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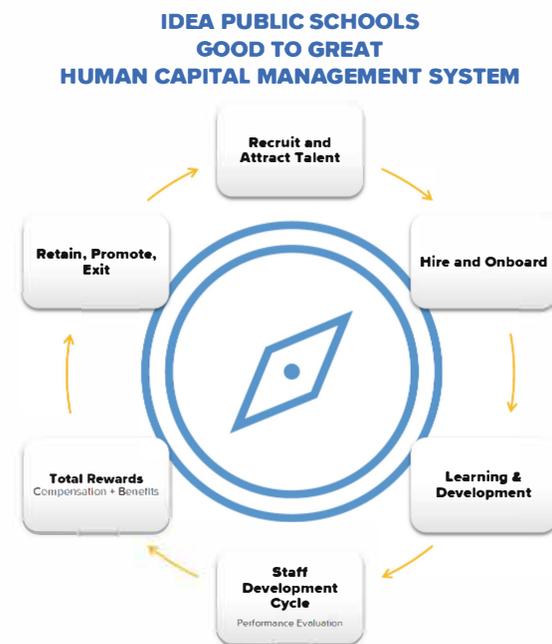
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## Absolute Priority 1: Human Capital Management Systems (HCMS) or Performance Based Compensation Systems (PBCS)

*IDEA will improve and expand its HCMS in collaboration with teachers, principals, and other school leaders*

Over the past 20 years, IDEA Public Schools has built powerful systems to analyze and improve student achievement. IDEA’s history of 100% college acceptance and 99.9% college matriculation makes it one of the highest-performing charter school systems in the nation, even as the network grows to new regions. With

funding from this Teacher and School Leader Incentive Program, IDEA now has an unprecedented opportunity to improve and expand its Human Capital Management System by directing this same level of power to the transformation of similar systems for adults. As IDEA’s student population will increase by 81% in the next three school years—from 50,740 near 93,000—the time to improve and expand its current HCMS is *now*.



This proposal identifies the gaps and weaknesses in IDEA’s current HCMS and provides evidence of collaboration with and support from IDEA’s national board, from district and school leaders across all regions of Texas, and from its highly regarded Teacher Laureates and Teacher Advisory Council.

The resulting project—***Good to Great: Transforming Teaching and Learning at IDEA Public Schools***—will ensure 360-degree transparency for teachers and their managers regarding the entire HCMS and PBCS process, remove barriers to equitable access of information and

career progression, and free individual employees to become the true architects of their career paths at IDEA. **Good to Great** takes IDEA’s existing PBCS (called **Total Rewards, Appendix D.1**), to the next level by adding a multiplicity of differentiated, targeted, and personalized professional development and support components, making it accessible anytime/anywhere via a robust new and scalable platform called **Roadmap**, and housing it all within one central HCMS portal, called **Compass**—all in service of increasing teacher retention and student achievement.

### Absolute Priority 2: High-Need Schools

IDEA locates all its schools in high-need communities and educates a total student population that is more educationally and economically disadvantaged than the average across the State of Texas.

Indicator <small>2018-19 State Data (IDEA: 2019-20 Data)<sup>1</sup></small>	Hispanic	White	Afr Amer	Econ Disadv	Special Ed	ELL
<b>IDEA Public Schools – ALL</b>	<b>90.5%</b>	<b>4.0%</b>	<b>4.1%</b>	<b>87.1%</b>	<b>5.4%</b>	<b>36.0%</b>
<b>State of Texas</b>	<b>52.6%</b>	<b>27.4%</b>	<b>12.6%</b>	<b>60.6%</b>	<b>9.6%</b>	<b>19.5%</b>

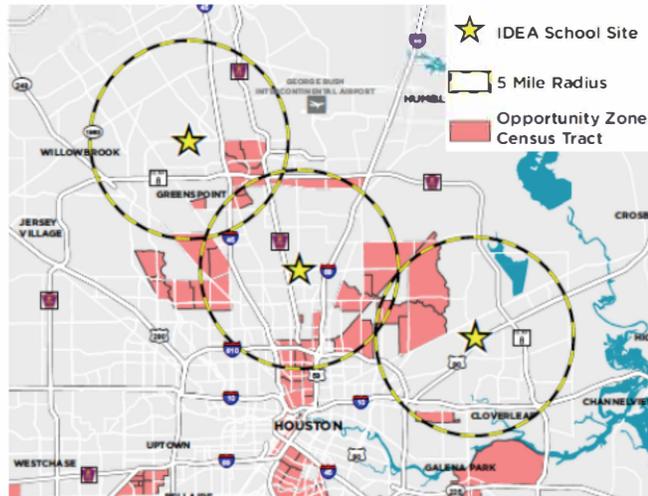
The complete list of IDEA schools in Texas (2019-20), attached in **Appendix D.2**, shows that all are high-needs as defined by the student body’s overall participation in the Federal free and reduced-price meal program. Of the 91 schools listed, 86 serve economically disadvantaged populations of 70% or greater; 67 serve economically disadvantaged populations of 80% or greater; and 41 serve economically disadvantaged populations of 90% or greater. **Every teacher and school leader at IDEA serves high-needs students in high-needs schools.**

### Competitive Preference Priority 1—Spurring Investment in Qualified Opportunity Zones

**Appendix D.3** contains maps showing the locations of IDEA’s school sites in relation to the Opportunity Zone Census Tracts in all seven existing IDEA regions—Austin, El Paso, Tarrant County/Fort Worth, Houston, Permian Basin, Rio Grande Valley, and San Antonio<sup>1</sup>. As an example, the service area for all three of IDEA Houston’s campuses (each campus includes a K-

<sup>1</sup> Corpus Christi, opening in 2024, has not yet identified its school sites.

5<sup>th</sup> grade Academy and a 6<sup>th</sup> -12<sup>th</sup> grade College Prep school) overlaps a portion of nearby Qualified Opportunity Zones as indicated by the dashed 5-mile radius in the graphic at right.



Prior to a new campus opening, IDEA initially prioritizes student recruitment in each community in the five-mile radius surrounding the school. However, it should be noted many students come to IDEA from neighborhoods that exceed this radius. Therefore, many IDEA schools serve students from additional Qualified Opportunity Zones even though the campus’s service area does not appear to overlap them.

*(i) Census tract numbers of the Qualified Opportunity Zones of the proposed service areas*

The list of census tract numbers that are in this 5-mile-radius overlapping service area is attached in **Appendix D.3** as well. Nearly every IDEA campus impacts at least one Qualified Opportunity Zone.

*(ii) How IDEA will provide services in the Qualified Opportunity Zones.*

**IDEA will provide school-based services in these Qualified Opportunity Zones for students, parents, and families** through regular school-day educational services, supplemental (Saturday and summer) education, social-emotional learning activities, physical education, the Federal free and reduced-price meals program, college preparation and counseling, career exploration and preparation, financial aid applications, college application completion and preparation, and standardized college admissions testing, among other core curriculum and enrichment activities. IDEA also manages a districtwide health, wellness, and nutrition program

known as Healthy Kids Here, that was initially funded by a 2014 Carol White Physical Education Program (PEP) grant.

Additionally, IDEA creates jobs in each community and region through the building of new campuses and staffing each with a full complement of teachers, leaders, and support personnel.

### Competitive Preference Priority 2—IDEA is a New Potential Grantees

IDEA Public Schools has never received a grant, including through membership in a group application, under the Teacher and School Leadership Incentive Program.

### Introduction and Applicant Background

IDEA Public Schools, the applicant for this Teacher and School Leadership Incentive Program grant program, began as the IDEA Academy, an after-school program in Donna, Texas in 1998. IDEA enjoyed quick success, and the State of Texas granted a charter to IDEA in 2000. Between 2005 and 2012, IDEA launched 22 schools and learned to replicate and scale its systems and processes.



**What started as one small school with 150 students is now the nation’s fastest-growing network of tuition-free, Pre-K-12 public charter schools with an ongoing track record of academic excellence.** IDEA has been named **America’s Best Charter School Network** by the Eli and Edythe Broad Foundation, listed by The Washington Post among the **top 1% of America’s Most Challenging High Schools**, and is nationally ranked on U.S. News & World Report’s **best high schools** lists (see **Appendix D.4** for IDEA’s accolades and sources for each). Perhaps most noteworthy: **IDEA has maintained a track record of 100% college acceptance for the past 14 consecutive years.**

Today, IDEA Public Schools enrolls 50,740 students across five regions in Texas. **Over the next three years IDEA will grow to serve nearly 92,000 students across seven Texas regions, expanding to Permian Basin, Houston and Corpus Christi.**

**A. Need for Project**

*(i) Specific gaps or weaknesses in services, infrastructure, or opportunities to be addressed*

Over the past 20 years, IDEA Public Schools has proven it can grow while maintaining strong student academic outcomes.

**HISTORICAL DATA**

	2012 – 13	2013 – 14	2014 – 15	2015 – 16	2016 – 17	2017 – 18	2018 – 19	2019 – 20
# of Students	12,567	15,535	19,277	23,740	28,913	35,429	44,480	52,675
# of Employees	1,741	2,103	2,359	2,779	3,273	4,003	5,705	6,651
# of Schools	30	36	40	44	51	61	79	96
# of Seniors	431	510	541	504	670	872	1,160	1,185
Budget	\$123,719,332	\$170,650,700	\$211,023,141	\$269,187,102	\$315,090,932	\$395,864,079	\$530,290,723	\$700,632,186
Teacher Retention	71%	76%	84%	83%	84%	85%	83%	Data available Fall 2020
Employee Retention	79%	78%	73%	82%	83.83%	87%	83%	
ACT Achievement	19.6	19.1	20.1	20.96	20.94	20.8	20.86	
# of AP Tests Passed	555	549	1,344	1,706	1,989	2,111	2,831	
STAAR Passing	81%	82%	83%	82%	83%	83%	83%	

Budget includes IPS and Southern Louisiana beginning 2016 - 17

As IDEA grows to three new regions in Texas—including **Houston**, the largest urban area IDEA will expand to yet, West Texas’ **Permian Basin**, and Southeast Texas’ **Corpus Christi** area—it is imperative that the region’s Executive Directors have at their disposal the complete array of tools the network already deploys to recruit, screen, select, hire, and onboard its teachers and staff. **Launching new IDEA regions is a lean effort, and it is crucial that these pioneers be able to avail themselves of the systems and processes IDEA has used to scale the network this far.** However, each new region develops somewhat as an “island” unto itself, geographically far from IDEA’s Rio Grande Valley Headquarters where the network was

founded and where the rich base of instructional experience and institutional knowledge lies. New teachers in Houston, for example, cannot simply walk down the hall and observe a Master IDEA Teacher in action because there aren't any Master Teachers on a new campus in a new region in the first few years of its existence. This gap can make it more challenging for newer teachers to know the moves, behaviors, thinking and planning of Master Teachers because they are not able to see them modeled at their school.

