

Program  
Providers

District and  
State Partners

# Quality Measures Principal Preparation Partnership Self-Assessment

Effective Training  
and Preparation

Highly Effective  
School Leaders

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This Toolkit is funded by The Wallace Foundation, whose mission is to foster equity and improvements in learning and enrichment for young people, and in the arts for everyone. Learn more about their work at [www.wallacefoundation.org](https://www.wallacefoundation.org).

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## Orientation to the QM Principal Preparation Partnership Self-Assessment

This tool is designed to help school districts and universities understand how to partner effectively in preparing aspiring principals. It builds on the Quality Measures Partnership Effectiveness Continuum (PEC), produced in 2014, which provided a broader picture of effective partnerships between districts and universities for multiple purposes. This version incorporates current research on district-provider partnerships for principal preparation, specifically.

The tool is organized into five key areas – or dimensions – that are most essential to effective partnerships: partnership vision; shared program leadership; partnership infrastructure; continuous improvement and progress tracking; and partnership sustainability, alignment, and integration. Indicators for each dimension describe district and university roles, responsibilities, and practices that contribute to an effective partnership. Each indicator is matched with examples of evidence that may demonstrate that partners have successfully implemented the indicator. These examples are not intended to be exhaustive, and partners engaging in the self-assessment are encouraged to identify additional examples of evidence that are relevant to the indicator in their practice.

Based on the collected evidence, partners collaboratively determine a rating for each indicator based on the rating scale below. These ratings are meant to guide continuous improvement and not to be evaluative. The indicators are aspirational – not a standard of competence – and meant as guideposts for the ongoing work of strengthening partnerships.

Rating Scale	
<b>1. Not Started</b>	Partnership has not yet been attended to in a meaningful way.
<b>2. Planning</b>	Partners have evidence of intended steps and/or collaborative thinking but little or no evidence that the indicator is currently practiced.
<b>3. Practicing</b>	Partners have evidence that the indicator is inconsistently practiced or partially in place.
<b>4. Established</b>	Partners have evidence that the indicator is consistently practiced or fully in place.
<b>5. Institutionalized</b>	Partners have evidence that the indicator is institutionalized.

## Using the Tool for Evidence-Based Self-Assessment

This self-assessment tool is designed to be used by principal preparation program and district partnership teams as a basis for interactive, collaborative reflection on their partnership's vision and goals, infrastructure, improvement processes, and sustainability. The Quality Measures Center at EDC offers users trained peer facilitators to moderate partnership self-study from a position of neutrality. Facilitators help self-study teams do the following:

- Understand the goals, objectives, and process for conducting a partnership self-study
- Make plans for efficiently and effectively assembling evidence
- Manage difficult conversations and differences of opinion
- Facilitate peer sharing in cohort conversations

For more information about enlisting the support of a trained QM facilitator to work with your self-study team, please contact the Quality Measures Center at [qmcenter@edc.org](mailto:qmcenter@edc.org) or visit the Quality Measures Center website: [qualitymeasures.org](http://qualitymeasures.org).

### Self-Facilitation

Partnerships may also opt to use the Principal Preparation Partnership Self-Assessment to engage in a process of self-study without the support of a trained QM facilitator. The complete self-assessment tool is a publicly available document that can be downloaded from the Quality Measures Center website, [qualitymeasures.org](http://qualitymeasures.org), for independent use by partnership teams.

If completing the self-assessment independently, we recommend partnership teams create a share folder where they can save artifacts for each dimension and indicator and create planned meeting time with partnership team members to discuss each dimension thoroughly. We recommend that partners collect their evidence in the shared folders individually, then meet monthly for five months to discuss one dimension per month. This gives the team time to think through the evidence, decide on a self-assessment rating, identify and celebrate strengths, and plan next steps based on opportunities for growth they identified as a team. While not necessary, partnerships are encouraged to complete this self-assessment with at least one other partnership team to maximize opportunities to share lessons learned and resources. An example of a cohort make-up could be one principal preparation program with multiple district partners or multiple principal preparation programs and their individual district partners.

Partnerships can use the supplemental rating sheet, found in [Appendix A](#), during the process of self-assessment and reflection and action planning sheet, found in [Appendix B](#), to document findings and next steps.

## The Research Behind Principal Preparation Program and District Partnerships

The following rubric of partnership dimensions and indicators articulates a detailed vision for high-quality district-principal preparation program partnership, based on research. The dimensions and indicators draw on the same research base as the Quality Measures [Partnership Effectiveness Continuum](#), created in 2014, while incorporating current research. Examples of relevant evidence come from both scholarly research and the practical experience of partnerships that have used this tool.

