EQuIP Rubric

Educators Evaluating Quality Instructional Products (EQuIP) is a collaborative of states working with Achieve to increase the supply of quality instructional materials that are aligned to the CCSS and build the capacity of educators to evaluate and improve the quality of instructional materials for use in their classrooms and schools. The EQuIP Rubrics are a set of quality review tools to evaluate the alignment of lessons, units and modules to the CCSS. There are three EQuIP Rubrics, one each for Mathematics, K–2 English Language Arts/Literacy, and a combined rubric for 3–5 English Language Arts/Literacy and 6–12 English Language Arts. EQuIP builds on a collaborative effort of education leaders from Massachusetts, New York and Rhode Island that Achieve facilitated.

The EQuIP Rubrics should be used for:
- Guiding the development of lessons and units;
- Evaluating existing lessons and units to identify improvements needed to align with the CCSS;
- Building the capacity of teachers to gain a deeper understanding of the instructional demands of the CCSS; and,
- Informing publishers of the criteria that will be applied in the evaluation of proposals and final products.

a) *Where to find online:*
To view and download the rubrics and related training materials, please visit: www.achieve.org/equip

b) *Who uses:*
The EQuIP Rubrics are designed for use by educators and administrators responsible for developing, reviewing or making determinations about materials for use in classrooms. This includes classroom teachers, instructional coaches, instructional leaders and administrators at the school, district or state level.

c) *Target materials:*
The EQuIP Rubrics are designed to evaluate lessons that include instructional activities and assessments aligned to the CCSS that may extend over a few class periods or days as well as units that include integrated and focused lessons aligned to the CCSS that extend over a period of several weeks. The rubrics are not designed to evaluate a single task or activity or portion of a lesson. The rubrics intentionally do not require a specific template for lesson or unit design.

d) *How to use:*
The EQuIP Rubrics can guide the development of lessons and units as well as examine and evaluate existing lessons and units to identify improvements necessary to align with the CCSS. They can be used by individuals or groups, integrated into formal review panels/processes and professional learning communities, and/or used more informally to guide discussions and decision making.

The criteria in the EQuIP Rubrics are separated into four dimensions: Alignment to the Depth of the CCSS, Key Shifts in the CCSS, Instructional Supports, and Assessment.

Getting Started

It is helpful to first orient yourself to all of the materials necessary to complete an EQuIP Quality Review. These materials will include the lesson or unit being evaluated, including any texts or rubrics utilized by teachers or students, a copy of the Common Core State Standards, and an EQuIP Rubric Feedback form. As this is a collegial process, reviewers working together should introduce themselves to one another.

Principles & Agreements

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. It is vital to the process to create a collegial environment, recognizing both that it is challenging to create high-quality instructional materials and that it is necessary to receive quality feedback in order to improve these materials.

1. **CCSS:** Before beginning a review, all members are confident in their knowledge of the CCSS.
2. **Inquiry:** Review processes emphasize inquiry and are organized in steps around a set of guiding questions.
3. **Respect & Commitment:** Each member of a review team is respected as a valued colleague and contributor who makes a commitment to the EQuIP process.
4. **Criteria & Evidence:** All observations, judgments, discussions, and recommendations are criterion- and evidence-based.
5. **Constructive:** Lessons/units to be reviewed are seen as "works in progress." Reviewers are respectful of contributors' work and make constructive observations and suggestions based on evidence from the work.
6. **Individual to Collective:** Each member of a review team independently records his/her observations prior to discussion. Discussions focus on understanding all reviewers' interpretations of the criteria and the evidence they have found.
7. **Understanding & Agreement:** The goal of the process is to compare and eventually calibrate judgments to move toward agreement about quality with respect to the CCSS.

Giving Feedback

The goal of EQuIP is to support the education community in the development of exemplary curriculum; constructive feedback and comments are fundamental to improving the materials. Reviewers should consider their audience and purposes when crafting the tone and content of their comments. It is critical to read every page of a lesson or unit. Writing effective feedback is vital to the EQuIP Quality Review Process. Below are the four qualities of effective feedback.

