ONLINE TAIS MODULES

Facilitator Guide

TAIS 201
Module 2.1a

Content Focus:
Data Analysis: Plan Evaluation
### Module Summary

#### The “Big Ideas”
Before a campus embarks on creating an improvement plan, it is important to reflect on the previous year’s successes and struggles with improvement planning and implementation. This module encourages deliberate and purposeful thinking to refine a campus’ improvement planning practice.

#### Participants’ Learning Outcomes
By the end of this training module, participants should be able to:

- Diagnose the reasons for the previous year’s improvement plan’s successes and/or struggles
- Reflect on lessons learned in order to create a more successful improvement plan for the next school year

#### Facilitator’s Activities to Support this Learning
During this training, the facilitator will engage participants in the following:

- Guide the campus through the evaluation of the previous year’s improvement plan by following a path of discussion and reflection questions with the *Plan Evaluation – Reflection Guide*.
- Utilize discussion and reflection questions to guide the campus through last year’s plan.
- Use the insight gained to support the campus in refining the next year’s plan.

#### Tools and Resources
- Online Plan Evaluation - Reflection Guide

#### Notes
The school team should explore the *Plan Evaluation – Reflection Guide* to discover insights about *each annual goal* from the previous year’s improvement plan. The Reflection Guide is structured in a “choose your own adventure” format. There is no right or wrong path.

The guidance that follows is labeled by page numbers within the online module. The corresponding page numbers in this guide will provide the appropriate scripting notes.

**Changes coming in 2017-2018:** Campuses have flexibility to use the same template they used in 16-17, the new Targeted Improvement Plan (TIP) template (both available on the Division of School Improvement website), or a template of the LEA’s choice (must be part of an established or contracted platform and contain certain required elements; contact your TEA consultant for more information).

This modules uses language contained in the 16-17 template. Language and guidance regarding the new template is also highlighted throughout the module and noted within red text boxes.
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<tr>
<td>Welcome</td>
<td>We are going to reflect on last year’s plan in order to improve this year’s planning process.</td>
<td>As we move through this module, we will answer the questions as they apply to our experience with last year’s plan, ultimately leading to some questions that will help us improve our plan for the next year.</td>
<td>TAIS 201 Training</td>
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<tr>
<td></td>
<td></td>
<td>Making Connections: Consider that the insights gleaned from this module exercise should be used to refine the campus’s continuation of the TAIS process into the next school year.</td>
<td>Welcome: Plan Evaluation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Tip: Remember that smooth implementation is aided by thorough planning.</td>
<td>Outcomes</td>
</tr>
<tr>
<td>Plan Evaluation</td>
<td></td>
<td>Did you meet your annual goals?</td>
<td>Changes Coming in 2017-18</td>
</tr>
<tr>
<td>Did you meet your annual goals?</td>
<td><strong>Guide the campus to respond with a “yes” or “no”</strong>.</td>
<td>- Let’s look at our first annual goal from last year’s plan.</td>
<td>Did You Meet Your Annual Goals?</td>
</tr>
<tr>
<td>(Page 1)</td>
<td></td>
<td>- Did we meet this goal last year?</td>
<td>Yes/No</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- What does the data indicate?</td>
<td>Back to page 1</td>
</tr>
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</table>

**Directions:** If the campus team selects “Yes” go to page 2 of the module

If the campus team selects
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<tr>
<td>What went well? (Page 2)</td>
<td>If your campus team selected “Yes”, go to page 2 and facilitate a discussion to aid the campus in exploring the success of their plan. The campus will explore their plan’s success by selecting options 1-3. Guide the campus to follow <strong>two of the three path options</strong> within this module. Directions: If the campus team selects option 1, go to page 3 of the module. If the campus team selects option 2, go to page 4 of the module.</td>
<td>Let’s reflect on how we were able to meet our annual goal.</td>
<td>What Went Well? Below is a list of options to explore regarding your plan’s success. Your PST facilitator will guide the discussion. Please explore two of the three options below.</td>
</tr>
</tbody>
</table>

- Option 1: [Link to Option 1]
- Option 2: [Link to Option 2]
- Option 3: [Link to Option 3]
<table>
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<td></td>
<td>the module.</td>
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<tr>
<td></td>
<td>If the campus team selects option 3, go to page 5 of the module.</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Next Steps: After exploring the options, go to page 6.</td>
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</table>

**OPTION 1**

**After creating a quality plan, how were you able to execute it?**

(Page 3)

If you choose **OPTION 1**:

Use the reflective questions on page 3 to guide the plan evaluation

Next Steps: After exploring the reflective questions, go back to page 2 and encourage the campus to explore one more of the activities on the “What Went Well?” (page 2).

