thinking beyond compliance toward what is truly strategic, and direct the talent manager to specific data or anecdotal evidence (Such as conversations with teachers, observations, etc). As in Step 1, you can take the following actions with respect to Guiding Questions:

- **Keep** the default option for all questions.
- **Delete** a question entirely from your framework. Use this function for questions that will never be relevant or realistic in your district’s context. If a decision has already been deleted, all the questions that went with it will have been deleted too.
- **Defer for Now** will hide this question from any Decision Guides you create, but will leave the question in your framework so you can include it at a later date. Click the “Show Deferred” button on the left-hand side of the customization page to see deferred decisions and questions.
- **Edit** the text of a question to align with district-specific language.
- **Add questions** to inform each decision.

HELPFUL HINTS

- Feel free to revise guiding question to incorporate district-specific language, terms, and initiatives. This engages users and it allows the TDP to work alongside, rather than in addition to, other district initiatives.
- When you add a question, be sure it’s not really a decision in disguise. Decisions are tied to action; questions can usually be answered with data or experience but might not be the whole story.
FIGURE 4. GUIDING QUESTIONS CUSTOMIZATION

Talent Area:

**PRINCIPAL**
   - A. Do my and my evaluators’ observation ratings align with other effectiveness measures, such as student outcomes or student/parent survey results?
   - B. How does my evaluation rating distribution compare to the district average and to comparable schools (in aggregate). Does the story it paints about teacher effectiveness at my school resonate with me?
   - C. Do my evaluation scores line up with the expectations of what effective instruction looks like in my context?

2. Evaluation Practices: Additional training or additional resources needed for me and my team to effectively carry out this role?

**CENTRAL OFFICE**
1. Evaluation Practices: Additional training or additional resources needed.
2. Evaluation Practices: Prioritize rubric skills. Determine which parts of the evaluation rubric I should receive extra attention from evaluators.
**Step 4: Customize Additional Support**

If your team has chosen to create the Monthly Decision Support Packets, this part of the tool allows you to customize the “additional support” text attached to each question. In the TDP, some questions and decisions come pre-populated with “additional support” content, such as background information or links to research or other resources. Districts may want to add, delete, or revise this text to make the Monthly Decision Support Packets as action-able for talent managers as possible.

Examples include:

- Links/references to specific data that the talent manager will receive
- District-wide analyses of trends (e.g., Research into which teacher candidate characteristics appear to be most highly correlated with effective performance), or
- “Links/references to relevant district-created templates or protocols, such as protocols for using team time

**FIGURE 5. ADDITIONAL SUPPORT CUSTOMIZATION**

![Figure 5](image)

At this point, the district team should have a fully customized framework, with the decisions, questions, user assignments, and strategies tailored to the district’s unique context.
Create and Distribute Decision Guides

At any point in the customization process, the project manager can push the blue button that says “View/Print Decision Guides”, and the TDP will create new tabs with the Decision Guides you selected above. You can then export whichever tabs you want to a new document in order to share with principals and others. If you continue customizing, you can hit the button again to refresh the tabs. Remember that if you only want to see the calendar view, for example, you should only check “Calendar” in the checkbox matrix on the homepage.

Part 2: Use Your Talent Decision Map to Plan Data Views

Goals and Objectives

- Determine what data views you will create and when
- Create a “recipe” for each data view
- Create plan to strategically evolve data collection and validation systems

The premise behind Part 2 of the TDP is that, to strategically plan out what data views you create and distribute, and how those data views are organized, you should start with clarity around what the decisions are that different talent managers need to make as part of their job, and, for each such decision, what are the guiding questions they need to answer to make that decision well—i.e. the Talent Decision Map you created through Part 1. With this clarity, you can then figure out the metrics and data elements needed to optimally answer each question, and organize those metrics and data elements specifically to help the decision-maker answer that specific question, in order to inform the related decision. Through explicitly tying each data view to the question and decision it relates to, you mitigate the challenge of turning data into action for your various decision-makers.

Wherever you are in the process of supporting data-informed decision-making, starting with your Talent Decision Map can help you strategically workplan your continued evolution of your data reporting and collection systems. Tying each potential data view back to the question and decision it relates to enables you to more easily consider the impact each data view can have, and thus to prioritize which data views you focus on creating first. Additionally, by knowing the questions you could answer and decisions you could inform by collecting data elements you don’t currently have, you can strategically determine which data collection and validation gaps you address first.
**Process Overview**

