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: **Mathematics 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: ○ Targets a set of grade-level CCSS mathematics standard(s) to the full depth of the standards for teaching and learning. ○ Standards for Mathematical Practice that are central to the lesson are identified, handled in a grade-appropriate way, and well connected to the content being addressed. ○ Presents a balance of mathematical procedures and deeper conceptual understanding inherent in the CCSS.	*The lesson/unit reflects evidence of key shifts that are reflected in the CCSS:* ○ **Focus:** Lessons and units targeting the major work of the grade provide an especially in-depth treatment, with especially high expectations. Lessons and units targeting supporting work of the grade have visible connection to the major work of the grade and are sufficiently brief. Lessons and units do not hold students responsible for material from later grades. ○ **Coherence:** The content develops through reasoning about the new concepts on the basis of previous understandings. Where appropriate, provides opportunities for students to connect knowledge and skills within or across clusters, domains and learning progressions. ○ **Rigor:** Requires students to engage with and demonstrate challenging mathematics with appropriate balance among the following: – **Application:** Provides opportunities for students to independently apply mathematical concepts in real-world situations and solve challenging problems with persistence, choosing and applying an appropriate model or strategy to new situations. – **Conceptual Understanding:** Develops students' conceptual understanding through tasks, brief problems, questions, multiple representations and opportunities for students to write and speak about their understanding. – **Procedural Skill and Fluency:** Expects, supports and provides guidelines for procedural skill and fluency with core calculations and mathematical procedures (when called for in the standards for the grade) to be performed quickly and accurately.	*The lesson/unit is responsive to varied student learning needs:* ○ Includes clear and sufficient guidance to support teaching and learning of the targeted standards, including, when appropriate, the use of technology and media. ○ Uses and encourages precise and accurate mathematics, academic language, terminology and concrete or abstract representations (e.g., pictures, symbols, expressions, equations, graphics, models) in the discipline. ○ Engages students in productive struggle through relevant, thought-provoking questions, problems and tasks that stimulate interest and elicit mathematical thinking. ○ Addresses instructional expectations and is easy to understand and use. ○ Provides appropriate level and type of scaffolding, differentiation, intervention and support for a broad range of learners. – Supports diverse cultural and linguistic backgrounds, interests and styles. – Provides extra supports for students working below grade level. – Provides extensions for students with high interest or working above grade level. *A unit or longer lesson should:* ○ Recommend and facilitate a mix of instructional approaches for a variety of learners such as using multiple representations (e.g., including models, using a range of questions, checking for understanding, flexible grouping, pair-share). ○ Gradually remove supports, requiring students to demonstrate their mathematical understanding independently. ○ Demonstrate an effective sequence and a progression of learning where the concepts or skills advance and deepen over time. ○ Expect, support and provide guidelines for procedural skill and fluency with core calculations and mathematical procedures (when called for in the standards for the grade) to be performed quickly and accurately.	*The lesson/unit regularly assesses whether students are mastering standards-based content and skills:* ○ Is designed to elicit direct, observable evidence of the degree to which a student can independently demonstrate the targeted CCSS. ○ Assesses student proficiency using methods that are accessible and unbiased, including the use of grade-level language in student prompts. ○ Includes aligned rubrics, answer keys and scoring guidelines that provide sufficient guidance for interpreting student performance. *A unit or longer lesson should:* ○ Use varied modes of curriculum-embedded assessments that may include 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**

EQuIP Rubric for Lessons & Units: Mathematics

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 work the task that serves as the centerpiece for the lesson/unit, analyzing the content and mathematical practices the tasks require.

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 on Dimension II: Shifts - When considering *Focus* it is important that lessons or units targeting additional and supporting clusters are sufficiently brief – this ensures that students will spend the strong majority of the year on major work of the grade. See the *K-8 Publishers Criteria for the Common Core State Standards in Mathematics*, particularly pages 8-9 for further information on the focus criterion with respect to major work of the grade at www.corestandards.org/assets/Math_Publishers_Criteria_K-8_Summer%202012_FINAL.pdf. With respect to *Coherence* it is important that the learning objectives are linked to CCSS cluster headings (see www.corestandards.org/Math).

Rating Scales

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:

3: Meets most to all of the criteria in the dimension
2: Meets many of the criteria in the dimension
1: Meets some of the criteria in the dimension
0: Does not meet the criteria in the dimension

Descriptors for Dimensions I, II, III, IV:

3: **Exemplifies CCSS Quality -** meets the standard described by criteria in the dimension, as explained in criterion-based observations.
2: **Approaching CCSS Quality -** meets many criteria but will benefit from revision in others, as suggested in criterion-based observations.
1: **Developing toward CCSS Quality -** needs significant revision, as suggested in criterion-based observations.
0: **Not representing CCSS Quality** - does not address the criteria in the dimension.

Overall Rating for the Lesson/Unit:

E: Exemplar – Aligned and meets most to all of the criteria in dimensions II, III, IV **(total 11 – 12)**
E/I: Exemplar *if* Improved – Aligned and needs some improvement in one or more dimensions **(total 8 – 10)**
R: Revision Needed – Aligned partially and needs significant revision in one or more dimensions **(total 3 – 7)**
N: Not Ready to Review – Not aligned and does not meet criteria **(total 0 – 2)**

Descriptor for Overall Ratings:

E: Exemplifies CCSS Quality – Aligned and exemplifies the quality standard and exemplifies most of the criteria across Dimensions II, III, IV of the rubric.
E/I: Approaching CCSS Quality – Aligned and exemplifies the quality standard in some dimensions but will benefit from some revision in others.
R: Developing toward CCSS Quality – Aligned partially and approaches the quality standard in some dimensions and needs significant revision in others.
N: Not representing CCSS Quality – Not aligned and does not address criteria.