**Mathematics**

**Session 1: Developing Criterion-Based Feedback and Ratings**

**Facilitator’s Notes**

**Intended Audiences:**

* New reviewers
* Reviewers who wish to deepen their ability to use EQuIP criteria and rating scales to review the quality and alignment of instructional materials

**Prerequisite Knowledge:**

* Common Core State Standards (CCSS) for mathematics

**Time:**

Unit Review:3–3.5 hours

Lesson Review: 2–2.5 hours

Note: Reviewers should review the common instructional materials independently a day or so BEFORE the review session.

**Materials Needed:**

1. Session 2 PowerPoint slides (contains slides for unit and lesson review)
2. A copy of the common instructional materials for each reviewer. Choose from:
* Unit: Operations with Rational Numbers 7th grade
* Lesson: 7.NS.1
* Instructional materials from the state, district or school
1. Quality review process steps handout for each reviewer
2. Quality Review Rubric PDF (electronic or print) for each reviewer
3. Criteria Discussion Guide for Mathematics
4. Copies of the CCSS for mathematics for each table (reviewers may also use e-versions)
5. Copies of CCSS Standards for Mathematical Practice for each table (reviewers may also use e-versions)

**Session Goals:**

* Develop reviewers’ ability to use EQuIP quality review rubrics to provide criterion-based observations and suggestions for improvement
* Develop a common understanding of alignment and quality among reviewers
* Develop a common understanding of the rating scale and descriptors for the four rubric dimensions and the rating scale and descriptors for an overall rating
* Develop reviewers’ abilities to use EQuIP criteria, rating scales and rating descriptors to review instructional materials

**Session Overview:**

In Session 2, a group of reviewers practices providing criterion-based feedback that reflects the evidence found in a CCSS lesson or unit *and* applying ratings using the EQuIP quality review process. During early reviews, the primary goal is to familiarize reviewers with the process of rating and the relationship between rating for each dimension, the overall rating and the criteria in each dimension.

When reviewers are engaging in Session 2 for the first time, review the rating scales during the review of each dimension.

Throughout the review, the facilitator will use the EQuIP quality review rubrics and a set of guiding questions[[1]](#footnote-1) to help reviewers frame their observations, ratings and discussions for each dimension. As reviewers examine a common set of instructional materials, the facilitator will engage reviewers in a comparison of their observations, suggestions and ratings, always emphasizing the use of the criteria to frame or explain. Each reviewer will:

* Look for evidence in the common instructional materials that addresses each criterion of the rubric;
* Determine if the example meets the criterion or not;
* Rate each dimension; and
* Compare his/her criterion-based observations, suggestions and ratings for each dimension to those of other reviewers.

The facilitator may use the instructional materials provided or other state, district or school instructional materials. Note that the PowerPoint slides may need to be revised to reflect the common lesson/unit that is chosen. Review teams may range in size from four to eight members. Conduct reviews at tables that allow for unobstructed conversation and have enough space for materials.

**Part One — Introducing the Review** (Slides 1–13)

**Time: 15 minutes**

These slides present:

* + Session 2 goals;
	+ EQuIP quality review principles and agreements;
	+ Review process and four dimensions;
	+ Quality Review Rubric PDF;
	+ Qualities of Effective Feedback and examples of feedback; and
	+ Steps of the EQuIP quality review process.

Review slides 1–8 to introduce the session. In these slides, reviewers will learn the purpose of Session 2 (goals) and the ways in which a reviewer engages in a review (principles and agreements). Explain that adhering to the EQuIP principles and agreements creates a collegial environment in which reviewers can develop criterion-based suggestions for improving the alignment and quality of instructional materials. Read all of the principles and agreements.