But even in more mature regions, the barriers to accelerating teaching excellence at the same rate as the network is accelerating its growth remain high. The time required to coordinate schedules for a new or struggling teacher from Campus A to observe a Master Teacher at Campus B is onerous and constitutes a separate barrier on its own. **Therefore, the time has come to focus on location-independent solutions to human capital management problems and to combine IDEA's deep institutional knowledge of "what works" with the economies of scale that can be realized from a thoughtful leveraging of technology to connect every IDEA teacher and leader to the best practices across the district that result in consistently high levels of student achievement.**

While the rapid growth has enabled IDEA to increase educational opportunity to more than 50,000 students across Texas, there are **human capital management system levers that must scale quickly and gaps to address as IDEA prepares to double in size.** Although IDEA has developed robust performance and development tools for teachers and leaders, the outputs and metrics live in disparate systems which limit leaders' understanding of teacher and leader performance across every measured variable across the district. This gap has caused regional leaders to create their own data solutions for succession planning, promotion and evaluation.

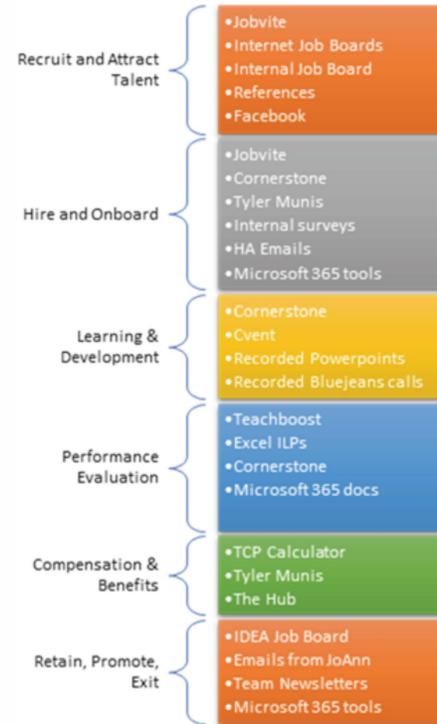
The systems IDEA created to support the key levers of their human capital management

system weren't designed for the scale, analysis and supports needed to foster IDEA's vision of being a great place to work for teachers and leaders across Texas. Disparate platforms, clunky interfaces, quick solutions to solve immediate problems and a strong veteran leadership team that holds institutional knowledge have held IDEA back from applying the same systems thinking that have been implemented on the curriculum side to the HCMS experience and functionality for the adults on the frontline. This has left IDEA with gaps in historical context or information that should be used to determine effectiveness, success and leader identification "on record". TSLIP funding will provide IDEA with supplemental financial support to go beyond being the best school system for students to also be the best school system for teachers and leaders.

**IDENTIFIED GAP/WEAKNESS 1: Currently, IDEA operates without a single system or platform where student achievement data, teacher and leader performance data, and professional development are captured. Data including, but not limited to, tenure, demographics, the staff development cycle, talent review ratings, performance mastery through aligned rubrics, professional development pathways, and career history are disconnected. Having data for teachers and leaders across different locations seriously hampers IDEA's ability to identify inequities across the hiring and development continuum, bright spots that can inform retention, illuminate data correlations to increase resources with high return on investment, and develop initiatives that evaluate the utility of measures across the human capital management cycle.**

The graphic on the following page shows the multiplicity of siloed data sources that teammates and employees must sift through to collect the information needed in each area of the HCMS.

Currently, although the information is known to them and retrievable from various locations, a teacher cannot see in one location their employment history, Teacher Career Pathway (TCP) Score (see **page 19** and also **Appendix D.5**), their history of jobs/roles at IDEA, their TeachBoost action steps, the goals they set with their manager, their bonus eligibility (based on their classroom and/or campus goals), their progress through various professional development programs, or other roles at IDEA for which they may be eligible or want to apply. Teachers should not have to spend time sifting through multiple locations to find their metrics and work history to have a comprehensive snapshot of their growth and performance. IDEA needs a system that liberates teachers from the hunt for information so they can have clarity about their strengths, growth areas and most importantly, what steps they need to take to improve and achieve their goals. The time-consuming process of tracking down the different performance metrics also impacts leaders and central office staff who end up wasting time creating their own siloed processes for analyzing outcomes across the HCMS continuum. As excellent student achievement results (see graphic, **page 5**) are a core determinant for all evaluations and promotion decisions at IDEA, having all of this data visible and accessible helps teachers and leaders see how they are directly contributing to student achievement on their campus and in their role, helps district leaders hold principals and teachers accountable to student performance results, shines a light on top performers, and zeroes in on areas where student data show teachers need assistance from administrators.

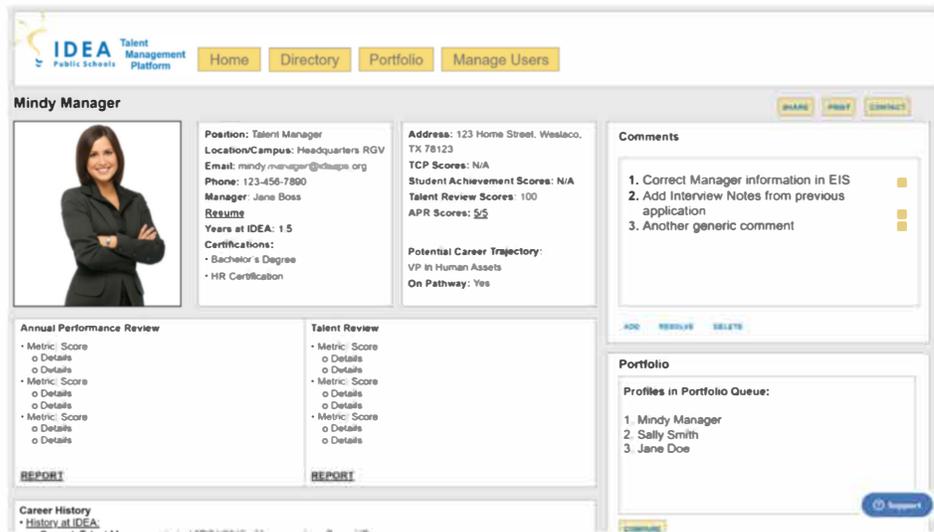


**Good to Great Solution: Build Compass—a single talent management platform that aggregates data from multiple existing sources (HCMS and PBCS) and allows for the creation of new sources of information input as well, thereby increasing the effectiveness, fairness, quality, consistency, and reliability of the overall evaluation, promotion, and compensation systems and their processes.**

Through Compass, IDEA teachers will have a single landing page that includes their contact information,

performance history, evaluations, TCP ratings and career pathway trajectory to name a few.

Leaders will save



time by having comprehensive valid and reliable data to inform important human capital decisions. In addition, IDEA will be positioned to create cycles to analyze data over time—where new data and old data will allow the Human Assets team to get better—matching career tracts and content to opportunities to teachers and leaders. While student achievement data remains the most important factor in an IDEA employee’s evaluation, additional metrics to assess a teacher and leader’s performance will also be included to create a whole picture of every teacher and leader. All teachers and leaders will have a profile beginning in 2020-21 that will ensure a consistent experience and accurate information. The software programmers will work closely with the Human Assets Team during the development to ensure the Phase 1 and Phase 2 designs address the insufficiencies and support our teachers and leaders.

Teachers and leaders will have access, opportunity, and transparency regarding their performance at IDEA with clear career advancement pathways to empower teachers and leaders to pursue advancement on the Teacher Career Pathway or School Leadership Levers. Instead of managers relying on the potential internal candidates that were available to them because of proximity, relationship, or those identified in the most recent talent review. Compass can evolve IDEA's practice. With Compass, IDEA can create a more intentional, objective, and accessible way to identify internal teachers and leaders across regions, roles, and demographics. Relying on the fair comparison and clearly outlined indicators for readiness and success that our students and schools need. This will remove managers as the gatekeepers of advancement opportunities while making clear the pathways and criteria to reach them. It will also have the effect of making IDEA a more equitable organization.

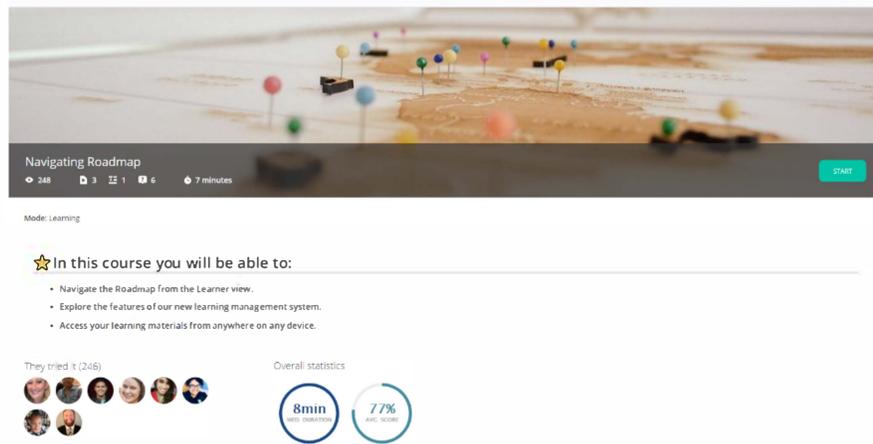
**Resources Required:** 1 Director of Talent Management, 1 Compass Project Manager; 6 IT staff

**IDENTIFIED GAP/WEAKNESS 2: IDEA's current content learning and professional development platform (Cornerstone and Cvent). The current platforms are challenging for users to navigate, lack actionable/trackable data, and are not easily adaptable to remote work and distance learning, resulting in a platform that is rigid, ineffective and insufficient to meet the professional development needs of the does not ensure high quality and reliable professional development learning. It also lacks content specifically tied to the Guideposts for Excellent Teaching (GET) and School Leadership Levers (SLL) rubrics (Appendix D.6 and Appendix D.7) that are key to teacher and leader development and advancement across the IDEA network and does not integrate with TeachBoost, IDEA's teacher and leader development dashboard for documenting observations and providing feedback.**

As IDEA continues to grow, it is even more important that its professional development learning platform provides reliable, consistent, and high quality data to assess the effectiveness of the online learning and also minimizes cost and strain to the organization by being accessible from anywhere at any time. Additionally, its capabilities for multimedia and artifact integration be able to grow along with it. (See **Appendix D.8** for the U.S. Department of Education Office of Educational Technology’s “Online Professional Learning Quality Checklist”.) Cornerstone was challenging to navigate and didn’t have the functionality to measure effectiveness or flexibility for IDEA leaders to customize and upload professional development aligned to trends. The insufficiency of Cornerstone resulted in leaders across Texas creating their own digital professional development sessions, often duplicating efforts and didn’t include measurements of effectiveness and quality. Cvent was predominantly a schedule interface for managing large volume face-to-face trainings and was not scalable on the basis of functionality and cost per user.