- **Criteria-based:** Written comments are based on the criteria used for review in each dimension. No extraneous or personal comments are included.
- **Evidence Cited:** Written comments suggest that the reviewer looked for evidence in the lesson or unit that address each criterion of a given dimension. Examples are provided that cite where and how the criteria are met or not met.
- **Improvement Suggested:** When improvements are identified to meet criteria or strengthen the lesson or unit, specific information is provided about how and where such improvement should be added to the material.
- **Clear Communication:** Written comments are constructed in a manner keeping with basic grammar, spelling, sentence structure and conventions.

EQuIP Quality Review Steps

Step 1. Review Materials

- Record the grade and title of the lesson/unit on the Quality Review Rubric PDF.
- Scan to see what the lesson/unit contains and how it is organized.
- Read key materials related to instruction, assessment and teacher guidance.
- In ELA, study and measure the text(s) that serves as the centerpiece for the lesson/unit, analyzing text complexity, quality, scope, and relationship to instruction.
- In math, study and work the task that serves as the centerpiece for the lesson/unit, analyzing the content and mathematics practices the tasks require.

Guidance for facilitators: 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 read the text(s) and look for the quantitative and qualitative measures of text(s) complexity or study and work the tasks that are central to instruction.

Explain that reviewers should not use the EQuIP Rubric during Step 1. Reviewers will have ample opportunity to think deeply about the criteria in each dimension during subsequent steps of the review process.

If the materials are not clearly labeled, it is necessary to determine if the materials should be reviewed as a lesson or unit. EQuIP generally defines a lesson as one to ten days of instruction and a unit as two to ten weeks of instruction; however, reviewers should use their professional judgment when making this determination. Please consider if it would be appropriate to apply the additional criteria given the purpose of instruction and the standard(s) the materials target.

Step 2. Apply Criteria in Dimension I: Alignment to the Depth of the CCSS

- Identify the grade-level CCSS that the lesson/unit targets.
- Closely examine the materials through the "lens" of each criterion.
- Indicate each criterion for which clear and substantial evidence is found.
- Record evidence and specific improvements needed to meet criteria or strengthen alignment.
- Compare observations and suggestions for improvement.

Guidance for facilitators: The criteria may only be checked 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 there are still constructive suggestions that can be made. In such cases, reviewers may provide feedback related to criteria that have been checked.

Step 3. Apply Criteria in Dimensions II–IV

- Examine the lesson/unit through the "lens" of each criterion.
- Indicate each criterion met and record observations and feedback.

Step 4. Apply an Overall Rating and Provide Summary Comments

- Individually review comments for Dimensions I–IV, adding/clarifying comments as needed.
- Individually write summary comments on the Quality Review Rubric PDF.

Guidance for facilitators: If reviewers are going to stop a review at Dimension I, take time to make sure the criteria are absent.

There may be instances when reviewers find clear and substantial evidence of a criterion and there are still constructive suggestions that can be made. In such cases, reviewers should provide feedback related to criteria that have been checked.

It's acceptable to give a "3" rating without having all of the criteria checked within a dimension. It's about supporting with evidence regardless of the rating a reviewer gives. If recommendations for improvement are too significant, then the rating should be less than a "3." There should be a relationship between the number of checks and the overall rating. There shouldn't be huge misalignment, but it comes down to professional judgment. Reviewers should stand back and look at the review in its totality.

Step 5. Compare Overall Ratings and Determine Next Steps

- Note the evidence cited to arrive at summary comments and similarities and differences among reviewers. Recommend next steps for the lesson/unit and provide recommendations for improvement to developers/teachers.