Part One also provides an opportunity for an overview of the four domains of the EQuIP rubric(s) and the five steps of the review process itself. Pause on slide 4 to allow reviewers to scan the four dimensions of the rubric. Slides 5 and 6 explain using the EQuIP Rubric Quality Review Feedback Forms. The feedback forms are organized by Dimension, with Dimension I being on the first page and subsequent dimensions on the following pages. Each page in the form allows the reviewer to indicate the criteria that the lesson or unit met, a space to provide criterion-based feedback, and a space to assign a rating to the dimension. The last page of the form is used by the reviewer to assign the lesson or unit an overall rating and summary comments. Slides 7-11 explain the qualities of effective feedback and allow participants to engage in evaluating sample feedback based on the qualities of effective feedback. Instruct the participants to read the criteria in Dimension I. Read the sample feedback on slide 8 aloud to the group and then have the participants consider if the feedback meets the qualities of effective feedback. Slide 9 provides an explanation of how Achieve assessed the sample feedback based on the qualities of effective feedback. Repeat this process for slides 10 and 11. Slides 12 and 13 outline the review steps.

Before beginning Part Two, facilitators should introduce reviewers to the materials used during the session (see Materials Needed, above). If reviewers have not already introduced themselves, they should do so at this time.

**Part Two — Review Process:**

**Step 1. Review Materials** (Slides 14 and 15)

**Time: lesson, 15 minutes; unit, 20 minutes**

During Step 1, reviewers should *not* try to read every word of the lesson/unit from start to finish but rather get an overall sense of what is contained in the instructional materials. It is particularly important that reviewers study and work the tasks that are central to instruction. Use slide 15 to summarize key parts of the instructional materials, including notes on the key tasks. Slide 15 will increase the likelihood that reviewers are thoroughly oriented to the instructional material and are able to locate key information during the session. Explain that reviewers should not use the EQuIP rubric(s) during Step 1. Reviewers will have ample opportunity to think deeply about the criteria in each dimension during subsequent steps of the review process.

**Step 2. Apply Criteria in Dimension I: Alignment** (Slides 16–20)

**Time: lesson, 20 minutes; unit 25 minutes**

Read the criteria for Dimension I. Reviewers should:

* Select the checkbox for the criteria for which there is clear and substantial evidence in the instructional materials.
* Leave the checkbox blank if there is insufficient or no evidence of a criterion.
* Record input on specific improvements needed to meet criteria or strengthen alignment.
* Enter a rating of 0–3 for Dimension I.

Each team member should engage in the criterion-based analysis and rating of the example’s CCSS alignment *individually* (and silently) before any discussion occurs. As the team(s) review, the facilitator should circulate and use the following kinds of questions to support reviewers at their tables:

* What direct evidence can I cite that supports my decisions?
* For criteria not yet met, what constructive observations and suggestions for improvement can I make?
* Can I connect my observations and suggestions to specific evidence from the instructional materials (both what I see and do not see)?

As reviewers apply the criteria in **Dimension I,** it is helpful to ask the following questions regarding criteria 1, 2 and 3:

* + For criterion 1: Does the teacher/developer articulate alignment to a reasonable set of standards? Do the assignments, tasks and activities suggest that a set of standards has been targeted for instruction? Does the teacher/developer make a distinction between targeted and supporting standards? Do the assignments and activities make sense given the standards listed?
	+ For criterion 2: Which Standards for Mathematical Practice are identified? Which mathematical practices do the assignments and activities provide opportunity for student to demonstrate?
	+ For criterion 3: Do the assignments and activities present opportunities for students to practice mathematical procedures and deepen the emphasized concepts for the grade level?

After reviewers have checked the criteria and recorded observations, discuss their feedback as a group. Ask tables to share reflections with the room. *Use the examples of criterion-based feedback and ratings in the slide deck to guide reviewers to reflect on the observations, feedback and ratings they have generated.* Compare both the degree to which observations are based on the examples found in the common lesson/unit and the degree to which the suggestions are framed in the language and spirit of the criteria. Explain that criteria may be checked only if there is clear and substantial evidence of the criterion (there are no “half-checks”). There may be instances when reviewers find clear and substantial evidence of a criterion and constructive suggestions still can be made. In such cases, reviewers may provide feedback related to criteria that have been checked. In addition, explain that because the number of criteria varies across dimensions, reviewers will need to use professional judgment when applying rating scales for each dimension.

Before moving on to Step 3, note that Dimension I is non-negotiable. For the review to continue, a rating of 2 or 3 is required. If the review is discontinued, provide general feedback that can be shared with developers/teachers regarding next steps.