**IDEA will launch a replacement system, called Roadmap.** Roadmap allows for IDEA leaders to create customized digital professional development accessible on any device. Roadmap will streamline and centrally manage job specific learning and event management through online, and blended modalities, empowering facilitators to deliver effective content through engaging instructional features.

Facilitators can develop sessions of any length on any content that needs a scalable digital learning solution using



documents, video<sup>2</sup>, html-coded copy, and built in quizzes to check for understanding. The functionality is easy to navigate and provides instant actionable data to inform the content owner about the participation, completion time and mastery of objectives—a capability that IDEA has never had full access to before.

**Good to Great Solution: Develop and build Roadmap focused on teachers and leaders as the end user with digital content showing best practices and artifacts from our highest performing teachers and leaders. The Guideposts for Excellent Teaching (GET) Digital Library (for teachers) and the School Leadership Levers (SLL) Digital Library (for school leaders) will provide teachers and leaders, respectively, with meaningful digital content (videos,**



### Teacher Digital Library

I've never taught 6<sup>th</sup> grade math. Who can I observe to see how I should introduce the next Eureka unit?  
 What does exemplary Guidepost 4 look like in 2<sup>nd</sup> grade writing?  
 Where can I find samples of formative assessments that Level 5 AP Biology teachers use?  
 What does exemplary Guidepost 2 look like for a Direct instruction classroom?



### School Leader Digital Library

I'm a first-year principal and I am leading my first weekly data meeting with my K and 1<sup>st</sup> grade team next week. How should I prepare?  
 I need to do a culture reset for hallway procedures for our 6<sup>th</sup> graders, but I'd like to see how different leaders to do it so I can figure out what works for me.  
 What are the plans and mechanisms that Principals at A rated schools implement to build culture? Where can I find those plans?

artifacts, student exemplars, reflections, interviews) from IDEA’s best teachers and leaders to support every teacher and leader on their path to become excellent in their role, as measured by their student achievement, student persistence and student retention outcomes, while simultaneously highlighting IDEA’s highest-performing teammates.

**Resources Required:** 1 Roadmap Project Manager; 2 Directors, Digital Content Curation and Strategy (1 for Teachers; 1 for Leaders);, 1 Videographer

<sup>2</sup> Related research: [https://cepr.harvard.edu/files/cepr/files/1.\\_leveraging\\_video\\_for\\_learning.pdf](https://cepr.harvard.edu/files/cepr/files/1._leveraging_video_for_learning.pdf)

**IDENTIFIED GAP/WEAKNESS 3: IDEA’s rapid expansion means the majority of teachers—and especially those in the newest regions—are Level 1 (Welcome to IDEA) teachers. This means new schools in new regions, and even new schools in established regions, are staffed with the least experienced teachers. Therefore, IDEA must find ways of supporting teachers to get better faster.**

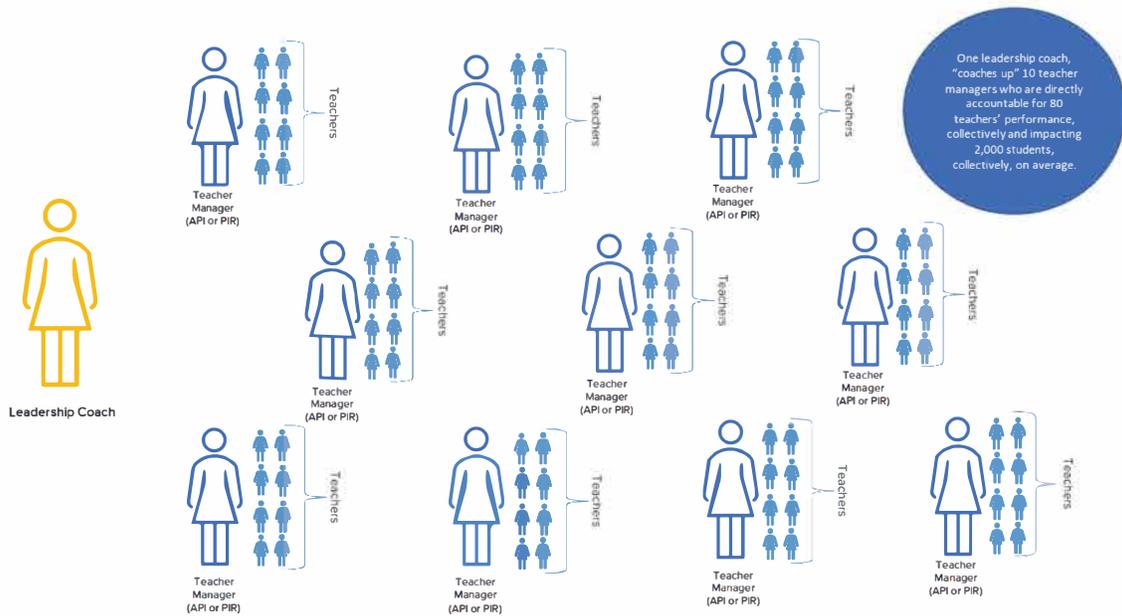
The table at right (organized from IDEA’s oldest to newest Texas regions) shows the percent of teachers at each Teacher Career Pathway Level, 1-5 in the beginning of the 2019-20 school year. (Please see **page 19** as well as **Appendix D.5** for more detail on each level.) The TCP Level distribution shows the problem new regions face, being heavily weighted with new teachers.

REGION/LEVEL	# TEACHERS	AS % OF REGION	RATING DISTRIBUTION ACROSS DISTRICT
<b>Rio Grande Valley</b>	<b>1,273</b>		
Level 1	262	20.58%	38%
Level 2	37	2.91%	38%
Level 3	340	26.71%	55%
Level 4	479	37.63%	71%
Level 5	155	12.18%	79%
<b>San Antonio</b>	<b>661</b>		
Level 1	223	33.74%	32%
Level 2	38	5.75%	39%
Level 3	211	31.92%	34%
Level 4	157	23.75%	23%
Level 5	32	4.84%	17%
<b>Austin</b>	<b>218</b>		
Level 1	121	55.50%	17%
Level 2	12	5.50%	12%
Level 3	52	23.85%	8%
Level 4	26	11.93%	4%
Level 5	7	3.21%	0.4%
<b>El Paso</b>	<b>74</b>		
Level 1	43	58.11%	6%
Level 2	1	1.35%	1%
Level 3	19	26%	3%
Level 4	11	15%	2%
Level 5	0	0	0%
<b>Tarrant County</b>	<b>45</b>		
Level 1	44	97.78%	6%
Level 2	0	0	0%
Level 3	0	0	0%
Level 4	1	2.22%	0.1%
Level 5	0	0	0%

At IDEA, Principals are the instructional leaders of their campuses. Assistant Principals of Instruction (API) and Principals in Residence (PIR) are the “leader bench” that are positioned to lead a new school and are accountable to managing a cohort of 8-10 teachers. Each campus also employs an Assistant Principal of Operations who oversees all non-instructional functions, thus freeing the Principal, APIs and PIRs and to coach and develop teachers measured by improving student achievement results. In summary, teachers are coached by Principals, Assistant Principals of Instruction and Principals in Residence. Leadership coaches develop the executive functioning and instructional coaching skills of every Principal, API and PIR.

**Good to Great Solution: Coaching Accelerator.** In an effort to achieve IDEA’s vision of

having a Level 5 teacher in every school across the district, IDEA proposes to significantly increase its coaching capacity and create a TSL funded in-field accelerator leadership coaching team. Each leadership coach would have a roster of 8-10 instructional lead team members and those lead team members will coach 8-10 teachers, resulting in one coach, conservatively, impacting the achievement of more than 2000 students.



Every teacher has a manager on a schools’ lead team that engages in a weekly observation and coaching conversation. IDEA refers to this process as the coaching cycle. Level one and two teachers often need more than one observation a week as they are learn initial habits and behaviors across the guideposts in the GET rubric that will result in success, which is why IDEA proposes increases leadership coaches to give campuses more capacity to support first year teachers and free up existing coaching staff to focus on teachers rated Level 3, 4, and 5 on the TCP.

Learning and development is a key component in IDEA’s HCMS. IDEA has seen first-hand how investing in robust coaching has developed great coaching in the Rio Grande Valley where

there is the highest concentration of level 5 teachers. On the other hand, Tarrant County opened their schools with nearly every teacher rated Level 1 and Houston is projected to open in August with 75% of Level 1 teachers. The current staffing model doesn't allow for coaching distribution to be adjusted based on teacher rating distribution, creating a coaching gap for schools that need more coaching capacity to support Level 1 teachers. IDEA knows that every school in every region needs more level 5 teachers and the coaching accelerator will support IDEA's vision to achieve that goal.

IDEA wants to accelerate the growth of teachers by providing more individual attention and tight cycle management, accelerating teacher managers' ability to coach along the Teacher Career Pathway. Teacher managers (Principals, APIs and PIRs) will use TeachBoost to measure the action steps and progress of teachers. Finally Accelerator Leadership Coaches will provide insight to the practices and artifacts for Roadmap's digital content best practices library. (See **Appendix D.9**, TeachBoost Coaching Guide.)

The leadership coaching team will extrapolate learnings to scale the most effective strategies and tactics across the district, increasing student achievement outcomes for tens of thousands of students. (IDEA will maintain a TSLIP Coaching Cohort to specifically measure the success of the Coaching Accelerator as evidenced by the student results produced by the teachers whose leaders are coached by this team.)