Grade: **Literacy Lesson/Unit Title:** **Overall Rating:**

I. Alignment to the Depth of the CCSS	II. Key Shifts in the CCSS	III. Instructional Supports	IV. Assessment
The lesson/unit aligns with the letter and spirit of the CCSS: o Targets a set of K-2 ELA/Literacy CCSS for teaching and learning. o Includes a clear and explicit purpose for instruction. o Selects quality text(s) that align with the requirements outlined in the standards, presents characteristics similar to CCSS K-2 exemplars (Appendix B), and are of sufficient scope for the stated purpose. o Provides opportunities for students to present ideas and information through writing and/or drawing and speaking experiences. *A unit or longer lesson should:* o Emphasize the explicit, systematic development of foundational literacy skills (concepts of print, phonological awareness, the alphabetic principle, high frequency sight words, and phonics). o Regularly include specific fluency-building techniques supported by research (e.g., monitored partner reading, choral reading, repeated readings with text, following along in the text when teacher or other fluent reader is reading aloud, short timed practice that is slightly challenging to the reader). o Integrate reading, writing, speaking and listening so that students apply and synthesize advancing literacy skills. o Build students' content knowledge in social studies, the arts, science or technical subjects through a coherent sequence of texts and series of questions that build knowledge within a topic.	*The lesson/unit addresses key shifts in the CCSS:* o **Reading Text Closely:** Makes reading text(s) closely (including read alouds) a central focus of instruction and includes regular opportunities for students to ask and answer text-dependent questions. o **Text-Based Evidence:** Facilitates rich text-based discussions and writing through specific, thought-provoking questions about common texts (including read alouds and, when applicable, illustrations, audio/video and other media). o **Academic Vocabulary:** Focuses on explicitly building students' academic vocabulary and concepts of syntax throughout instruction. *A unit or longer lesson should:* o **Grade-Level Reading:** Include a progression of texts as students learn to read (e.g., additional phonic patterns are introduced, increasing sentence length). Provides text-centered learning that is sequenced, scaffolded and supported to advance students toward independent grade-level reading. o **Balance of Texts:** Focus instruction equally on literary and informational texts as stipulated in the CCSS (p.5) and indicated by instructional time (*may be more applicable across a year or several units*). o **Balance of Writing:** Include prominent and varied writing opportunities for students that balance communicating thinking and answering questions with self-expression and exploration.	*The lesson/unit is responsive to varied student learning needs:* o Cultivates student interest and engagement in reading, writing and speaking about texts. o Addresses instructional expectations and is easy to understand and use for teachers (e.g., clear directions, sample proficient student responses, sections that build teacher understanding of the whys and how of the material). o Integrates targeted instruction in multiple areas such as grammar and syntax, writing strategies, discussion rules and aspects of foundational reading. o Provides substantial materials to support students who need more time and attention to achieve automaticity with decoding, phonemic awareness, fluency and/or vocabulary acquisition. o Provides *all* students (including emergent and beginning readers) with extensive opportunities to engage with grade-level texts and read alouds that are at high levels of complexity including appropriate scaffolding so that students directly experience the complexity of text. o Focuses on sections of rich text(s) (including read alouds) that present the greatest challenge; provides discussion questions and other supports to promote student engagement, understanding and progress toward independence. o Integrates appropriate, extensive and easily implemented supports for students who are ELL, have disabilities and/or read or write below grade level. o Provides extensions and/or more advanced text for students who read or write above grade level. *A unit or longer lesson should:* o Include a progression of learning where concepts, knowledge and skills advance and deepen over time (*may be more applicable across the year or several units*). o Gradually remove supports, allowing students to demonstrate their independent capacities (*may be more applicable across the year or several units*). o Provide for authentic learning, application of literacy skills and/or student-directed inquiry. o Indicate how students are accountable for independent engaged reading based on student choice and interest to build stamina, confidence and motivation (*may be more applicable across the year or several units*). o Use technology and media to deepen learning and draw attention to evidence and texts as appropriate.	*The lesson/unit regularly assesses whether students are developing standards-based skills:* o Elicits direct, observable evidence of the degree to which a student can independently demonstrate foundational skills and targeted grade level literacy CCSS (e.g., reading, writing, speaking and listening and/or language). o Assesses student proficiency using methods that are unbiased and accessible to all students. o Includes aligned rubrics or assessment guidelines that provide sufficient guidance for interpreting student performance and responding to areas where students are not yet meeting standards. *A unit or longer lesson should:* o Use varied modes of assessment, including a range of pre-, formative, summative and self-assessment measures.
Rating: 3 2 1 0	**Rating: 3 2 1 0**	**Rating: 3 2 1 0**	**Rating: 3 2 1 0**

The EQuIP rubric is derived from the Tri-State Rubric and the collaborative development process led by Massachusetts, New York, and Rhode Island and facilitated by Achieve.
This version of the EQuIP rubric is current as of 06-24-13.

204

EQuIP Rubric for Lessons & Units: ELA/Literacy Grades K-2

Directions: The Quality Review Rubric provides criteria to determine the quality and alignment of lessons and units to the Common Core State Standards (CCSS) in order to: (1) Identify exemplars/ models for teachers' use within and across states; (2) provide constructive criteria-based feedback to developers; and (3) review existing instructional materials to determine what revisions are needed.