**Step 3. Apply Criteria in Dimensions II–IV** (Slides 21–39)

**Time: lesson, 45 minutes; unit, 65 minutes**

If reviewers are learning to use the EQuIP quality review process for the first time, facilitators should stop to discuss and compare the observations, suggestions and ratings made by reviewers to the examples of observations, suggestions and ratings provided in the slide deck. If the group of reviewers is experienced, facilitators may delay conversation until reviewers have recorded their input for Dimensions II–IV.

As reviewers apply the criteria in **Dimension II,** it is helpful to ask the following questions regarding criteria 1 and 3:

* For criterion 1: Does the content align with the Common Core emphases for the grade? If these types of questions are present, reviewers should check the criteria. There may be instances when reviewers find clear and substantial evidence of a criterion and constructive suggestions still can be made. In such cases, reviewers may provide feedback related to criteria that have been checked.
* For criterion 3: How do the instructional materials present a balance of application, conceptual understanding, and procedural skill and fluency?

As reviewers apply the criteria in **Dimension III,** it is helpful to ask the following question regarding criterion 2:

* Does this set of instructional materials clearly identify and work to develop key vocabulary?

In **Dimension III,** there is an important distinction to be made between criterion 3, which is primarily about opportunity, and criteria 5–8, which are primarily about access.

* Note that criterion 3 asks reviewers to look for evidence that all students are given opportunities to engage with the central text with scaffolding that preserves the complexity of the text. Although this criterion has a close relationship to criteria 5–8 criterion 3 *does not require*evidence of scaffolds that are specific to special learning or language needs. Rather, criterion 3 asks for evidence that all students are expected to and given opportunity to do challenging mathematical work.
* Note that criteria 5–8 *do require* evidence that the developer/teacher has included supports that address a range of learning and language needs.

*Checking the criteria in a manner that accurately reflects the evidence in the instructional material will help reviewers to provide criterion-based feedback.*

As reviewers apply the criteria for **Dimension IV,** it is helpful to ask the following question regarding criterion 2:

* Do students have multiple ways to show what they have learned?

For **Dimension IV,** criterion 3, clarify that reviewers should look for evidence that assessment produces a description of how close students have come to meeting expectations (e.g., annotated student work, descriptive rubrics/checklists).

**Step 4. Apply an Overall Rating and Provide Summary Comments** (Slides 40–41)

**Time: lesson, 20 minutes; unit 25 minutes**

Review the scales for overall ratings. Explain that the EQuIP rubrics have a numeric scale that helps reviewers synthesize ratings for the dimensions and a descriptive scale that explains the overall rating. Reviewers should provide summary comments and apply overall ratings *individually* (and silently) before any discussion occurs. Reviewers should record the overall rating on the Quality Review Rubric PDF. *Use the examples of criterion-based feedback and ratings in the slide deck to guide reviewers to reflect on the feedback and ratings they have generated.* Compare both the degree to which observations are based on the examples found in the common unit and the degree to which the suggestions are framed in the language and spirit of the criteria.

**Step 5. Compare Overall Ratings and Determine Next Steps** (Slide 42)

**Time: lesson, 15 minutes; unit 20 minutes**

During group discussion, note the evidence cited to arrive at final ratings, summary comments, and similarities and differences among reviewers. Reviewers can compare ratings by a show of hands. The goal of this step is to recommend next steps for the lesson/unit and provide recommendations for improvement to developers/teachers. Participants may finalize summary observations after discussion.

**Reflect on Session Goals** (Slide 43)

**Time: lesson, 15 minutes; unit 20 minutes**

Pose the following questions to the review team(s):

* + Did we use the EQuIP criteria to frame and explain evaluation of evidence found in instructional materials?
	+ Did we develop a common understanding of EQuIP criteria among reviewers?
	+ Are there any criteria or evidence about which reviewers disagree?

**Collect Review Data**

**Time: 5 minutes**

Reviewers can submit review data by:

* Clicking the “submit” button on the Quality Review Rubric PDF;
* Emailing the Quality Review Rubric PDF to the session facilitator; or
* Handing in their paper copies of the Quality Review Rubric PDF.

Remind reviewers to complete the session feedback form.

1. Guiding questions are intended to support reviewers as needed. Reviewers should not feel obligated to answer all guiding questions. Rather, reviewers should focus on the review process. [↑](#footnote-ref-1)