North Carolina Principal Portfolio Assessment Recommendation

SL 2023-125

§ 115C-284.1. PART II. Development of Portfolio-Based Assessment

SECTION 2. The Professional Educator Preparation and Standards Commission (PEPSC), in consultation with the Department of Public Instruction and the North Carolina Principal Fellows Commission, shall develop a portfolio-based assessment system for use in applications for administrator licensure pursuant to G.S. 115C-284.1, Part II.

§ 115C-270.20(b)(1). PEPSC shall present recommendations to the State Board of Education for approval by **June 15, 2024**.

Historical Background: Principal Portfolio

- Principal Portfolio for EPPs requirement established (August 2007)
- Session Law 2023-125 requirement (September 2023)
- Statewide EPP Portfolio Review (December 2023)
    - Standardization of portfolio-based assessment requirement needed
    - Aligned with NC Standards for School Executives
    - Not consistent in format or requirements
- Creation of Task Force of Principal Standards, Licensure and Evaluation (January 2024)
- Research and selection of portfolio-based assessment system (March 2024)

Purpose and Work of the Principal Task Force

Gather broad stakeholder input on the best ways to meet obligations in SL 2023-125:

- Portfolio-based assessment system
- Internship

In addition, leveraging the Task Force to review:

- North Carolina Standards for School Executives (alignment with PSEL)
- Evaluation Rubric (NCEES)

Task Force Meetings

- January 30, 2024
- February 15, 2024
- February 28, 2024
- March 20, 2024
- April 17, 2024
- May 15, 2024 (next meeting)

Task Force on Principal Standards, Licensure, and Evaluation:

Brought together to gather broad stakeholder input to meet the needs of SL 2023-125 and review and assess the work-to-date on revising the NC Standards for School Executives

Educator Preparation Programs

- **Dr. John Boldt**, Director of Graduate Education Program & Assistant Professor of Education, Barton College
- **Dr. Brian Clarida**, Clinical Professor, Educational Leadership & Cultural Found, UNC-Greensboro
- **Dr. Tim Drake**, Associate Professor of Educational Leadership, North Carolina State University
- **Dr. Portia Gibbs-Roseboro**, Assistant Professor, Program Coordinator, School Administration & Curriculum & Instruction, NC Central University
- **Dr. Martinette Horner**, Program Director, School Administration, UNC-Chapel Hill
- **Dr. Karen Diane Jones**, MSA Program Director, East Carolina University
- **Dr. Dale Lamb**, Associate Professor, Masters of School Administration Program, Gardner Webb University
- **Dr. Lauren Lampron**, Director, NC Principal Fellows
- **Dr. Tony Stewart**, Assistant Director, NC Principal Fellows
- **Dr. Bryan Winters**, Department Chair, Educational Leadership Specialties, Program Director - MSA, UNC-Pembroke

Assistant Principals

- **Kristal Brooks**, Assistant Principal, Gates County ES, Gates County Schools
- **Darius Gillespie**, Assistant Principal, Montclair ES, Cumberland County Schools
- **Craig Higgins**, Assistant Principal, Ridge Road MS, Charlotte-Mecklenburg Schools

Principals

- **Dr. Donna Bledsoe**, 2023 NC Principal of the Year
- **Kisha Clemons**, 2020 NC Principal of the Year
- **Dr. Patrick Greene**, 2022 NC Principal of the Year

Superintendents

- **Dr. Valerie Bridges**, 2022 NC Superintendent of the Year
- **Dr. Marvin Connelly, Jr.**, Superintendent, Cumberland County Schools
- **Dr. Tricia McManus**, Superintendent, Winston-Salem Forsyth County Schools
- **Dr. Don Phipps**, Superintendent, Caldwell County Schools

Portfolio-based Assessment Recommendation Process

Portfolio-Based Assessment Considerations

I. PEDAGOGICAL	The assessment…
A. Alignment	Aligns with, and meaningfully assesses, NC's principal standards
B. EPP Flexibility	Does not force EPPs to conform to a specific program design
C. Scope	Meaningful coverage of standards. *Note: it is unlikely that any performance assessment can cover <u>all</u> of the standards and still be feasible and cost-effective. Both Pearson and ETS indicated that some standards are most appropriately assessed through coursework and/or internship requirements.*
D. Validity & Reliability	Is valid for use in the field; leads to reliable data that can be used for continuous improvement
E. User Experience	Is well designed; the size of the task is manageable and the directions are clear for candidates
II. PRACTICAL	**The assessment…**
A. Timeline	Will be ready for recommendation to PEPSC in time for PEPSC to recommend to SBE by 6/15
B. Cost to Candidates	The cost to candidates is commensurate with other required licensure exams
C. Budget	Budget neutral; does not require up front financial investment nor annual budget allocation to maintain
D. Ability to Customize	Can be adjusted to reflect NC's needs and context
E. Scoring Capacity	Does not require NC to have capacity for scoring, nor incur the cost of scoring (cf., edTPA)