**OPTION 1 Reflection Questions (Page 3):**

- How were you able to bring your detailed plan to life?
- Plans rarely go precisely as planned. How were you able to adjust your plan on the fly?
- How did you communicate the details of your plan to those that needed to take action?
- What other insights should be captured regarding your plans successful implementation?
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</table>
| OPTION 2 | How did you create a plan that was easy to implement? (Page 4) | If you choose OPTION 2: Use the reflective questions on page 4 to guide the plan evaluation. | **OPTION 2 Reflective Questions (Page 4):**  
- What kinds of details (who, what, where, when) aided implementation of your plan?  
- How can you be sure to include these kinds of details in your future planning?  
- How can you collect input from all stakeholder groups (parents, teachers, students, business partners, faith-based groups, etc.) in order to ensure the details in your plan best meet the school's needs?  
- What other insights should be captured regarding your school's success in action planning?  
- What is the connection between adult behaviors and student outcomes?  
- What specific adult behaviors made a positive impact on student performance? |

As evident through the Theory of Action model, it is not until educators learn and implement promising practice to positively transform classroom instruction and environment that student achievement will improve.

For more information regarding Theory of Action, please visit [http://info.k-12leadership.org/creating-a-theory-of-action](http://info.k-12leadership.org/creating-a-theory-of-action)

Next Steps: After exploring the reflective questions, go back to page 2 and encourage the campus to explore one more of the activities on the "What Went Well?" (page 2).

**Supplemental Resources:**

**Moving to Action**
Dr. Margaret Heritage
[http://www.taisresources.net/improvement-planning/](http://www.taisresources.net/improvement-planning/)

**Improvement Planning TAIS Guidance document**
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| OPTION 3 | **If you choose OPTION 3:** Use the reflective questions on page 5 to guide the plan evaluation. | **OPTION 3 Reflective Questions (Page 5):**  
- Think back to your problem statements from last year’s plan. How did you arrive at the root cause of those problems?  
- If there were more than one possible cause to each problem, how did you prioritize your actions?  
- What data were used to verify the validity of the root cause?  
- What insights from your successful root cause analysis should be captured and replicated in future years? | **Supplemental Resources:**  
**Narrowing the Focus**  
Dr. Margaret Heritage  
[http://www.taisresources.net/needs-assessment/](http://www.taisresources.net/needs-assessment/)  

**Understanding Why Problems Exist**  
Dr. Victoria Bernhardt  
[http://www.taisresources.net/data-analysis/](http://www.taisresources.net/data-analysis/)  

**Solving the Right Problem**  
Dr. Laura Lipton  
[http://www.taisresources.net/needs-assessment/](http://www.taisresources.net/needs-assessment/) |

**What was the key to determining the root cause of your school’s issues?**  
*(Page 5)*  

**Next Steps:** After exploring the reflective questions, go back to page 2 and encourage the campus to explore one more of the activities on the “What Went Well?” (page 2).
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<tr>
<td>OPTION 3</td>
<td>What was the key to determining the root cause of your school’s issues? (cont.)</td>
<td>(Page 5)</td>
<td><em>Needs Assessment</em> TAIS Guidance document:</td>
</tr>
<tr>
<td>Topic</td>
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<tr>
<td>What could have been even better? (Page 6)</td>
<td>After exploring the options from page 2, guide the campus to respond to one or more of the options on page 6. The campus will be reflecting on way to improve their planning process. Directions: If the campus team selects option 1, go to page 7 of the module. If the campus team selects option 2, go to page 8 of the module. If the campus team selects option 3, go to page 9 of the module.</td>
<td><strong>Options:</strong> 1. Were your interventions detailed enough? 2. What would have made implementation of your plan smoother? 3. How could you more effectively monitor and adjust your interventions?</td>
<td></td>
</tr>
</tbody>
</table>