<table>
<thead>
<tr>
<th>Step</th>
<th>Purpose</th>
<th>Recommended Decision Maker</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1: Assess Data View Impact</strong></td>
<td>Districts assign a priority categorization of low, medium, or high impact to each question (i.e. data view); among other things, this informs the phasing of data views in Step 4</td>
<td>Representative(s) of human capital leadership</td>
</tr>
<tr>
<td><strong>Step 2: Audit Data</strong></td>
<td>For all data elements needed to create the data views in the focus areas, the district identifies which elements they do and do not have, and which they have but are too unreliable to use in data views; among other things, this informs the phasing of data views in Step 4</td>
<td>Representative(s) of data/technology team</td>
</tr>
<tr>
<td><strong>Step 3: Define Data View Phases</strong></td>
<td>Create and name the list of phases into which data views will be placed in Step 4, based on the assumption that all data views won’t be rolled out to decision-makers at once</td>
<td>Collaboration between data/technology team and human capital strategy team</td>
</tr>
<tr>
<td><strong>Step 4: Schedule Data Views</strong></td>
<td>Based on the outputs of Steps 1 and 2, place each data view into one of the phases defined in Step 3</td>
<td>Led by human capital team, informed by data/technology team</td>
</tr>
</tbody>
</table>

Note that not every question in the framework appears in Part 2. Not every question in the decision framework is of a nature to be data-informed; those that are are the ones that appear in Part 2. Since there is a one-to-one relationship between questions and data views (since data views are constructed around specific questions), data views are defined in Part 2 by the questions they answer. You can change whether you consider a question to be one that can be data-informed by checking or unchecking the Data-Informed box in the Customize Questions dialogue box in Step 3 of Part 1. You can also change other data-related aspects of questions (i.e. the metrics that will answer the question, or the data elements needed to calculate the metric) by clicking the “Manage Data Links” button in that Customize Questions dialogue box.

To start executing the steps of Part 2, click on the blue “Plan Data Views” button within the Part 2 section of the Homepage of the TDP.

**Outputs**

After finishing Steps 1–4, you have two outputs at your disposal.

**Data View Planning Report:** This report lists the data views you’re planning to create, grouped by phase, and helps you plan for these data views by providing suggested elements of the “recipes” needed to create those data views. These “recipe” elements include the suggested metric(s) that ERS
thinks would optimally answer each question, and, where it is less intuitive, also providing the suggested methodology for calculating the metric(s). Also included is the list of suggested data elements needed to calculate the relevant metrics and create the data view. For selected data views, the TDP toolkit includes a sample data view that shows a recommended mockup of how to organize the metrics/data elements into a data view that answers the specific question at hand. For data views that have such mockups available, this report references the page number of the relevant mockup within the Sample Data Views PDF. All of this is not meant to leave you with complete technical specifications, but the combination of these elements is intended to be a helpful starting point for the “recipe” needed for the data/technology team responsible for actually creating the data views.

Data Gaps Report: This report helps you plan for how to strategically evolve your data collection and validation systems by first listing out all of the data elements that you don’t currently collect, and then listing all of the data elements that you have but which are unreliable, all based on what you enter in Step 2. Within each list, each data element is shown with the questions for which you could create data views if you had that data element, or if the data element were clean enough to reliably use. This report can help you prioritize which of these missing or unreliable data elements to collect or clean first, based on how many data views you could start to create, and on how much impact you think those data views would have (based on Step 1).

Step 1: Assess Data View Impact

This step allows your team to assess the level of impact each potential data view could have if it were available to answer a specific question. At this stage, you can assign each data view (i.e. question) either a “low,” “medium,” or “high” impact categorization, depending on how beneficial you think it will be for your district to create a data view to answer that question (to inform the related decision) and to distribute that data view to decision makers across your district. Each question that is native to the TDP tool (i.e. one that the district didn’t add) has a suggested priority level that is based on ERS’ experience in the field, which may or may not reflect the priorities in your district.

To think through the impact that any particular data view might have, think through the following two factors, as laid out by the diagram below: (1) how important you believe the related decision is for improving student outcomes in your district, and (2) the extent to which having the data view to answer the relevant question will help the decision maker actually make a better decision. The more both things are true, the more impact you in theory would get from having that data view.
**Step 2: Audit Data**

Besides determining the priority level of each question, the other input into Step 4 needs to be documentation of what data elements are available and ready for use. For every data element in the list, select whether it is Available and Reliable, Available but Unreliable, or Unavailable.

In this step, you can filter the data elements to only those needed for the data views that you are prioritizing. For example, if you want to focus only on high and medium priority questions, you can filter out the data elements that are only connected to low-priority questions. Keep in mind that some data is attached to multiple questions of varying priority level. Note that the filtering you do here flows through to the list of questions you engage with in Step 4.

The reliability of data (i.e. extent to which it reflects reality) in a particular field is of course not actually a binary distinction, but rather a spectrum, from completely accurate to completely inaccurate, and everything in between. The key question to consider when deciding to mark an element as unreliable or not is whether it is accurate enough to inform decisions about individual teachers. If not, then you should mark it as unreliable. Note that, even if it is too unreliable to inform decisions about individual teachers, it may still be accurate enough to inform decisions about groups of teachers (e.g. teachers at a particular school, or from a particular hiring source), by drawing insights from aggregated teacher data. If that is the case, mark it as unreliable, but know that it can still be used for insights about groups of teachers.

