



TEXAS CENTER  
FOR DISTRICT & SCHOOL SUPPORT

## ONLINE TAIS MODULES

# Facilitator Guide

## **TAIS 201**

### Module 2.1a


#### **Content Focus:**


Data Analysis: Plan Evaluation

## Module Summary

<b>The “Big Ideas”</b>	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.
<b>Participants’ Learning/ Outcomes</b>	By the end of this training module, participants should be able to: <ul style="list-style-type: none"><li>• Diagnose the reasons for the previous year’s improvement plan’s successes and/or struggles</li><li>• Reflect on lessons learned in order to create a more successful improvement plan for the next school year</li></ul>
<b>Facilitator’s Activities to Support this Learning</b>	During this training, the facilitator will engage participants in the following: <ul style="list-style-type: none"><li>• Guide the campus through the evaluation of the previous year’s improvement plan by following a path of discussion and reflection questions with the <i>Plan Evaluation – Reflection Guide</i>.</li><li>• Utilize discussion and reflection questions to guide the campus through last year’s plan.</li><li>• Use the insight gained to support the campus in refining the next year’s plan.</li></ul>
<b>Tools and Resources</b>	<ul style="list-style-type: none"><li>• Online Plan Evaluation - Reflection Guide</li></ul>
<b>Notes</b>	<p>The school team should explore the <i>Plan Evaluation – Reflection Guide</i> to discover insights about <i>each annual goal</i> from the previous year’s improvement plan.</p> <p>The <i>Reflection Guide</i> is structured in a “choose your own adventure” format. There is no right or wrong path. The tool can be explored freely, ultimately leading to a set of reflection questions that ideally will target the needs of a school’s improvement planning process.</p> <p>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.</p> <p><b>Changes coming in 2018 – 2019:</b> Though IR2 campuses are using the current template, use of the newly revised Targeted Improvement Plan (TIP) will be required for all IR campuses in the 2018-2019 school year. To prepare campus teams for the upcoming changes, new concepts and vocabulary relevant to the revised template are highlighted, where appropriate, throughout the module.</p> <p>Upcoming changes are noted within bold, red boxes.</p>

Topic	Facilitation Notes	Facilitator Talking Points	Slide/Supporting Materials
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<p><b>Welcome</b></p>		<ul style="list-style-type: none"> <li>• We are going to reflect on last year’s plan in order to improve this year’s planning process.</li> <li>• 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.</li> </ul> <p><i>Making Connections:</i> 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.</p> <p><i>Tip:</i> Remember that smooth implementation is aided by thorough planning.</p>	<p><b>Welcome: Plan Evaluation</b></p> <p>Welcome to the plan evaluation module. Before engaging in a process of improvement planning, it is vital to reflect upon and learn from previous practice. This module offers multiple paths for participants to reflect on the successes and struggles of a targeted improvement plan.</p> <p><b>Outcomes</b></p> <ul style="list-style-type: none"> <li>• Participants will reflect upon their practices of data analysis</li> <li>• Participants will reflect upon their practices of finding the root cause of problems</li> <li>• Participants will reflect upon their practices of improvement planning</li> <li>• Participants will reflect upon their practices of implementation and monitoring of an improvement plan</li> <li>• Participants will be prepared to apply lessons learned from the past year’s improvement planning process to future improvement planning efforts</li> </ul>  <p><b>Changes Coming in 2018-19</b></p> <p>Though IR2 campuses are using the current template, use of the newly revised Targeted Improvement Plan (TIP) will be required for all IR campuses in the 2018-2019 school year. To prepare campus teams for the upcoming changes, new concepts and vocabulary relevant to the revised template are highlighted, where appropriate, throughout the module.</p>
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<p><b>Plan Evaluation</b></p> <p><b>Did you meet your annual goals?</b></p> <p><b>(Page 1)</b></p>	<p><i>Guide the campus to respond with a “yes” or “no”.</i></p> <p><i>Directions: If the campus team selects “Yes” go to page 2 of the module</i></p> <p><i>If the campus team selects</i></p>	<ul style="list-style-type: none"> <li>• Let’s look at our first annual goal from last year’s plan.</li> <li>• Did we meet this goal last year?</li> <li>• What does the data indicate?</li> </ul>	<p><b>Did You Meet Your Annual Goals?</b></p>  <p><b>Yes</b> Go to page 2</p> <p><b>No</b> Go to page 10</p> <p>Page 1</p>
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Topic	Facilitation Notes	Facilitator Talking Points	Slide/Supporting Materials
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*“No” go to page 10 of the module*

**What went well?  
(Page 2)**

*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 **two of the three path options** 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*

- Let’s reflect on how we were able to meet our annual goal.

**What Went Well?**

Below is a list of options to explore regarding your plan's success. Your PSP facilitator will guide the discussion. Please explore two of the three options below.

<p><b>Option 1</b></p>  <p>After creating a quality plan, how were you able to execute it?</p> <p><b>Option 1</b> Go to page 3</p>	<p><b>Option 2</b></p>  <p>What was the key to creating a plan that can be smoothly implemented?</p> <p><b>Option 2</b> Go to page 4</p>	<p><b>Option 3</b></p>  <p>How were you able to determine the root cause of the problems on your campus?</p> <p><b>Option 3</b> Go to page 5</p>
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Page 2 Back to Page 1

Topic	Facilitation Notes	Facilitator Talking Points	Slide/Supporting Materials
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*the module.  
If the campus team selects option 3, go to page 5 of the module.*

*Next Steps: After exploring the options, go to page 6.*

**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?

## You Executed Your Plan Well! What was your secret?

Engage in a facilitated discussion with your PSP regarding the questions below.