Options:
1. Were your interventions detailed enough?
2. What would have made implementation of your plan smoother?
3. How could you more effectively monitor and adjust your interventions?
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</table>
| **OPTION 1** | *Use the reflective questions on page 7 to guide the plan evaluation.* | **OPTION 1 Reflective Questions (Page 7):**  
- Look back at the interventions from your plan. What details would have been useful to include? For example, timelines, person(s) responsible, and necessary resources for each intervention?  
- How can you alert all stakeholders with required actions?  
- How can you be sure that each intervention was monitored and properly adjusted?  
- What are some other ways in which we can better design the interventions in your school's plan?  
*Consideration:* Use an implementation plan to monitor and adjust your interventions. Each intervention should have a data source that could be used to monitor its success. Annual goals can be monitored throughout the year by completing a data collection pyramid. More information about the data collection pyramid can be found in the “Data Analysis” module. |  

**Supplemental Resources:**  
**Moving to Action**  
Dr. Margaret Heritage  
[http://www.taisresources.net/improvement-planning/](http://www.taisresources.net/improvement-planning/)  

**Communication**  
Dr. Andy Hargreaves  
[http://www.taisresources.net/communications/](http://www.taisresources.net/communications/)  

**Improvement Planning TAIS Guidance document**  

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**Were Your Interventions Detailed Enough?**  
Engage in a facilitated discussion with your PID regarding the questions below.  

**Reflective Questions:**  
1. Look back at the interventions from your plan. What details would have been useful to include? For example, timelines, person(s) responsible, and necessary resources for each intervention?  
2. How could you alert all stakeholders of required actions for each intervention?  
3. How could you be sure that each intervention was monitored and properly adjusted?  
4. What are some other ways in which we can better design the interventions in your school's plan?  
5. Choose the appropriate button below based on this question: Have you completed two of the three activities on the “What Could Have Been Done Better” page?  

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**OPTION 1**  
Were your interventions detailed enough?  
*(Page 7)*
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<tbody>
<tr>
<td>OPTION 1</td>
<td>Were your interventions detailed enough? (cont.) (Page 7)</td>
<td></td>
<td>More information on the data collection pyramid will be relayed in the &quot;Data Analysis&quot; module.</td>
</tr>
</tbody>
</table>

**OPTION 2**

Smooth Implementation (Page 8)

*Use the reflective questions on page 8 to guide the plan evaluation.*

**OPTION 2 Reflective Questions (Page 8):**

- What kinds of details (who, what, where, when) were missing from your plan that would have been useful during implementation?
- How can you be sure to include these kinds of details in your future planning?
- How can we make sure that each person is prepared to execute their part of the plan?
- What other insights should be captured regarding your school’s success in action planning?
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<tr>
<td>OPTION 2</td>
<td>Smoother Implementation (cont.) (Page 8)</td>
<td><strong>OPTION 2</strong> Smoother Implementation (cont.) (Page 8)</td>
<td><strong>Supplemental Resources:</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Moving to Action Dr. Margaret Heritage <a href="http://www.taisresources.net/improvement-planning/">http://www.taisresources.net/improvement-planning/</a></td>
</tr>
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</table>

**OPTION 3 Reflective Questions (Page 9):**

- How can you be sure that data is collected for each intervention?
- How can we be sure that the intervention needs adjustment?
- If changes are necessary, how do we determine the appropriate adjustments to our interventions?

*Consideration:* New interventions often begin with a dip in performance as new skills must be learned. The needs assessment tools can be useful in determining if the intervention needs to be adjusted or if the intervention requires patience as the team navigates through an

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*Use the reflective questions on page 9 to guide the plan evaluation.*
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<th>Supplemental Resources:</th>
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</table>
| OPTION 3 | Making adjustments to your plan (cont.) (Page 9) | implementation dip. If adjustments are necessary, we can determine the actions required by thinking about the stakeholder actions that need to take place in any given quarter in order to reach the quarterly goal. The interventions should be adjusted to guarantee the necessary stakeholder actions. For more information on using stakeholder actions to plan interventions, please see module 2.3 or the Quarterly Planning resource. | | Narrowing the Focus  
Dr. Margaret Heritage  
http://www.taisresources.net/needs-assessment/  
See Module 2.2 on Needs Assessment  
Moving to Action  
Dr. Margaret Heritage  
http://www.taisresources.net/improvement-planning/  
Quarterly Planning Resource:  
http://link.brightcove.com/services/player/bcpid1128969886001?bckey=AQ~~.AAAAEgPmm0E~.g4zUkO_0FT2pmjrLnv8ZqJLgXG66VTx&bctid=3836069107001 |
## Why was the Annual Goal not met?