**Resources Required:** 12 Leadership Coaches over three years; TeachBoost licenses for Accelerator Coaches and Level 1 teachers over the grant term

**IDENTIFIED GAP/WEAKNESS 4: IDEA maintains an org-wide goal of 85% overall teacher retention. Goals for the Teacher Career Pathway include 85% retention of Level 3 teachers and 95% retention of Level 4 and Level 5 teachers. Currently, IDEA does not**

**have a dashboard to quickly view retention over time by school, grade and content placement. With the development of Compass, IDEA will be able to easily measure teacher retention and test different strategies to measure intervention effectiveness that could scale district-wide.**

**Good to Great Solution: Level 5 Teacher Retention Pilot.** According to Huling-Austin (1986), 40-50% of teachers leave the profession during the first seven years of their career and in excess of two-thirds of those will do so in the first four years of teaching. More teachers leave within the first nine years of their careers; fewer teachers leave during mid-career and the rate increases as teachers approach retirement. In addition, Brummet, Gershenson & Hayes (2017) found that teachers that switch grades leave their schools the following year at a rate 40 percent higher than average. In an effort to retain its Level 5 teachers (who comprise the top 5% of all teachers across the district), **IDEA will launch a pilot with 10% of its Level 5 teachers to test the premise that keeping the highest-performing teachers in the same grade and content area will result in 90% retention of these high-value human resources.**

*(ii) Good to Great will integrate with or build on similar or related efforts to improve relevant outcomes using existing funding streams from other programs or policies supported by community, State, and Federal resources*

The **Teacher Career Pathway**, IDEA’s differentiated reward, recognition, and retention program, described more fully in the next section, was launched as a natural next step from the work of IDEA’s Investing in Innovation (i3) grant, awarded by the U.S. Department of Education in 2010 (see Abstract, attached in **Appendix D.10**). That project laid the groundwork for recruiting, developing, and retaining a talented workforce and still exists in the form of IDEA’s New Teacher Institute (**Appendix D.11**).

Once a teacher applicant is hired as an IDEA teacher, they are immediately placed on the Teacher Career Pathway (TCP). The TCP pilot launched in 2014 with teachers receiving their first-ever pathway placements, public recognition, and professional development budgets<sup>3</sup>. The Teacher Advisory Council (TAC) began the same year. The TAC opened a direct line of communication between IDEA campuses and IDEA Headquarters. Teacher feedback received during the twice annual TAC meetings shaped multiple components of the TCP, among other district initiatives. The 2015-16 school year marked the formal commencement of the TCP.

The TCP has received **funding support** from a highly competitive Educator Excellence Incentive Program grant (2014-16) from the Texas Education Agency, and IDEA has a multi-year Teacher Incentive Allotment grant that is currently pending TEA approval.

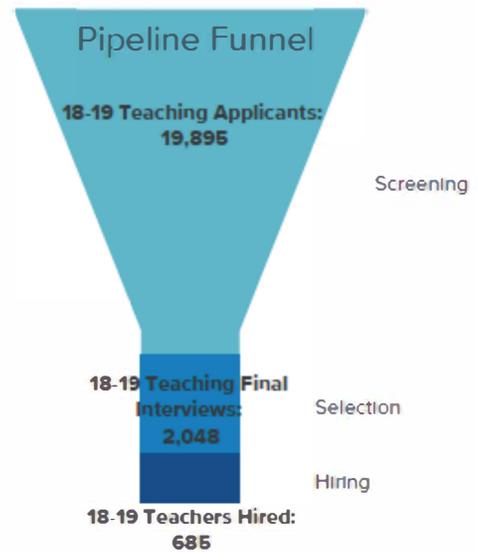
*(iii) Good to Great is part of a comprehensive effort to improve teaching and learning and support rigorous academic standards for students*

It is the vision of IDEA's Human Assets/Talent Acquisition Team to have "an excellent teacher in every classroom and an outstanding principal on every campus", but the graphic on the following page shows just how challenging it is to hire a sufficient number of IDEA teachers to begin with. **In 2018-19, for example, just 3.4% of teaching applicants (685 out of 19,895) made it through IDEA's rigorous screening and selection process.** Applicants are first screened for alignment to IDEA's competencies and core values through Jobvite. Those who make it through this baseline fit-test are given a rigorous writing task, have their references

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<sup>3</sup> Level 4 teachers receive \$500 and Level 5 teachers receive \$1,000 to apply to the professional development opportunity of their choice to tailor their professional growth to benefit their practice and their students.

checked, are administered content assessments, and participate in a video interview. The next stage includes a phone interview, a demonstration of teaching excellence, and a final interview, which the candidate then debriefs with the principal prior to being given a verbal offer and Intent to Hire letter. The final steps include a background check and clearance, New Teacher Institute, on campus onboarding, and specific support to ensure they have a successful first 90 days at IDEA.



Over time, IDEA has successfully identified, honed—and scaled—its screening, selection, and hiring processes (see **Appendix D.12**, “Teacher & Co-Teacher Selection 2019-20 Hiring Season”). As a data-driven organization, IDEA’s Human Assets/Talent Acquisition Team is also responsible for contributing

to the success of, among other metrics, the following goals: 85% overall teacher retention; and 80% retention among Welcome to IDEA (or Level 1) teachers. The graphic at right gives a brief “biography” of an IDEA teacher at each TCP Level, 1-5.



## **How Teacher Career Pathway Placements Are Determined**

### *Composite Scores*

The first step in pathway placement is determining a teacher’s composite score on a balanced scorecard. This scorecard is a summary of several metrics, each weighted according to their impact on a teacher’s capacity to put students on the road to college: **Student Achievement—50%; Manager’s Ratings on the Guideposts for Excellent Teaching (GET)—35%; Student Input—5%; Parent/Family Input—5%; Demonstration of IDEA Core Values—5%.**

### *Student Achievement Data*

**Student achievement data is heavily weighted because of its great impact on IDEA students’ future options.** Student achievement is measured differently for each course based on available international, national, state, and local assessments. Additionally, many courses—such as electives—have unique measures of success, created internally at IDEA in order to measure the course’s benefit for students. It is important to ensure that all teachers have a clear understanding of how student performance impacts pathway placement. Thus, rubrics for each grade level and content area are published in the appendix of the Teacher Career Pathway Handbook.

### *Student and Family Responses*

**Student and family survey responses allow composite scores to include the perspective of IDEA’s most important stakeholder groups.** These responses bring special insight into a teacher’s contributions, painting a more complete picture of his or her impact. To ensure this insight is as accurate as possible, IDEA contracts with an external survey provider. The provider validates the quality of the surveys as well as their statistical reliability. (See **Appendix D.13.**) **Furthermore, the Teacher Career Pathway Team is actively working to make certain that**

survey rosters are accurate and appropriate to improve the integrity and accuracy of the survey reports.

**Demonstration of IDEA Core Values**

The Teacher Career Pathway uses IDEA’s six core values to gain insight into less tangible—but highly important—workplace qualities. These include work ethic, attitudes, commitment to IDEA’s mission, ability to cooperate and collaborate with others, and overall professionalism. The metric for core values ratings comes from managers’ ratings on Guidepost 6 (Core Values) during the Annual Performance Review. The six Core Values are No Excuses, Whatever It Takes, 100% Every Day, Sweating the Small Stuff, Closing the Achievement Gap, and Team and Family. Please see **Appendix D.14** for more elaboration on these values.

**GET Rubric Ratings**

The Guideposts for Excellent Teaching (GET) Rubric (Appendix D.6) is part of a teacher’s score because it is a reliable, research-based, district-wide measure of performance in the classroom. The GET outlines six guideposts of an effective classroom. Each teacher is provided with a GET rubric that explicitly states best teaching practices within each guidepost.

Sample Row in Guidepost 1

	<b>GUIDEPOST 1: Goals</b> Smart Goals: Sets ambitious goals and invest students and families					SMART GOALS: Sets SMART goals that drive instruction and classroom focus	<b>1A</b>
	<b>(i) Specific</b>	<b>I</b> Pre-Novice	<b>II</b> Novice	<b>III</b> Proficient	<b>III</b> Advanced	<b>IV</b> Exceptional	
	No attempt or actions.	Class goals are broad and general. They are posted in the classroom.  Students do not make individual goals, or their goals are generic and/or non-academic (e.g., do better in class this year, get on to the soccer team).	Class goals are specific and aligned to end of year exam or district goal. They are posted in the classroom.  Student goals are the same as the class goal (e.g., class goal is 100% pass the STAAR, individual goal is pass the STAAR). These goals are recorded, but not posted.	Class goals are specific and align to end of year exam or district goal and skills needed for college/careers.  Each student's goals are individualized and based on past performance.  Class and student goals and tracking system(s) are posted in a highly-visible place in the classroom.	Class goals are specific and align to end of year exams or district goals and building college/ career skills, key mindsets, and/or emotional intelligence (e.g., grit).  Each student has individualized, specific goals based on past performance. The goals are for the end of year exam and college/career skills, mindsets, and/or emotional intelligence.  Class and student goals and tracking system(s) are posted in a highly-visible place in the classroom.  The presentation of the individual goals includes pictures, quotes, and/or other reflections from students that will help motivate them throughout the year.		

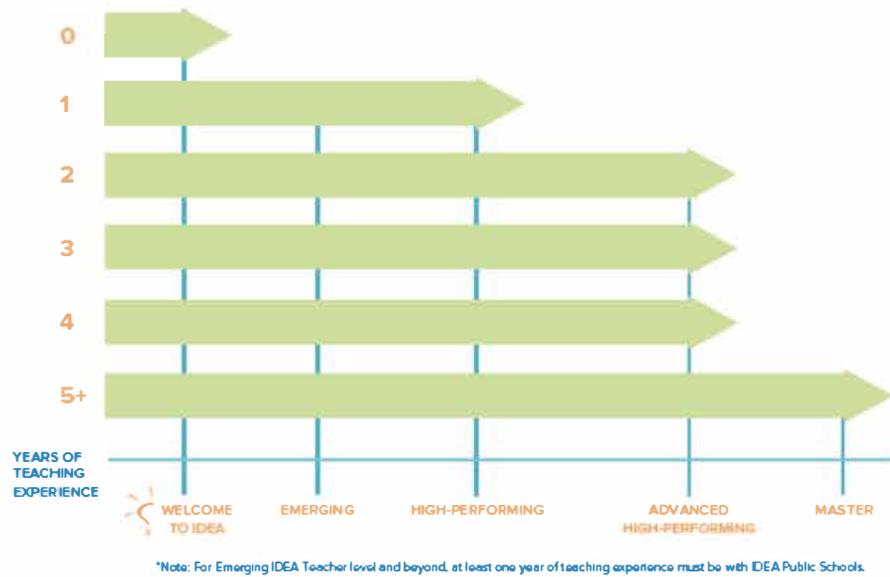
It also provides a ranking system—Pre-Novice, Novice, Proficient, Advanced, and Exceptional—so that teachers can determine areas of growth and areas of aptitude. IDEA has found that successful teachers use the GET rubric as an accountability measure for their practice. They identify areas for improvement, set goals, and work toward those goals.