Note: for any data element, you can view the questions it is associated with by clicking on the name of the data element, and then clicking the “Show Questions” button.

**Step 3: Define Data View Phases**

Since you likely won’t be able to construct all desired data views at once, and will instead make them accessible to decision makers in phases, this step allows you to determine how many rollout phases to include in your plan as well as name these phases. Determining how many phases you’ll have and when you plan to deliver each phase should be done in concert with your data/technology team. If you already have plans for the timeline on which phases will be delivered, you may want to include the timing in the phase name (e.g. Phase 1 – March 2016). If you don’t yet have plans for the timeline on which phases will be delivered, you may just want to number the phases, and come back later to determine the timeline. The number and frequency of phases will likely depend on the data/technology team’s capacity to create data views, and possibly on the district’s capacity to train decision-makers on using them. You should enter the phases in chronological order, from earliest to latest, although we suggest that the first phase listed is named “Data Views Already Created,” so that if you already have data views that answer certain questions, you can place them in that category.

Note: you may decide to only plan out a subset of the phases you intend to have, and return later to plan out subsequent phases.


**Step 4: Schedule Data Views**

For each data view you want to create, this step allows you to place it into one of the data phases defined in Step 3. The data views are organized by human capital areas, ranked by priority level.

NB: The filters you selected in Step 2 (e.g., only dealing with high and medium priority data views) apply here as well.

The elements that should inform determining the priority and chronology of releasing data views are:

- The benefit of having the data view (i.e. the priority level from Step 1)
- The availability of data (i.e the output of Step 2) The strategic coherence of views you want to roll out at the same time.
- The capacity of the data/technology team to create data views

Thus, Step 4 should either be done in concert with the data/technology team, or should be reviewed by them before plans are locked in place.
## Appendix: The ERS Talent Decision Framework

<table>
<thead>
<tr>
<th>Hiring</th>
<th>Teacher/Teacher Leader</th>
<th>Principal</th>
<th>Principal Supervisor</th>
<th>Central Office</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hiring Needs</td>
<td>Advise</td>
<td>Assess</td>
<td>Support principals</td>
<td>Project out</td>
</tr>
<tr>
<td>Hiring Process</td>
<td>Advise</td>
<td>Adjust</td>
<td>Identify best practices</td>
<td>Adjust</td>
</tr>
<tr>
<td>Recruitment</td>
<td>Advise</td>
<td>Interview targeted candidates</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Selection</td>
<td>Advise</td>
<td>Make offers</td>
<td></td>
<td>Adjust</td>
</tr>
</tbody>
</table>

### Job & Team Assignment

| Certifications | Consider options | Advise teachers | Support principals | Provide incentives |
| Departmentalizing | | Assess | Support principals | |
| Distribution of Teachers | | | Assess | |
| Excessed Teachers | | | Assign | |
| Job Assignments | • Determine personal preferences • Help match teachers to students | • Differentiate workload • Match teachers to students | • Support student-teacher matching • Support workload differentiation | |
| Teacher teams | Advise assignments | • Assign teachers • Provide expert support • Assess needs | Support principals | |

### Measuring Teacher Effectiveness

| Evaluation Load | • Assess overall resources • Assess school need |
| Evaluation Practices | • Adjust • Gather data | Disseminate best practices | Prioritize rubric skills |
| Evaluation Training | | | Differentiate |

### Professional Growth & Support

| Best Practices | | Identify and disseminate | Identify and disseminate |
| Collaborative Planning Time | Design | | |
| Individual PD Plan | • Develop • Adjust | Support | |
| Instructional Leadership | Build out team | | |
| PD Resources | | • Ensure equity • Ensure focus | |
| School PD Plan | • Develop • Adjust • Plan observation cycles | Support principals | |
| Struggling Teachers | | Identify needs | Adjust supports |
| Team PD Plan | • Develop • Advise | | |

### Career Path

| Career Goals | Plan | | |
| Ineffective Teachers | Manage out | Support managing out | Review managing out process |
| Teacher Leaders | Recommend | Select for school roles | Support principals | • Select for district roles • Support principals |
| Tenure | Grant | Support principals | | Ensure rigor |

### Value Proposition

| Benefits | Assess strategy | |
| Career Ladder | Advise | Adjust | Advise on strategy | Assess strategy |
| Salary | | | Assess strategy | |
| Teacher Recognition | Advise | Adjust strategies | Support principals | Assess strategy |
| High-Performers Retention | • Advise on candidates • Advise on process | • Adjust strategies • Identify high performers | • Support principals • Disseminate best practices | • Assess strategy • Identify best practices |
| Working Conditions | | Adjust | Support principals | Assess strategy |
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