**Topic:** After exploring the options from page 6, go to page 10 and guide the campus to respond to one or more of the options on page 10.

**Facilitation Notes:**
- If the campus team selects option 1, go to page 11 of the module.
- If the campus team selects option 2, go to page 16 of the module.
- If the campus team selects option 3, go to page 19 of the module.

**Facilitator Talking Points:**

**Options:**
1. Did you have a good plan but struggle with implementation?
2. Did you address the wrong root cause?
3. Other possibilities?

**Slide/Supporting Materials:**

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## OPTION 1

**Did you have a good plan but struggle with implementation?**

**Topic:** Did you have a good plan but struggle with implementation?

**Facilitation Notes:**

**Options:**
1. Communication issues?
2. Lack of detail/thorough planning?
3. Problems with buy-in?
4. Were course corrections made?

**Facilitation Notes:**

**Options:**
1. Communication issues?
2. Lack of detail/thorough planning?
3. Problems with buy-in?
4. Were course corrections made?
<table>
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| buy-in, go to page 14 of the module. If the campus team selects option 4, were course corrections made, go to page 15 of the module. | **OPTION 1 Reflective Questions (Page 12):**  
- Were the details of the action steps communicated to stakeholders involved in the plan? If not, how can we ensure stakeholders have all the necessary information?  
- Was the entire plan communicated to stakeholders so they can see how their work fits into the larger context? If not, how can we ensure each stakeholder understands the context of their work? |  |
| **OPTION 1 Communicating Issues? (Page 12)** | **Use the reflective questions on page 12 to guide the plan evaluation.**  
Next Step: After you have completed the reflection go to page 23 |  |

**Supplemental Resources:**  
*Communication*  
Dr. Andy Hargreaves  
[http://www.taisresources.net/communications/](http://www.taisresources.net/communications/)
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<tr>
<td>OPTION 2</td>
<td><strong>Lack of Detail?</strong>&lt;br&gt;Thorough planning (Page 13)</td>
<td><strong>Use the reflective questions on page 13 to guide the plan evaluation.</strong>&lt;br&gt;&lt;br&gt;<strong>OPTION 2 Reflective Questions (Page 13):</strong>&lt;br&gt;- Were the interventions actionable? If not, what are they lacking?&lt;br&gt;- For each intervention did you include:&lt;br&gt;  1. a timeline?&lt;br&gt;  2. required resources?&lt;br&gt;  3. person(s) responsible?&lt;br&gt;  4. a target for implementation of the intervention?&lt;br&gt;- What other details would be helpful?&lt;br&gt;- Were the interventions actionable?&lt;br&gt;- What information would have made the plan more actionable?&lt;br&gt;<strong>Consideration:</strong> Interventions should be focused on stakeholder actions. For more information, please see the <em>Quarterly Planning</em> resource.</td>
<td><strong>Supplemental Resources:</strong>&lt;br&gt;&lt;br&gt;<strong>Moving to Action</strong>&lt;br&gt;Dr. Margaret Heritage&lt;br&gt;<a href="http://www.taisresources.net/improvement-planning/">http://www.taisresources.net/improvement-planning/</a>&lt;br&gt;&lt;br&gt;<strong>Improvement Planning TAIS</strong>&lt;br&gt;Guidance document&lt;br&gt;<a href="http://tcdss.net/uploads/resources/docs/tais_improvement_planning_guidance.pdf">http://tcdss.net/uploads/resources/docs/tais_improvement_planning_guidance.pdf</a></td>
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**Next Step:** After you have completed the reflection go to page 23.
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</table>
| **OPTION 3** | Use the reflective questions on page 14 to guide the plan evaluation. Prepare to communicate the importance of stakeholder involvement. | **OPTION 3 Reflective Questions (Page 14):**  
- Were all involved stakeholders given an opportunity to inform the planning process? If not, how could the school solicit input to understand the needs of all stakeholders?  
- Were milestones of the plan communicated and/or celebrated? If not, how could you maintain the plan’s momentum and acknowledge the good work done by various stakeholders?  
- Were all involved stakeholders given an opportunity to inform the planning process?  