GET Rubric scores for the Teacher Career Pathway are the same ones a teacher receives during the annual performance review with his or her manager. Managers receive intensive training on the GET Rubric throughout the year, ensuring their ability to use the tool accurately and reliably. GET norming involves watching videos of teaching practices, reviewing the rating guidelines, taking certification tests to assure ability to norm with the rubric, and becoming "certified" before completing annual performance reviews. While the GET rubric is used for evaluation, it is also a strong tool to provide specific ways for teachers to improve their practice and develop their strengths.

### *Years of Experience*

Once a teacher's composite score has been determined **that score is filtered through the teacher's years of teaching experience.** Years of experience—at least one of which must be with IDEA—determine the Levels on the pathway for which a teacher is eligible. For example, a Master Teacher must have at least five years in the classroom, one of which was with IDEA. (Adding years of experience to the Pathway placement metric is a result of the Teacher Advisory Council's input.)

In the first year with IDEA, all teachers, regardless of prior experience, begin at the Welcome to IDEA Level. After the first year, all prior teaching experience is included. The chart at right shows how years of experience determine pathway placement Levels.



The green arrows represent all pathway Levels that are available to a teacher with the corresponding years of teaching experience. The actual placement within that green arrow is determined by the composite score explained on page 19.

***Manager Approval***

Once a teacher’s composite score and years of experience are accounted for, it is time for the final step in pathway placement: manager and Vice President approval. Principals and all teacher-managers review pathway placements on their campus with the support of their VP and a member of the Teacher Career Pathway Team. Campus lead team members add context to the teacher evaluations and may make appeals based on their knowledge of special campus situations from the previous year.

*(iv) The design of Good to Great is appropriate to, and will successfully address, the needs of the target population and other identified needs*

Every year, students in the United States lose a month’s worth of learning over the summer, with the sharpest learning declines in math, seen especially in low-income students.<sup>4</sup> Some researchers suggest that despite systems’ best efforts with remote learning, school closures caused by COVID-19 could be even more damaging. One recent analysis projects that students could return in the fall having progressed only 70% of a grade in reading and less than 50% of a grade in math during the 2019–20 school year.<sup>5</sup> On top of this, the unexpected situation of a national health crisis, combined with the challenges IDEA teachers and leaders already face when educating high-needs students from educationally disadvantaged communities—language barriers, lack of sufficient educational resources at home to reinforce learning, low levels of parent educational attainment—make the need to improve structural systems supporting increased student achievement that much more urgent across the entire IDEA network. In keeping with IDEA’s Core Values, these are barriers, not excuses. IDEA teachers and leaders acknowledge they exist and then find ways over, around, and through them to improve student achievement despite their existence.

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<sup>4</sup> David M. Quinn and Morgan Polikoff, “Summer learning loss: What is it, and what can we do about it?,” Brookings Institution, September 14, 2017, [brookings.edu](https://www.brookings.edu)

<sup>5</sup> Megan Kuhfeld and Beth Tarasawa, *The COVID-19 slide: What summer learning loss can tell us about the potential impact of school closures on student academic achievement*, NWEA, April 2020, [nwea.org](https://www.nwea.org)

The gaps and weaknesses identified in Section A(i) and the concomitant solutions IDEA has formulated to address them can be couched in terms of two core overarching needs. **The core need IDEA is solving for is for teachers and leaders to have clear access to a single location where student achievement data, teacher and leader performance data, and professional development are aggregated, therefore allowing new views, queries, and connections to be made.** Once Compass is built, IDEA can ask new questions across data categories, such as “Is there a meaningful association between school leaders’ evaluation scores and student achievement or Great Places to Work survey data?” “What standard measures are used to determine core value scores on the TCP?” “Is there a meaningful association correlation between the success of the school and the caliber of talent that are promoted from there? (Do more leaders from one campus have stronger results through promotion than another?)” Both the types of questions that can be asked and the answers the improved HCMS data will allow IDEA leaders to answer will address the need for IDEA to successfully retain teachers over an extended period of time. At IDEA, for example, teacher retention in Advanced Placement subject areas could lead to increased student achievement on AP exams—important as IDEA takes an “AP for All” approach that gives every student the opportunity to take 10 AP courses during their high school career, and IDEA measures, across the district, the number and percent of students who become AP Scholars (passing at least three AP exams with a score of 3 or higher). **Co-locating human capital data and student achievement data, paired with the functionality to query and cross-reference both will produce better questions and more actionable answers that ultimately benefit both teacher and leader skills and improve student achievement results.**

The comprehensive design of *Good to Great* will build on the actionable data inside **Compass. Roadmap and its digital libraries for teacher and leaders, the Coaching**

**Accelerator** for in-field support of school leaders, and the **Level 5 Teacher Retention Pilot** are all in service of teachers and school leaders improving student achievement. IDEA knows its students are going to enter the 2020-21 school year with bigger gaps that will demand more intensive job-embedded learning and development efforts, especially in new regions and in new schools.

Because *Good to Great* includes both adults (**teachers** and **school leaders**) and **students** as the target population for this TSLIP initiative, this project’s Logic Model includes metrics to gauge the impact of project activities on each of these groups. Please see **Outputs** in the graphic in **Section B(i)** for this list.

## B. High-Quality Project Design

### *(i) Good to Great demonstrates a rationale*

IDEA’s existing resources and inputs, together with the grant-funded activities, expected outputs, and short- and long-term outcomes for *Good to Great* are summarized in the Logic Model graphic below. Together, these constitute the rationale for how this Teacher and School Leader Incentive Program will reach its four stated goals:

1. Increase the effectiveness, fairness, quality, consistency, and reliability of the overall evaluation, promotion, and compensation systems through the development of Compass;
2. Increase teacher and leader effectiveness through the development of a curated digital content library to make access to the best practices accessible from anywhere at any time;
3. Increase the effectiveness of teachers and leaders through the development of a Coaching Accelerator focused on providing capacity to “coach up” and retain teachers; and
4. Increase retention of Level 5 teachers in a pilot, measuring retention by maintaining grade and subject placements for 2 years.

RESOURCES AND INPUTS	ACTIVITIES	OUTPUTS	OUTCOMES
<b>FUNDING</b> <ul style="list-style-type: none"> <li>State Funding</li> <li>Philanthropy</li> <li>TSL Grant Funds</li> </ul> <b>TALENT</b> <ul style="list-style-type: none"> <li>Veteran Human Assets team</li> <li>VP of IT with experience developing software and programs to successfully support IDEA's mission</li> </ul> <b>INTERNAL PROGRAMS</b> <ul style="list-style-type: none"> <li>Teacher Career Pathway</li> <li>Staff Development Cycle</li> <li>Teacher Laureates</li> <li>Teacher Advisory Council</li> </ul> <b>RESOURCES</b> <ul style="list-style-type: none"> <li>The Hub (centralized access to all staff and instructional tools and resources at IDEA)</li> <li>TeachBoost (performance management platform)</li> <li>Bi-weekly Assessments &amp; Corresponding Data Rankings</li> <li>Teacher coaching frameworks and scripts</li> </ul>	<b>HCMS: IMPROVE SYSTEM COMPASS</b> <ul style="list-style-type: none"> <li>Build and launch a talent management platform to increase the effectiveness, fairness, quality, consistency and reliability of IDEA's evaluation, promotion and compensation processes.</li> </ul> <b>HCMS: LEARNING &amp; DEVELOPMENT ROADMAP</b> <ul style="list-style-type: none"> <li>Develop digital content library of exemplary teacher practices aligned to prioritized Guideposts for Excellent Teaching (GET Rubric)</li> <li>Develop digital content library of exemplary leader practices aligned to School Leadership Levers (SLL Rubric)</li> </ul> <b>HCMS: LEARNING &amp; DEVELOPMENT COACHING ACCELERATOR</b> <ul style="list-style-type: none"> <li>Create TSL leadership coach cohort to build the skill and capacity of our teacher manager, PIRs &amp; APIs to strengthen leadership capacity and accelerate teacher development so that more teachers get better faster</li> </ul> <b>HCMS: RETENTION LEVEL 5 TEACHER PILOT</b> <ul style="list-style-type: none"> <li>Launch Pilot 10% of Level 5 teachers will remain in the same school, grade and content area</li> </ul>	<b>EFFECTIVE HCMS SYSTEM</b> <ul style="list-style-type: none"> <li>80% of teachers report that TCP measures are fair and reliable across contents and grade</li> <li>Annual TCP analysis through Compass produced to illustrate TCP distribution and inform areas to improve and address increased support or inequities with the measures</li> <li>Annual SLL analysis produced through Compass to analyze SLL scores with first year principal performance to determine gaps and areas to improve</li> <li>80% of teachers and leaders respond in 21-22 that the digital library is their top recommended internal resource for best practices to become more effective</li> </ul> <b>INCREASE STUDENT ACHIEVEMENT</b> <ul style="list-style-type: none"> <li>90% of students in the accelerator cohort achieve their annual growth/learning target goals</li> </ul> <b>INCREASE TEACHER &amp; LEADER EFFECTIVENESS</b> <ul style="list-style-type: none"> <li>85% of PIRs in cohort will be rated "Principal-Ready" by the end of one year in the Accelerator</li> <li>70% of teachers who report to a PIR or API in cohort meet 90/60/30 or comparable metric (&gt;TCP 3+ Stu Ach score)</li> </ul> <b>INCREASE TEACHER RETENTION</b> <ul style="list-style-type: none"> <li>80% Level 1 teachers retained</li> <li>95% of Level 5 teachers in the pilot are retained</li> <li>85% teacher &amp; leader retention</li> </ul>	<b>SHORT-TERM</b> <p>Students in grades K-12 earn 80% Approaches   60% Meets   30% Masters on STAAR/EOC or Similar Internal Assessment</p> <p>80% Reading   80% Language   90% Math of PreK-2nd Grade Student: End the Year</p> <p>IDEA earns an A rating from TEA</p> <p>80% of teachers report that TCP measures are fair and reliable across contents and grade</p> <p>85% of Level 1 teachers move to level 2 and 3 in each region</p> <b>LONG-TERM</b> <p>Every grade at every school has at least one Level 4 or 5 teacher.</p> <p>Every IDEA student persists through college and lives a choice-filled life</p> <p>IDEA schools are community schools where educators are from the communities and represent the local community diversity</p> <p>Students persist at IDEA because it is a place where students experience joy, rigor and connection</p>

*(ii) The methods of evaluation will provide performance feedback and permit periodic assessment of progress towards achieving intended outcomes*

### **The Team**

In 2018, IDEA's Research and Analysis (R&A) team added two team members, both of whom are Harvard Strategic Data Project (SDP) Fellows<sup>6</sup> based out of the Center for Education Policy Research at Harvard University: **Rodrigo San Miguel, Statistician; Dr. Lydia Killos, Evaluator.** A third member **Edison Coronado, Data Integrity Analyst,** rounds out the R&A team. They will be collectively responsible for the evaluation of **Good to Great.** Their bios are attached in **Appendix B.**

<sup>6</sup> The SDP Fellowship is a highly competitive two-year professional development program that places data strategists in education agencies to immediately impact policy decisions that affect student outcomes.