### Why Focus on District-Principal Preparation Program Partnerships?

A small but growing body of research suggests that strong partnerships between districts and principal preparation programs are essential to high quality preparation programs by supporting a more comprehensive and authentic training experience for candidates, with co-designed clinical experiences and strong buy-in from all parties (Gray, Walker, Zimmerman, & Dickson, 2022; Kaufman, Gates, Harvey, Wang, & Barrett, 2017; Leggett, DeSander, & Evans, 2022; Sutchter, Podolsky, & Espinoza, 2017; The Wallace Foundation, 2016). Strong partnerships are also critical to creating and maintaining principal pipelines and stronger supports for new principals via coordinated professional development (Gates, Kaufman, Doan, Prado Tuma, & Kim, 2020; Sutchter, Podolsky, & Espinoza, 2017; Williams, Romans, Perrone, Borden, & Woodrum, 2022).

Partnerships involve explicit and implicit communication, processes, policies, and beliefs. Based on research, this tool breaks down the critical components that make up an effective partnership into five dimensions, each with concrete indicators and examples of evidence. These five components include

- an explicit, documented, and shared vision for the partnership
- collaborative processes for designing and leading the partnership activities
- regular communication and a shared understanding of decision-making protocols
- processes for ongoing collection and discussion of data to make decisions
- a plan for sustainability, including personnel transitions and organizational leader buy-in

## Partnership Dimensions at a Glance

### 1: Partnership Vision

- 1a. Shared vision of principal
- 1b. Shared vision of leader prep program
- 1c. Shared purpose & value in collaboration
- 1d. Setting goals and measuring progress

### 2: Shared Program Leadership

- 2a. Collaboration on recruitment
- 2b. Collaboration on selection
- 2c. Collaboration on coursework
- 2d. Collaboration on clinical experience
- 2e. Regular communication

### 3: Partnership Infrastructure

- 3a. Shared decision-making
- 3b. Regular communication structures
- 3c. Partner roles and responsibilities
- 3d. Collaboration structures
- 3e. Programming resources

### 4: Continuous Improvement and Progress Tracking

- 4a. Data sharing infrastructure
- 4b. Collaborative data analysis
- 4c. Data-driven continuous improvement

### 5: Partnership Sustainability, Alignment, and Integration

- 5a. Transition plan among partners
- 5b. Funding to sustain partnership
- 5c. Institutional leaders' support
- 5d. Updating shared partnership vision
- 5e. Collaboration on professional development

## QM Rubrics

Dimension 1: Partnership Vision	
INDICATORS	EXAMPLES OF EVIDENCE
<p><b>1a.</b> Partners have an explicit, shared vision of what an effective principal knows and is able to do, which reflects local community needs and characteristics.</p>	<ul style="list-style-type: none"> <li>• Principal leadership standards</li> <li>• Portrait of a Leader / Profile of a Program Graduate</li> <li>• A shared mission or goal statement</li> <li>• Summary document showing alignment between program standards and district leadership competencies</li> </ul>
<p><b>1b.</b> Partners have an explicit, shared vision of the components of an effective principal preparation program.</p>	<ul style="list-style-type: none"> <li>• Principal preparation program standards</li> <li>• Collaboratively created program design</li> <li>• Summary document aligning program standards and district leadership competencies</li> </ul>
<p><b>1c.</b> Partners have an explicit, shared understanding of the purpose and value of their collaboration.</p>	<ul style="list-style-type: none"> <li>• Partnership mission statement</li> <li>• Partnership team charter</li> <li>• Partnership agreement / Memorandum of Understanding (MOU)</li> </ul>
<p><b>1d.</b> Partners articulate clear, measurable short, medium, and long-term goals and establish metrics for measuring progress.</p>	<ul style="list-style-type: none"> <li>• Progress report</li> <li>• Annual report</li> <li>• Grant application</li> </ul>