*Tip:* “The plan’s success will depend on the contributions of many stakeholders. The stakeholders required to carry out the plan should have input into creating the plan.” | Quarterly Planning Resource: [http://link.brightcove.com/services/player/bcid1128969886001?bckey=AQ~A4AAEpmm0E~,g4zUkO_0FT2pmjrLnUv8ZgLgXG66VTx&bctid=3836069107001](http://link.brightcove.com/services/player/bcid1128969886001?bckey=AQ~A4AAEpmm0E~,g4zUkO_0FT2pmjrLnUv8ZgLgXG66VTx&bctid=3836069107001) |

**OPTION 3 Issues with buy-in of the plan (Page 14)**

Next Step: After you have completed the reflection go to page 23

**Supplemental Resources:**

*Building Buy-In*

Dr. Laura Lipton

[http://www.taisresources.net/data-analysis/](http://www.taisresources.net/data-analysis/)
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</table>
| OPTION 4 | Make course corrections (Page 15) | Use the reflective questions on page 15 to guide the plan evaluation. | Communication  
Dr. Andy Hargreaves  
http://www.taisresources.net/communications/ |

**OPTION 4 Reflective Questions (Page 15):**

- Was data collected on each intervention? If not, how could you ensure that data is collected for each intervention?
- How can you be sure you found the correct root cause to the problem?
- What process was used to make adjustments to the plan?
- Was data collected on each intervention?
- Was a needs assessment conducted to identify the cause of any troubling data?
- Were adjustments made to the plan?
- If adjustments are necessary, determine the actions required by thinking about the stakeholder actions that need to take place in any given quarter in order to reach the quarterly goal. The interventions should be adjusted to guarantee the necessary stakeholder actions. For more information about using stakeholder actions to plan interventions please see module 2.3 or the Quarterly Planning resource.
- Consider using an implementation plan to monitor and adjust your interventions. Each intervention should have a data source that could be used to monitor its success. Annual goals can be monitored throughout the year by completing a data source.

Next Step: After you have completed the reflection go to page 23

**Supplemental Resources:**

**Narrowing the Focus**  
Dr. Margaret Heritage  
http://www.taisresources.net/needs-assessment/

**Quarterly Planning Resource:**  
http://link.brightcove.com/services/player/bcpid1128969886001?bckey=AQ~~.AAAAEGPmm0E~.g4zUkO_0FT2pmjrLnUV8ZgLgXG66VTx&bctid=3836069107001

See Module 2.2 on Needs Assessment

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TAIS 201: Module 2.1a  
18
Did you address the wrong root cause?
(Page 16)

Guide the campus to respond to one or more of the options on page 16.
Discuss the area(s) that most likely prevented the school from attaining its annual goal.

Options:
1. Was the necessary data considered?
2. Was the correct root cause identified?

Directions:
If the campus team selects option 1, was the necessary data considered, go to page 17 of the module.
If the campus team selects option 2, was the correct root cause identified, go to page 18 of the module.

More information on the data collection pyramid will be shared in the Data Analysis module.
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</table>
| OPTION 1 Reflect on the Necessary Data (Page 17) | Use the reflective question on page 17 to guide the plan evaluation. | **OPTION 1 Reflective Questions (Page 17):**  
- Were data considered for each CSF when creating problem statements? If not, how can you catalogue/organize your school's data by each CSF?  