Step 1 – Review Materials
- Record the grade and title of the lesson/unit on the recording form.
- Scan to see what the lesson/unit contains and how it is organized.
- Read key materials related to instruction, assessment and teacher guidance.
- Study and measure the text(s) that serves as the centerpiece for the lesson/unit, analyzing text complexity, quality, scope, and relationship to instruction.

Step 2 – Apply Criteria in Dimension I: Alignment
- Identify the grade-level CCSS that the lesson/unit targets.
- Closely examine the materials through the "lens" of each criterion.
- Individually check each criterion for which clear and substantial evidence is found.
- Identify and record input on specific improvements that might be made to meet criteria or strengthen alignment.
- Enter your rating 0 – 3 for Dimension I: Alignment

Note: Dimension I is non-negotiable. In order for the review to continue, a rating of 2 or 3 is required. If the review is discontinued, consider general feedback that might be given to developers/teachers regarding next steps.

Step 3 – Apply Criteria in Dimensions II – IV
- Closely examine the lesson/unit through the "lens" of each criterion.
- Record comments on criteria met, improvements needed and then rate 0 – 3.

When working in a group, individuals may choose to compare ratings after each dimension or delay conversation until each person has rated and recorded their input for the remaining Dimensions II – IV.

Step 4 – Apply an Overall Rating and Provide Summary Comments
- Review ratings for Dimensions I – IV adding/clarifying comments as needed.
- Write summary comments for your overall rating on your recording sheet.
- Total dimension ratings and record overall rating E, E/I, R, N – adjust as necessary.

If working in a group, individuals should record their overall rating prior to conversation.

Step 5 – Compare Overall Ratings and Determine Next Steps
- Note the evidence cited to arrive at final ratings, summary comments and similarities and differences among raters. Recommend next steps for the lesson/unit and provide recommendations for improvement and/or ratings to developers/teachers.

Additional Guidance for ELA/Literacy – When selecting text(s) that measure within the grade-level or text complexity band and are of sufficient quality and scope for the stated purpose, see *The Common Core State Standards in English Language Arts/Literacy* at www.corestandards.org/ELA-Literacy; and the *Supplement for Appendix A: New Research on Text Complexity as well as Quantitative and Qualitative Measures* at www.achievethecore.org/steal-these-tools/text-complexity. See *The Publishers' Criteria* for Grades K-2 and the same for Grades 3-12 at www.achievethecore.org/steal-these-tools.

Rating Scales
Note: Rating for Dimension I: Alignment is non-negotiable and requires a rating of 2 or 3. If rating is 0 or 1 then the review does not continue.

Rating Scale for Dimensions I, II, III, IV:	Overall Rating for the Lesson/Unit:
3: Meets most to all of the criteria in the dimension	**E: Exemplar –** Aligned and meets most to all of the criteria in dimensions II, III, IV **(total 11 – 12)**
2: Meets many of the criteria in the dimension	**E/I: Exemplar *if* Improved –** Aligned and needs some improvement in one or more dimensions **(total 8 – 10)**
1: Meets some of the criteria in the dimension	**R: Revision Needed –** Aligned partially and needs significant revision in one or more dimensions **(total 3 – 7)**
0: Does not meet the criteria in the dimension	**N: Not Ready to Review –** Not aligned and does not meet criteria **(total 0 – 2)**
Descriptors for Dimensions I, II, III, IV:	**Descriptors for Overall Rating:**
3: Exemplifies CCSS Quality – meets the standard described by criteria in the dimension, as explained in criterion-based observations.	**E: Exemplifies CCSS Quality –** Aligned and exemplifies the quality standard and exemplifies most of the criteria across Dimensions II, III, IV of the rubric.
2: Approaching CCSS Quality – meets many criteria but will benefit from revision in others, as suggested in criterion-based observations.	**E/I: Approaching CCSS Quality –** Aligned and exemplifies the quality standard in some dimensions but will benefit from some revision in others.
1: Developing toward CCSS Quality – needs significant revision, as suggested in criterion-based observations.	**R: Developing toward CCSS Quality –** Aligned partially and approaches the quality standard in some dimensions and needs significant revision in others.
0: Not representing CCSS Quality – does not address the criteria in the dimension.	**N: Not representing CCSS Quality –** Not aligned and does not address criteria.