The TSLIP evaluation will accomplish the following: 1) Describe the development and fidelity to all program activities associated with the TSLIP project, including expanding what works in new regions, talent development, Compass talent management platform and retention strategy, Roadmap exemplary practices digital library, and Coaching Accelerator; 2) Identify and compare strategic elements of the development and implementation of all TSLIP project activities by the network as a whole and by region to best understand and scale what works to meet the conditions to retain the best teachers and promote great teacher who want to pursue school leadership, across IDEA and in new schools and new regions; and 3) Compare and contrast teacher retention and development, student persistence and college readiness outcomes between regions, as guided by the research questions below.

RESEARCH QUESTIONS
1. To what extent does IDEA Public Schools adhere to the implementation of key model elements of the TSLIP project activities? How, if at all, does implementation of the noted activities differ between Academy and College Prep campuses, by school maturity (years in operation), and by region?
2. What are schools' and regions' greatest needs for support in engaging in TSLIP program activities? In what ways are challenges different based upon regional differences and school identification as "high-need"?
3. Which supports provided by IDEA HQ or regional offices facilitate the implementation of the TSLIP program model and in what ways? To what extent do schools and regions use the supports available? To what extent do supports meet the schools' and regions' needs to inform human capital decisions; recruitment; hiring; placement; retention; dismissal; professional development; tenure and promotion?
4. To what extent do schools and regions build TCP sustainability strategies, including teacher retention and promotion, and what is the nature of those strategies?
5. To what extent are TSLIP project activities associated with anticipated outputs, including: student persistence, academic progress and success; teacher retention and development along the TCP pipeline; development of teachers into leaders and internal promotion of school leaders to principals?
6. To what extent do these outcomes vary by school and region engagement in TSLIP project activities, including teachers' and leaders' use of such advancements as Compass talent management platform, Roadmap exemplary practices digital library, and embedded activities as sustainability interviews? ?

### *Metrics*

As it has done since 2005, the Senior Leadership Team (SLT) will track organization-wide goals and targets, a subset of which are included as **Good to Great metrics** in the Logic Model under **Outputs (page 26)**. The R&A team will also track data to report on **specific program performance measures (GPRA)** over the three-year project period. Data types, instruments and

systems, and frequency of data analysis as follows:

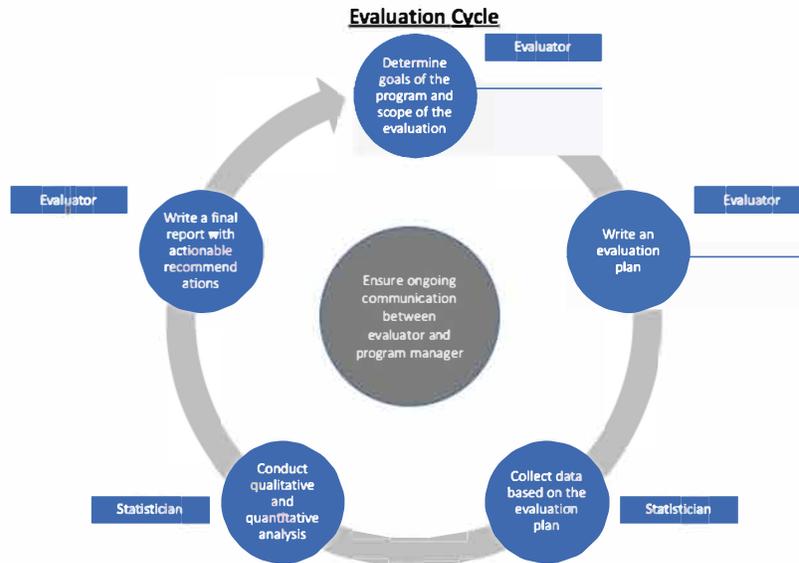
GOAL/METRICS	DATA TYPE	INSTRUMENTS/SYSTEMS	FREQUENCY
<b>Goals 1, 2, and 4 All metrics</b>	School and district operations, including staffing and teacher retention and promotion, leadership retention.	Compass Talent Management Platform; TCP; GPTW organizational health; TeachBoost measure of school culture; de-identified HR records	Compass: 30 to 45-day rapid evaluation cycle Other Measures: MOY, EOY Annually
<b>Goals 2 and 3 All metrics</b>	Student achievement data, including college readiness	Diagnostics for Math and ELA Reading Level Interim Assessments ACT, AP, STAAR and EOC tests	Beginning of Year, Middle of Year, End of Year Weekly Quarterly Annually
<b>Goals 3 and 4 All metrics</b>	College application, financial aid, enrollment, matriculation, persistence	Naviance, National Clearinghouse	Weekly for high school juniors and seniors, each semester for alumni
<b>Goals 2, 3, and 4 All metrics</b>	School and district achievement, State rating, AP Scholars, teacher retention, teacher and student attendance, student persistence	Public Education Information Management System (PEIMS); College Board (AP); HR records; student enrollment	Daily (attendance); annually (all other metrics); regular check-ins on progress towards organizational and individual teacher and leader goals

The timeline for producing reports is as follows: **Quarterly:** Collect formative data to facilitate decision-making; **Annually:** Produce an annual evaluation report on all project components, including preliminary and key findings, an explanation of changes in goals, objectives, and methodology; and planned products or publications; and **End of Grant Period:** Cumulative final report summarizing the results of the entire TSLIP/*Good to Great* project. The team’s dissemination plan for sharing learning includes Charter School Growth Fund convenings, webinars, practitioner briefs, and policy briefs as well as through annual Project Director meetings and site visits hosted in IDEA’s various regions. IDEA will also share information through its Scaling Up Institute (see **Appendix D.15**), an experiential professional development program designed to accelerate the growth and academic impact of charters across the country. The six-month program is open to charter schools and traditional public schools and convenes cohorts of 5-6 executive teams at three in-person workshops centered around an Action

Learning Project (ALP)—a transformative, mission critical initiative that increases student outcomes. At IDEA, the ALP model has launched over 75 initiatives in the last 7 years.

### ***Research Design Overview***

**Evaluation cycle and data to be collected.** In order to continue to learn through growth in new markets, IDEA will follow a robust evaluation cycle as depicted in the following graphic.



IDEA will use mixed qualitative and quantitative methods that produce an in-depth understanding of the use of a comprehensive talent management platform, innovative teacher retention strategies, a digital library of exemplary practices, and personalized content coaching in replicating IDEA’s model of student academic success. Qualitative research methods will include surveys, focus groups, interviews involving IDEA leadership, teachers, parents and students, as well as observations of key program activities such as teacher professional development and training, classroom instruction and personalized coaching activities. Descriptions of key research components follow.

**Site Visits of Replication, Expansion, and Mature Schools.** IDEA’s internal evaluation team will conduct site visits to mature, expansion and replication schools in years 2-3 expanding

the sample as new schools are established while the R&A team ensures there is no overlap with existing studies to enable the widest scope of review and recommendations. In this way IDEA can iterate on its model, ever scaling successful teacher retention and development practices to new schools and new regions, growing teachers from good to great in every region, and creating conditions to retain the best teachers who want to stay in the classroom and promote from within the great teachers who want to pursue school leadership. In this way, IDEA expands its model designed to increase student academic achievement in growingly diverse communities. Site visit activities will include interviews and focus groups with key school stakeholders [i.e., leadership, teachers, students, and parents] and classroom walkthroughs to better understand whether and how model implementation and replication is associated with factors that facilitate or impede progress towards TSLIP program goals.

**Teacher, Parent and Student Surveys.** IDEA will continue to develop and iterate on survey items measuring key constructs related to understanding, clarity and scaling of what works in existing schools into new schools and new regions. IDEA school model and growth strategy for new campuses and will compare information gathered to that from other campuses established earlier, with the goal of determining whether schools', students, teachers and leaders are having a more positive experience in the classroom and in the school building, and are encountering greater support and fewer obstacles to advancement. To minimize burden on IDEA, survey items developed in collaboration with Panorama Education, will be integrated with IDEA's annual teacher, student and parent surveys in years two and three. The R &A team will analyze this data to share the progress towards identified goals of the TSLIP project study, including highest quality talent development and retention, by school maturity, elementary/ secondary levels, and region.

**Descriptive Student Outcomes Analysis.** In years 2020-2023, IDEA’s R&A team will analyze leader and teacher promotion, retention and efficacy metrics, teacher and student attendance, persistence, and performance on benchmark exams. They will also analyze test data by school maturity, region, and student subpopulations to compare school-level results to schools serving similar students in the IDEA regions.

**Performance feedback and assessment of progress towards outcomes.** The R&A team will provide formative feedback after completing site visits and surveys in years 2-3 to inform IDEA’s Teacher and School Leader Incentive Program strategies, as well as summative reports describing implementation and performance data. Data collection, analysis and delivery will be conducted in several “rapid-cycle” sessions, in which the qualitative data collection, analysis and formative reporting all occur within a 30-day period. Because growth will continue beyond the TSLIP grant period, it is important that IDEA build systems that provide a rapid cycle of both qualitative and quantitative data collection and analysis so they can respond to and resolve issues quickly, duplicate best practices across regions, and ensure that all IDEA schools meet IDEA standards. For example, feedback loops will include analyses of Compass data at regular, 6 to 8-week intervals. Analyses will be shared with school leaders at Principal meetings. Regional differences will be disseminated during bi-annual Executive Leadership Council meetings, which include all IDEA VPs and school Principals.