**Consideration:** Annual goals can be monitored throughout the year by completing a data collection pyramid. More information about the data collection pyramid can be found in the “Data Analysis” module. |  

**Supplemental Resources:**  
*Doing It Right and Doing the Right Thing*  
Dr. Victoria Bernhardt  
[http://www.taisresources.net/data-analysis/](http://www.taisresources.net/data-analysis/)  

*Preparing for Data Analysis*  
Dr. Margaret Heritage  
[http://www.taisresources.net/data-analysis/](http://www.taisresources.net/data-analysis/)  

More information on the data collection pyramid will be relayed in the Data Analysis module. |
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<th>OPTION 2</th>
<th>Reflect on why the root cause was incorrect (Page 18)</th>
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<tr>
<td><strong>Facilitation Notes</strong></td>
<td>Use the reflective questions on page 18 to guide the plan evaluation. Next Step: After you have completed the reflection go to page 23</td>
</tr>
</tbody>
</table>
| **Facilitator Talking Points** | **OPTION 2 Reflective Questions (Page 18):**  
- If a detailed plan was well-executed but the goal was not achieved, examine the root cause that was identified.  
- Were the “10-5-5”, “5 Whys”, and “2 Circle” protocols used to arrive at the root cause?  
- Does data indicate you were addressing the true root cause of the problem statement you identified? |
| **Slide/Supporting Materials** | ![Slide/Supporting Materials](http://www.taisresources.net/needs-assessment/) |

**Supplemental Resources:**  
*Narrowing the Focus*  
Dr. Margaret Heritage  
[http://www.taisresources.net/needs-assessment/](http://www.taisresources.net/needs-assessment/)
### Topic: Other Possible Issues

#### (Page 19)

**Facilitation Notes:**
Guide the campus to respond to one or more of the options found on page 19.

**Directions:**
If the campus team selects option 1, unforeseen circumstances, go to page 20 of the module.
If the campus team selects option 2, goal setting, go to page 21 of the module.
If the campus team selects option 3, strategies, go to page 22 of the module.

**Facilitator Talking Points:**

**Options**
1. Unforeseen circumstances?
2. Goal setting?
3. Strategies?

**Slide/Supporting Materials**

#### OPTION 3

**Unforeseen circumstances**

**Options**
1. Unforeseen circumstances?
2. Goal setting?
3. Strategies?

**Next Step:** After you have completed the reflection go to page 23 or return to page 19 to select another option.

**OPTION 1 Reflective Questions (Page 20):**
- Were there barriers to implementation outside of your control?
- How could you build capacity to prepare for similar events in the future?

**Continuing Conversation:** Many things are outside of the school’s circle of control. Guide the team in a discussion to determine what could have been done to prepare for, or react to the unforeseen circumstance?
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<td>OPTION 2 Goal setting (Page 21)</td>
<td><strong>Use the reflective questions on page 21 to guide the plan evaluation.</strong></td>
<td><strong>OPTION 2 Reflective Questions (Page 21):</strong></td>
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|                             | Next Step: After you have completed the reflection go to page 23 or return to page 19 to select another option. | - Are the goals "SMART"?  
- Did the annual goals give clarity and direction for the plan? If not, how could the plan's elements (annual goal, quarterly goals, interventions) have been better aligned?  
- Did the quarterly goals measure the impact of the interventions for that quarter? |                             |
<p>|                             |                                                                                      | <strong>Supplemental Resources:</strong>                                                                                                                                                                                               |                             |
|                             |                                                                                      | <strong>SMART Goal guidance</strong>                                                                                                                                                                                                |                             |
|                             |                                                                                      | See Module 2.3 for information on goal setting.                                                                                                                                                                          |                             |</p>
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<td>OPTION 3 Strategies (Page 22)</td>
<td><em>Use the reflective questions on page 22 to guide the plan evaluation.</em></td>
<td><strong>OPTION 3 Reflective Questions (Page 22):</strong></td>
<td><strong>Reflect on Strategies</strong>&lt;br&gt;Engage in a facilitated discussion with your PDD regarding the questions below. Your PDD is very knowledgeable and awesome, so listen to what they have to say.&lt;br&gt;&lt;br&gt;<strong>Reflection Questions</strong>&lt;br&gt;1. Does the strategy target the root cause? If not, how can it be modified?&lt;br&gt;2. Does the strategy organize the interventions that fall under it? If not, how can it be modified?&lt;br&gt;&lt;br&gt;<strong>Consideration:</strong> Encourage the campus to utilize reflective questioning to continue to examine their improvement plan.</td>
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<td>Next Step: After you have completed the reflection go to page 23 or return to page 19 to select another option.</td>
<td><em>Tip:</em> Each intervention should be clearly related to the strategy being implemented.</td>
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