Researching Options and Implementing a Plan

- Identified a total of 5 states are implementing a portfolio assessment (2 Pearson, 2 Educational Testing Service/ETS, 1 Bloomboard)

- The most viable choice was to leverage an existing state-specific assessment (CalAPA) and work with Pearson to contextualize to North Carolina needs

- Staff worked in collaboration with Pearson and the Taskforce to align for North Carolina

Developing the North Carolina Principal Portfolio Assessment

Tasks At-A-Glance

Portfolio Task 1: Using Data to Drive School Improvement	• Dig into data on one indicator for one subgroup • Analyze and develop a plan for strategic improvement • Get feedback on the plan • *Don't actually implement*
Portfolio Task 2: Facilitating Communities of Practice	• Work with leadership to identify a focus area • Convene a working group to refine a problem of practice, identify strategies to address it • *Videotape meetings and submit artifacts of the group* • *Go implement the strategies and gather data* • Analyze the data with the working group
Portfolio Task 3: Supporting Teacher Growth	• Observe and coach a teacher • *Videotape pre-obs meeting, observation and post-obs meeting*

North Carolina Standards for School Executives		CalAPA Pre-modification	NCPPA Post-modification
I: Strategic Leadership	Ia. School Vision, Mission, and Strategic Goals		
	Ib. Leading Change		
	Ic. School Improvement Planning		
	Id. Distributive Leadership		
II: Instructional Leadership	IIa. Focus on Learning and Teaching, Curriculum, Instruction, and Assessment		
	IIb. Focus on Instructional Time		
III: Cultural Leadership	IIIa. Focus on Collaborative Work Environment		
	IIIb. School Culture and Identity		
	IIIc. Acknowledges Failures; Celebrates Accomplishments and Rewards		
	IIId. Efficacy and Empowerment		
IV: Human Resource Leadership	IVa. Professional Development/Learning Communities		
	IVb. Recruiting, Hiring, Placing and Mentoring of Staff		
	IVc. Teacher and Staff Evaluation		

KEY

Meaningfully assesses this element	Partially assesses this element	Does not assess this element	Coursework/Internship

North Carolina Standards for School Executives		CalAPA Pre-modification	NCPPA Post-modification
V: Managerial Leadership	Va. School Resources and Budget		
	Vb. Conflict Management and Resolution		
	Vc. Systematic Communications		
	Vd. School Expectations for Students and Staff		
VI: External Development Leadership	VIa. Parent and Community Involvement and Outreach		
	VIb. Federal, State, and District Mandates		
VII: Micro-Political Leadership	VIIa. School Executive Micro-Political Leadership		

KEY

Meaningfully assesses this element	Partially assesses this element	Does not assess this element	Coursework/Internship

APP Recommendation for Licensure

III: Cultural Leadership	IIIb. School Culture and Identity		
	IIIc. Acknowledges Failures; Celebrates Accomplishments and Rewards		
	IIId. Efficacy and Empowerment		
IV: Human Resource Leadership	IVb. Recruiting, Hiring, Placing and Mentoring of Staff		

KEY	Meaningfully assesses this element	Partially assesses this element	Does not assess this element	Coursework/Internship

Contextualizing for North Carolina

Review the original

(Task + Guidance Docs + Rubrics)

Increase clarity

Align with NC language

Contextualize the task by increasing alignment with specific standards

ORIGINAL:

"How does the candidate demonstrate and analyze their leadership as they co-facilitate group meetings and support members, individually and as a group, in learning to implement the evidence-based strategy and use initial results and feedback from members to help inform the learning process?"

REVISED:

How does the candidate demonstrate and analyze their leadership of the group, in both group meetings and individual support, in learning to implement the evidence-based strategy? How does the candidate demonstrate and analyze their leadership of the group to support the efficacy of plan implementation? How does the candidate demonstrate and analyze their leadership of the group to use progress monitoring data to strengthen implementation? How does the candidate demonstrate and analyze the use of group feedback to inform the collaboration process?

Implementation with SBE Approval

- Cut Score
- Develop of Support Materials
- Training Sessions

Where We Go From Here

Task Force Next Steps

- Internship
- NC Standards for School Executives Review (alignment with Professional Standards for Educational Leadership)
- Evaluation Rubric (NCEES)

Questions