Each report will include implementation findings, descriptive statistics associated with the proposed measures and the impact analysis for teacher and student cohorts. In the last year of the grant, the cumulative findings on lessons learned about the innovative TSLIP/*Good to Great* project, as well as use and learning from the Compass and Roadmap platforms, and personalized content coaching in new schools and new regions will be shared with practitioners, school and

district leaders, and policymakers through a range of accessible products and in-person opportunities as noted on **page 38**.

IDEA’s successful project evaluation experience demonstrates a commitment to implementing programs with fidelity, improving its practice, and documenting the results such that others can learn from IDEA’s experiences. The continued investment in the R&A team also signifies the value IDEA places on data-driven decision-making and on conducting high-quality, systematic research that will produce high quality data to inform CMO-wide decision making, grow and retain exceptional teachers and leaders in every region, in every school, across all grades, and, ultimately, improve academic outcomes for its students.

### C. High-Quality Management Plan

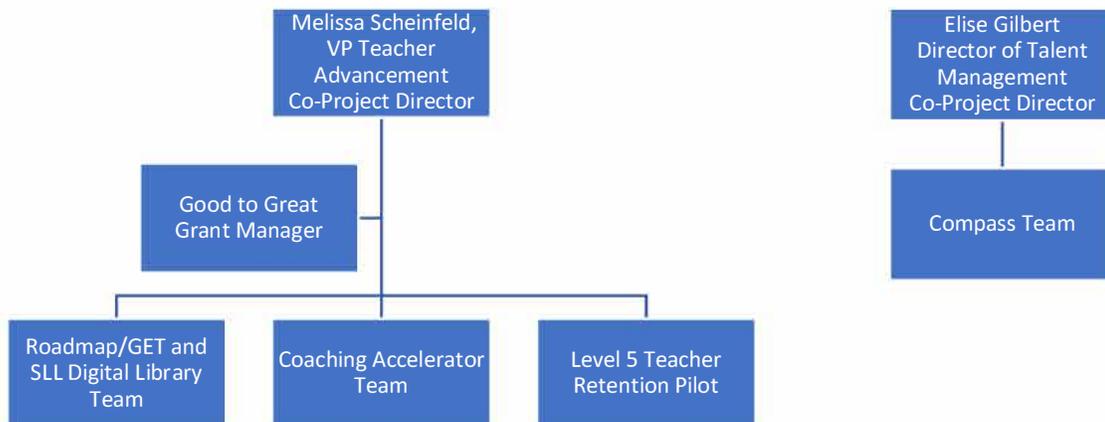
IDEA will **achieve the objectives of *Good to Great: Transforming Teaching and Learning at IDEA Public Schools*** on time and on budget with established processes and an experienced management team. The following key personnel will assume responsibility for the smooth operation and integration of ***Good to Great*** into IDEA’s existing and related Human Capital Management and Performance-based Compensation System efforts.

**Melissa Scheinfeld, IDEA’s Senior Vice President of Talent Development**, will serve as one of two **Project Directors** for ***Good to Great***. She will identify, hire, and supervise the work of the ***Good to Great Project Manager***, who will manage the day-to-day work of three of the four main components of this TSLIP initiative: the Roadmap/GET and SLL Digital Library and Coaching Accelerator efforts and the Level 5 Teacher Retention Pilot. In her current role, Melissa manages a team of 10 regional coaches and four national program directors and managers who lead programs focused on teacher quality and teacher retention. Programs for which she is responsible include the Teacher Career Pathway and Teacher Residency—both of

which she designed; New Teacher Institute; Instructional Coaching program; and Teacher Laureates.

**Elise Gilbert, IDEA’s Director of Talent Management, will co-direct *Good to Great*.**

Among the responsibilities of her current role, Elise is accountable for collaborating with the data and information departments and cross-functional teams to successfully project-manage the data analysis and data warehousing so that the organization as a whole can understand its internal talent needs, strengths, and opportunities. This accountability positions her perfectly to oversee the building of Compass, the district’s single talent management platform that will aggregate data from multiple existing sources (HCMS and PBCS—see **page 9**).



Please see **Appendix B** for the IDEA Scorecards (job descriptions) for all new positions to be hired with TSLIP funding as well as for the resumes of all IDEA staff named in this section.

Additional key personnel for ***Good to Great*** are as follows:

**Alexandria Saldivar, IDEA’s Director of Teacher Career Pathway,** is responsible for placing 100% of teachers on the TCP by early October each year. She ensures that all relevant organizational data is identified, communicated, collected, and processed on the TCP Dashboard and partners with cross-functional teams including Talent Development, Teacher Advancement, Software Development, Schools, Business Office, Compensation, and Academic Services. Prior

to her current role, Alexandria served IDEA as Teacher Advancement Team Manager (2016-2017), and TCP Coordinator (2014-2016). **During the project period, Alexandria will partner with the co-Project Director to align the talent management programs with the TCP, assure that all TCP data imported into Compass is accurate, assure teachers are placed and promoted along the TCP with fidelity, and support individual campuses as needed. She will devote 33% of her time to *Good to Great* activities.**

**Cody Grindle, IDEA's Senior Vice President of Information Systems**, is charged with advising the executive office and leading technology and product strategy for the organization. Cody is the founding and executive member of Data Whiz Community, leading collaboration with other charter schools and public independent school districts around data interoperability and business intelligence. **During the project period, Cody will lead the programmers and designers to ensure the technical components of Roadmap and Compass are designed to accomplish the outcome for each system. Cody will partner with the Human Assets to beta test the functionality before it is released to the end user. He will devote 50% of his time to *Good to Great* activities.**

To facilitate **program evaluation**, the Project Director, in partnership with IDEA's highly qualified Research and Evaluation Team, will communicate with the district's Senior Leadership Team and others in supporting roles to gather, analyze, and report on data to measure **progress toward project goals, objectives, and outcomes**. As with past successful Federal program grants, IDEA's Research and Evaluation team will provide comprehensive evaluation services for this TSLIP initiative as well.

**Unique to IDEA and its grant management model is the GrantEd Team**, which seeks to ensure that all grant managers at IDEA Public Schools have the tools, resources, and knowledge

to ensure fidelity of program implementation and financial management of grant funded projects across the district. GrantEd is a team of 15 grant managers who meet quarterly to problem-solve, share best practices in grant management, and learn from one another's projects and efforts. Led and coached by IDEA's Grants Director and supported by IDEA's Business Office leaders, **this group has been highlighted multiple times at US Dept. of Education conferences.** GrantEd also teaches grant managers ethics in decision-making, strategic budget planning, and navigating partnerships. Together, the GrantEd Team supports the management and implementation of 15 state, federal competitive, and federal formula grants totaling over \$150M in awarded funds. The Project Director will maintain membership on the GrantEd Team for grant management-related professional development.

***Clearly defined responsibilities, timelines, and milestones for accomplishing project tasks***

The following table illustrates the key **project management** activities, responsibilities, timelines, and milestones for this Teacher and School Leader Incentive Program that will ensure fidelity to the IDEA Human Capital Management and Performance-based Compensation Systems, adherence to the ***Good to Great*** grant program budget, and the timely accomplishment of all program goals and objectives. **Items will repeat annually throughout the grant with the exception of items marked with an asterisk (\*)** that are one-time activities. Following that is the timeline for data collection to measure progress toward project objectives and outcomes.

MAJOR PROJECT MANAGEMENT ACTIVITIES AND MILESTONES	POSITION(S)	TIMELINE
Announce notice of TSLIP grant award to IDEA learning communities*; meet with stakeholders (board, district and school leaders, Teacher Laureates, Teacher Advisory Council, and others) to review goals, objectives, activities, project metrics, and budget as appropriate	Superintendent and Senior Leadership Team (SLT)	October 2020
Formally designate TSL Project Co-Directors (PD) to be responsible for compliance and reporting related to this initiative	Superintendent	October 2020

MAJOR PROJECT MANAGEMENT ACTIVITIES AND MILESTONES	POSITION(S)	TIMELINE
Hire new full time employees to execute and lead initiatives outlined in the TSL grant ( <i>Grant Manager; Evaluator; Statistician; Compass Project Manager; Data Integration ETL Developer; Full Stack Developer; Roadmap Project Manager; Director, Digital Content Curation &amp; Strategy (Leaders); Director, Digital Content Curation &amp; Strategy (Teacher); Regional Directors of Instructional Coaching</i> )	Project Director (PD) /VP of Teacher Advancement	October - December 2020
Conduct grant kick-off call to begin implementation planning with business office, Managing Director of Research and Analysis (R&A) Team, Grant Manager, Sr. Leadership team (SLT), VPs of Schools and Regional EDs, Manager of GrantEd Team	PD and Development team	October 2020 and at beginning of fiscal year (July annually)
<b>MILESTONE: Project Staffing Complete</b>		
Establish data-gathering and reporting procedures, timelines, and methods; align with other existing TCP/organizational processes and protocols in place	PM and R&A Team	October 2020; monthly alignment
Update baseline demographics and other data, including Great Places to Work baseline data for grant year 1	PM	October 2020; Sept/Oct annually
Consult with district teams to implement and actualize <b>Good to Great</b> project plan: Talent Development, Teacher Advancement, IT/Software Development, Schools, Business Office, Compensation, and Academic Services	PM; VP IT	Ongoing; at least quarterly
Conduct data gathering for project evaluation (see Section B(i) for data collection table and schedule)	R&A Team with support from Co-PDs and PMs	As appropriate to each instrument(s)
Outline plan and timeline for development of Compass/HMCS single development talent management platform. <b>Anticipated plan:</b> 1/1/21 - <i>Minimum Viable Product (MVP) Launch (Staff Profile)</i> ; 3/15/21 - <i>Quarterly Review - Data from users, feature requests, and bugs</i> ; 5/15/21 <i>Phase 1 Launch &amp; Iterative Improvements Complete</i> ; 6/1/21 <i>Phase 2 Discovery - Staff Journey Mapping</i> ; 1/1/22 <i>Phase 2 Launch</i> ; 3/15/22 <i>Quarterly Review - Data from users, feature requests, and bugs</i> ; 5/15/22 <i>Phase 2 Launch &amp; Iterative Improvements Complete</i>	Co-PD and IT	<b>Outline Plan:</b> November-December 2020  <b>Anticipated Plan:</b> January 2021 – May 2022
Prioritize components of GET and SLL Rubrics for digital library video recordings and artifact compilations	Roadmap PM and team	January 2021
Record Master Teacher and high-performing Principal actions; catalog and link to GET and SLL Rubrics	Roadmap PM and team	January 2021 through year 3
Identify Level 5 Teachers for Retention Pilot	PD	January 2021
<b>MILESTONE: Project Systems, Baselines, and Targets Established</b>		
Purchase/receive/store/distribute/install supplies, materials, and equipment to support project implementation	PM	Ongoing
Complete annual interim financial and management	PM, R&A	Q2, Q4 or