Dimension 2: Shared Program Leadership	
INDICATORS	EXAMPLES OF EVIDENCE
<b>2a.</b> Partners co-develop recruitment priorities and plans and jointly participate in recruitment.	<ul style="list-style-type: none"> <li>• Recruitment priorities</li> <li>• Recruitment plan</li> <li>• Materials from recruitment events</li> <li>• Evidence of partner participation at recruitment events</li> </ul>
<b>2b.</b> Partners collaboratively develop program selection criteria and jointly participate in candidate selection.	<ul style="list-style-type: none"> <li>• Selection criteria/rubric</li> <li>• Agenda or meeting notes from candidate selection process</li> </ul>
<b>2c.</b> Partners collaborate on the design and delivery of coursework.	<ul style="list-style-type: none"> <li>• Course sequence and syllabi</li> <li>• Course assignments</li> <li>• Agendas or minutes from course design meetings</li> <li>• District-based adjunct faculty</li> </ul>
<b>2d.</b> Partners co-design the clinical experience and collaborate on the support of principal candidates.	<ul style="list-style-type: none"> <li>• Descriptions of activities in the clinical experience</li> <li>• Work samples from the clinical experience</li> <li>• Communications or meeting minutes between university and district-based principal candidate supervisors (sometimes called clinical coordinator, mentor, coach, facilitator) to coordinate support</li> </ul>
<b>2e.</b> Partners regularly communicate about candidate progress and support.	<ul style="list-style-type: none"> <li>• “Triad” meeting agendas (candidate, faculty member, clinical supervisor, or coach)</li> <li>• Protocols for joint review of candidate progress</li> <li>• Candidate feedback protocols</li> </ul>

Dimension 3: Partnership Infrastructure	
INDICATORS	EXAMPLES OF EVIDENCE
<b>3a.</b> Partners have clear processes for shared decision making that include ample input from each partner organization.	<ul style="list-style-type: none"> <li>• Memorandum of Understanding (MOU)</li> <li>• Decision-making protocol</li> <li>• Guidelines for how faculty and district staff contribute to decisions about candidate selection, placement, course design, etc.</li> </ul>
<b>3b.</b> Partners regularly communicate through defined structures and routines.	<ul style="list-style-type: none"> <li>• Meeting schedules and meeting minutes</li> <li>• Project plans or timelines</li> <li>• Informal communication channels (e.g., Slack, email, shared folders)</li> <li>• Protocols for communication</li> </ul>
<b>3c.</b> Partners have clearly defined roles and responsibilities.	<ul style="list-style-type: none"> <li>• MOU</li> <li>• Annual work plan</li> <li>• Grant application</li> </ul>
<b>3d.</b> Partners have systems, structures, and routines to support collaboration.	<ul style="list-style-type: none"> <li>• Regular meeting times and meeting minutes/notes</li> <li>• Shared folder system (e.g., Google drive)</li> <li>• Protocols for reviewing program artifacts or candidate work samples</li> <li>• Participation on advisory committee or board</li> </ul>
<b>3e.</b> Partners have sufficient resources (financial, time, and staffing) to lead and manage the program.	<ul style="list-style-type: none"> <li>• Budget statements</li> <li>• Staff rosters</li> <li>• Work plan with staff assignments</li> </ul>

Dimension 4: Continuous Improvement and Progress Tracking	
INDICATORS	EXAMPLES OF EVIDENCE
<p><b>4a.</b> Partners have created the infrastructure for collecting and sharing data relevant to the partnership.</p>	<ul style="list-style-type: none"> <li>• Data sharing agreement</li> <li>• Schedule for data collection and analysis</li> <li>• A shared data management system</li> <li>• Protocols for sharing candidate work</li> <li>• Leadership tracking system</li> </ul>
<p><b>4b.</b> Partners regularly engage in collaborative data analysis related to district needs, program quality, candidate progress, and the success of graduates in the field.</p>	<ul style="list-style-type: none"> <li>• Meeting agendas/minutes that include data analysis time</li> <li>• Protocols for collaborative data analysis</li> <li>• Datasets and/or findings</li> </ul>
<p><b>4c.</b> Partners apply findings from data for continuous improvement.</p>	<ul style="list-style-type: none"> <li>• Action plans based on data analyses</li> </ul>

Dimension 5: Partnership Sustainability, Alignment, and Integration	
INDICATORS	EXAMPLES OF EVIDENCE
<p><b>5a.</b> Partners have an articulated transition plan for role turnover, including orientation to each partner's organizational processes and relevant history.</p>	<ul style="list-style-type: none"> <li>• Procedures or protocols for onboarding new staff</li> <li>• Documentation of partnership information (e.g., contact lists, meeting schedules, past meeting notes)</li> <li>• Job descriptions, including lists of responsibilities for role</li> </ul>
<p><b>5b.</b> Partners have adequate funding to sustain the partnership's needs.</p>	<ul style="list-style-type: none"> <li>• Budget documents that reflect funding and/or in-kind support</li> <li>• MOU</li> </ul>
<p><b>5c.</b> Partners engage institutional leaders to support partnership goals and sustainability.</p>	<ul style="list-style-type: none"> <li>• Meeting minutes</li> <li>• Communication from institutional leaders</li> <li>• Institutional publications that indicate support for the partnership</li> </ul>
<p><b>5d.</b> Partners update and maintain a shared partnership vision to reflect current local community needs.</p>	<ul style="list-style-type: none"> <li>• Partnership vision statement</li> <li>• MOU</li> </ul>
<p><b>5e.</b> Partners collaborate on professional development opportunities for school leaders, including new leader induction.</p>	<ul style="list-style-type: none"> <li>• New leader induction program description</li> <li>• Training materials, including workshops, for principal mentors for new instructional leaders.</li> </ul>

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## Appendix A

### Partnership Self-Assessment Rating Sheet

**Rating Scale:** 1= Not Started    2= Planning    3= Practicing    4= Established    5=Institutionalized

Dimension 1: Partnership Vision				
Indicator	Rating	What evidence did you use to rate this indicator?	Why did you select this rating?	What are some possible next steps for strengthening this dimension?
1a. Partners have an explicit, shared vision of what an effective principal knows and is able to do, which reflects local community needs and characteristics.				
1b. Partners have an explicit, shared vision of the components of an effective principal preparation program.				
1c. Partners have an explicit, shared understanding of the purpose and value of their collaboration.				
1d. Partners articulate clear, measurable short, medium, and long-term goals and establish metrics for measuring progress.				

Rating Scale: 1= Not Started 2= Planning 3= Practicing 4= Established 5=Institutionalized

Dimension 2: Shared Program Leadership				
Indicator	Rating	What evidence did you use to rate this indicator?	Why did you select this rating?	What are some possible next steps for strengthening this dimension?
2a. Partners co-develop recruitment priorities and plans and jointly participate in recruitment.				
2b. Partners collaboratively develop program selection criteria and jointly participate in candidate selection.				
2c. Partners collaborate on the design and delivery of coursework.				
2d. Partners co-design the clinical experience and collaborate on the support of principal candidates.				
2e. Partners regularly communicate about candidate progress and support.				

Rating Scale: 1= Not Started 2= Planning 3= Practicing 4= Established 5=Institutionalized

Dimension 3: Partnership Infrastructure				
Indicator	Rating	What evidence did you use to rate this indicator?	Why did you select this rating?	What are some possible next steps for strengthening this dimension?
3a. Partners have clear processes for shared decision making that include ample input from each partner organization.				
3b. Partners regularly communicate through defined structures and routines.				
3c. Partners have clearly defined roles and responsibilities.				
3d. Partners have systems, structures, and routines to support collaboration.				
3e. Partners have sufficient resources (financial, time, and staffing) to lead and manage the program.				

Rating Scale: 1= Not Started 2= Planning 3= Practicing 4= Established 5=Institutionalized

Dimension 4: Continuous Improvement and Progress Tracking				
Indicator	Rating	What evidence did you use to rate this indicator?	Why did you select this rating?	What are some possible next steps for strengthening this dimension?
4a. Partners have created the infrastructure for collecting and sharing data relevant to the partnership.				
4b. Partners regularly engage in collaborative data analysis related to district needs, program quality, candidate progress, and the success of graduates in the field.				
4c. Partners apply findings from data for continuous improvement.				

Rating Scale: 1= Not Started 2= Planning 3= Practicing 4= Established 5=Institutionalized

Dimension 5: Partnership Sustainability, Alignment, and Integration				
Indicator	Rating	What evidence did you use to rate this indicator?	Why did you select this rating?	What are some possible next steps for strengthening this dimension?
5a. Partners have an articulated transition plan for role turnover, including orientation to each partner’s organizational processes and relevant history.				
5b. Partners have adequate funding to sustain the partnership’s needs.				
5c. Partners engage institutional leaders to support partnership goals and sustainability.				
5d. Partners update and maintain a shared partnership vision to reflect current local community needs.				
5e. Partners collaborate on professional development opportunities for school leaders, including new leader induction.				

## Appendix B

## Partnership Self-study Reflection and Action Planning

<b>Understanding Strengths and Challenges</b>	
What dimension(s) are the greatest strengths for your partnership?	
What dimension(s) do you most want to improve?	
What barriers and challenges are you facing in your areas for improvement?	
How might you address these barriers and challenges? What are potential solutions?	

Prioritizing Areas of Focus	
Which of the strategies/solutions brainstormed have the potential to be most impactful?	
What level of effort will it take to implement each strategy/solution?	
What resources are required to implement these ideas?	
Considering capacity constraints, which ideas do you want to implement now? Which will you save for the future?	

Action Planning				
<i>Goal</i>	<i>Action Steps</i>	<i>Person Responsible</i>	<i>Timeline</i>	<i>Indicators of Success</i>



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