MAJOR PROJECT MANAGEMENT ACTIVITIES AND MILESTONES	POSITION(S)	TIMELINE
reports; share with stakeholders via board meetings		as required each year
School leaders and teacher/instructional leader access and participate in asynchronous (Roadmap) training and development offerings as appropriate	Supt, VPs of Schools, EDs	January 2021 and ongoing
Begin annual budget cycle with all schools and departments for upcoming school year	CFO and team	Q3 each year
Hire new teachers and staff for upcoming year	Human Assets/Talent Acquisition Team; School Principals	Q3-Q4 each year
Disseminate results of TSLIP project to US Dept. of Education, local stakeholders, education/business/community partners, and others as appropriate	PD, PM, Business Office	Q4 or as required each year

#### D. Adequacy of Resources

##### *(i) Good to Great has been designed to result in system changes and improvements*

This entire TSLIP project has been designed to free IDEA staff from the time-consuming burden of tracking down human capital management and performance-based compensation data from disparate places, to empower teachers to design their own career pathways once they have access to the totality of their human assets data, and to increase the quantity and quality of teaching across the IDEA Public Schools network so as to further improve student achievement for IDEA’s high-needs, low-income student population. The architects of the ***Good to Great*** program components proposed here—**Compass, Roadmap/GET and SLL Digital Libraries, Coaching Accelerator, and Level 5 Teacher Retention Pilot**—are all district leaders with direct accountabilities for these systems who understand that, without a commensurate increase in student achievement, changes to district systems are meaningless.

IDEA Public Schools is a learning organization, and it maintains dozens of metrics to measure progress toward its organizational goals. Everything IDEA does focused on student outcomes, which is the ultimate measure of success to system changes and improvements.

*(ii) Good to Great will build local capacity to provide, improve, or expand services that address the needs of the target population*

The following table summarizes how each major component of **Good to Great** will build local capacity to provide, improve, or expand services that address the needs of teachers and leaders at IDEA Public Schools:

<p><b>PROJECT SOLUTION: COMPASS (HCMS)</b></p> <p>Teachers and Co-teachers will have access to their hiring, employment, performance, and career information. They will have a new capacity and the agency to design their futures at IDEA.</p> <p>Managers will have a complete performance snapshot for every member of their team</p> <p>Teacher Managers/Supervisors/School and District Leaders have the capacity to view and query HCMS data and to make more efficient and effective internal promotion and succession decisions more quickly.</p>
<p><b>PROJECT SOLUTION: ROADMAP (Learning Platform); GET Digital Library, SLL Digital Library</b></p> <p>High quality, <b>location-independent professional development</b> with multimedia integration and support; asynchronous (anywhere, anytime) access <b>builds organizational capacity</b> to support an exponentially growing staff body across multiple regions and schools</p> <p>Builds capacity of <b>teachers</b> to model the intellectual preparation, actions, and reflection on results of higher-performing peers</p> <p>Builds capacity of <b>teacher managers/supervisors</b> to model high-performing coaching actions, especially with unfamiliar content during "See it Name it Do it" Data Conversations (see <b>Appendix D.16</b>) that require the coach to model or to show an exemplar to the teacher to then rehearse. Having best practice videos across content areas to embed in coaching conversations <b>accelerates the development of teachers to adjust behaviors and increase student achievement</b></p>
<p><b>PROJECT SOLUTION: COACHING ACCELERATOR</b></p> <p>Builds the capacity of teachers through direct, in-field coaching of leaders (Assistant Principals of Instruction), who become the leader bench for IDEA as the network grows</p> <p>Strong teacher coaching from teacher managers → Increased teacher knowledge/mindset/skills → Targeted teacher actions → Improved student achievement</p>
<p><b>PROJECT SOLUTION: LEVEL 5 TEACHER RETENTION PILOT</b></p> <p>Retaining top performers on a campus <b>builds mentorship and instructional leadership, collegiality, and exemplary relationships with students, parents, and colleagues.</b></p> <p>Retaining top performers on a campus also <b>increases student achievement and retention of peers on their team.</b></p> <p>Level 5 teachers are given additional discretionary professional development budgets to pursue their own professional interests, further <b>building their capacity to get better student achievement results</b></p>

*(iii) IDEA has the resources to operate the project beyond the length of the grant*

IDEA Public Schools is a fiscally sound and responsible local education agency (LEA) with sufficient management capability—including a senior leadership team to support the growth of its highly successful charter school model while steadily and simultaneously increasing student achievement.

**Multi-year financial and operating model and accompanying plan**

IDEA Financial Projection Model	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26
State	629,069,327	782,159,216	964,459,575	1,141,584,716	1,329,587,151	1,495,126,735
Federal	61,840,092	77,071,207	95,392,092	113,183,837	132,074,397	148,702,521
Committed Philanthropy & Fundraising	31,621,690	19,448,870	6,699,364	3,018,182	645,000	620,000
<b>TOTAL REVENUE</b>	<b>\$ 722,531,103</b>	<b>\$ 878,679,293</b>	<b>\$ 1,066,551,031</b>	<b>\$ 1,257,786,735</b>	<b>\$ 1,462,306,548</b>	<b>\$ 1,644,449,256</b>
Total Operating Expenses	\$ 543,094,763	\$ 684,564,528	\$ 843,067,686	\$ 996,094,202	\$ 1,156,747,302	\$ 1,297,416,589
Facilities Expenses	73,883,491	95,429,068	120,827,851	142,571,256	162,182,861	173,020,337
HQ and Regional Expenses	28,802,546	29,439,409	17,087,107	(2,434,955)	(14,443,456)	(30,588,638)
<b>TOTAL EXPENSES</b>	<b>645,780,801</b>	<b>809,433,006</b>	<b>980,982,644</b>	<b>1,136,230,503</b>	<b>1,304,486,708</b>	<b>1,439,848,289</b>
Debt Service (Principal and Interest)	50,491,264	65,404,838	84,813,915	105,177,554	124,213,998	138,094,917
EBITDA	\$ 150,633,800	\$ 164,675,355	\$ 206,396,238	\$ 264,127,488	\$ 320,002,701	\$ 377,621,304
Net Income	\$ 76,750,309	\$ 69,246,287	\$ 85,568,387	\$ 121,556,232	\$ 157,819,839	\$ 204,600,967
Net Income % of Revenue	11%	8%	8%	10%	11%	12%

*\*The above projections reflect IDEA's work across Texas. Net income ensures we have at least 140 days of cash on hand to maintain our strong financial rating, continue operations for students and families and cover payroll in the event of a revenue emergency. Income is also deployed to support programmatic innovations that are determined on an annual basis.*

#### Develop HCMS Talent Management Platform: Compass

- Compass will continue to be utilized and the work to make product improvements will be led by the Director of Talent Management. The Software Development Team will continue to support in the maintenance and update of the Compass Program. The compensation and supporting expenses for these staff members will be funded by recurring state revenue.

#### Learning & Development: [Digital Best Practices Library] Roadmap

- The development and utilization of the curated digital library will continue to be utilized by instructional staff. The Teacher Advancement Team will continue to update digital content and artifacts. The cost of user licenses will be funded by recurring state revenue.

#### Learning & Development: Coaching Accelerator

- The Coaching Accelerator will continue through the work of the Leader Development Team funded by recurring state revenue. Their compensation and supporting expenses will be supported by recurring state revenue. In instances where a new region is starting up, the Accelerator may be supported by philanthropic revenue or grants funds dedicated to supporting new and scaling high performing schools.

#### Retention: Level 5 Teacher Pilot

- There is no additional cost to create the conditions for the Level 5 Teacher Pilot

#### Teacher and School Leader Incentive Program

- The projects supported by this grant will be evaluated and improved through the course of the grant term. IDEA prioritizes the development, recognition and retention of its staff and will continue to fund programs shown to have a high impact on student achievement, in alignment with IDEA's mission to close the education gap. IDEA has the capacity to sustainably continue projects that have a strong impact on staff and student success.

IDEA goes through a budget setting process annually with Chiefs and Executive Directors to determine organization priorities. The budget reflects the priorities of the organization and funds are prioritized to the highest-impact areas. The support from the CEO, Chiefs and Executive Directors, as evident in the attached letters, demonstrate the commitment from senior leadership to invest in building out and sustaining the Human Capital Management System improvements with state revenue. The HCMS initiatives outlined in this grant will allow IDEA to improve processes and determine what works, what doesn't and prioritize next steps to increase student

achievement by sustaining best practices learned through the implementation of this grant work. In October 2019, IDEA Public Schools announced that its bond rating had been upgraded to an A- from BBB+ from the bond rating agency, S&P Global (S&P), **the highest unenhanced bond rating for a charter school nationally.**

Additionally, IDEA’s 2018-19 FIRST rating (Financial Integrity Rating System of Texas) from TEA was “A-Superior” with a score of 90 (passing score was 60). See **Appendix D.17** for IDEA’s FIRST Rating report, and see **Appendix D.18** for IDEA’s 2022 Strategic Plan.

***Demonstrated commitment of project partners***

***Good to Great*** has no external project partners.

***Evidence of broad support from stakeholders critical to the project’s long-term success***

IDEA is pleased to present in **Appendix C** letters of support from its **National Board Chair, CEO and complete Chief Team, every Texas regional leader, Teacher Laureates and members of the Teacher Advisory Council.** IDEA is especially grateful for the support of the Teacher Laureates and Teacher Advisory Council, which represents **the voice of teachers from across the district.** Teacher Laureates are the highest-performing teachers at IDEA—TCP Level 5 that participate in a year-long fellowship. Nearly two hundred Level 5 teachers have completed a Teacher Laureate fellowship across all IDEA Texas schools. The Teacher Advisory Council includes teachers from across the district that convene twice a year (in October and March) to engage with the Teacher Development Team. IDEA knows that the decisions that are made every day in all departments impact teacher and students, and therefore, impact students’ academic success. With the input of representative teachers, organizational decisions can be more aligned with teacher beliefs and teacher feedback. The Council’s support for ***Good to Great*** is crucial to the project’s success.