### Reflective Questions

1. How were you able to bring your detailed plan to life?
2. Plans rarely go precisely as planned. How were you able to adjust your plan on the fly?
3. How did you communicate the details of your plan to those that needed to take action?
4. What other insights should be captured regarding your plans successful implementation?



The insights gleaned from this exercise should be used to refine your school's 2016-2017 TAIS process. Choose the appropriate button below based on this question. Have you completed two of the three activities on the “What Went Well” page?

**Yes**  
Go to page 6

**No**  
Go to page 2

Page 3 Back to Page 2

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**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.*

*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>*

*Next Steps: After exploring the reflective questions, go back to page 2 and encourage the campus to*


- 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?

**How Did You Create a Plan that Was Easy to Implement?**

Engage in a facilitated discussion with your PSP regarding the questions below.

**Reflective Questions**

1. What kinds of details (Who, What, Where, When) aided implementation of your plan?
2. How can you be sure to include these kinds of details in your future planning?
3. 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?
4. What other insights should be captured regarding your school's success in action planning?



Choose the appropriate button below based on this question. Have you completed two of the three activities on the "What Went Well" page?

**Yes** Go to page 6      **No** Go to page 7

Page 4 Back to Page 2

**Supplemental Resources:**

*Moving to Action*  
 Dr. Margaret Heritage  
<http://www.taisresources.net/improvement-planning/>

*Improvement Planning TAIS*  
 Guidance document  
[http://tcdss.net/uploads/resources/docs/tais\\_improvement\\_planning\\_guidance.pdf](http://tcdss.net/uploads/resources/docs/tais_improvement_planning_guidance.pdf)

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**OPTION 3**  
**What was the key to determining the root cause of your school's issues? (Page 5)**

*If you choose OPTION 3:*  
 Use the reflective questions on page 5 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 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?

**What Was the Key to Determining the Root Cause of Your School's Issues?**

Engage in a facilitated discussion with your PSP regarding the questions below:

**Reflection Questions**

1. Think back to your problem statements from last year's plan. How did you arrive at the root cause of those problems?
2. If there was more than one possible cause to each problem, how did you prioritize your actions?
3. What data were used to verify the validity of the root cause?
4. What insights from your successful root cause analysis should be captured and replicated in future years?



Choose the appropriate button below based on this question: Have you completed two of the three activities on the "What Went Well" page?

**Yes**  
Go to Page 6

**No**  
Go to Page 2

Page 5 Back to Page 2

**Supplemental Resources:**


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

*Understanding Why Problems Exist*  
 Dr. Victoria Bernhardt  
<http://www.taisresources.net/data-analysis/>

*Solving the Right Problem*  
 Dr. Laura Lipton  
<http://www.taisresources.net/needs-assessment/>

Topic	Facilitation Notes	Facilitator Talking Points	Slide/Supporting Materials
<p><b>OPTION 3</b></p> <p><b>What was the key to determining the root cause of your school's issues?</b></p> <p><b>(cont.)</b></p> <p><b>(Page 5)</b></p>			<p><i>Needs Assessment</i> TAIS Guidance document:</p> <p><a href="http://tcdss.net/uploads/resources/docs/TAIS_Needs_Assessment_Guidance.pdf">http://tcdss.net/uploads/resources/docs/TAIS_Needs_Assessment_Guidance.pdf</a></p>



Topic	Facilitation Notes	Facilitator Talking Points	Slide/Supporting Materials
<p><b>What could have been even better?</b> <b>(Page 6)</b></p>	<p><i>After exploring the options from page 2, guide the campus to respond to one or more of the options on page 6.</i></p> <p><i>The campus will be reflecting on way to improve their planning process.</i></p> <p><i>Directions:</i> <i>If the campus team selects option 1, go to page 7 of the module.</i> <i>If the campus team selects option 2, go to page 8 of the module.</i> <i>If the campus team selects option 3, go to page 9 of the module.</i></p>	<p><b>Options:</b></p> <ol style="list-style-type: none"> <li>1. Were your interventions detailed enough?</li> <li>2. What would have made implementation of your plan smoother?</li> <li>3. How could you more effectively monitor and adjust your interventions?</li> </ol>	 <p>The slide is titled "What Could Have Been Even Better!". Below the title, it says "Below are paths for reflection on ways to improve your planning process. Your PSP facilitator will guide the discussion. Please explore two of the three options below." There are three options presented in columns:</p> <ul style="list-style-type: none"> <li><b>Option 1:</b> Icon of a list. Question: "Were your interventions detailed enough?". Button: "Option 1 Go to page 7".</li> <li><b>Option 2:</b> Icon of a checkmark. Question: "What would have made implementation of your plan smoother?". Button: "Option 2 Go to page 8".</li> <li><b>Option 3:</b> Icon of a magnifying glass. Question: "How could you more effectively monitor and adjust your interventions?". Button: "Option 3 Go to page 9".</li> </ul> <p>At the bottom of the slide, it says "Page 6" and "Back to Page 2".</p>

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**OPTION 1**  
**Were your interventions detailed enough?**  
**(Page 7)**

*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.

**Were Your Interventions Detailed Enough?**

Engage in a facilitated discussion with your PSP 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 involved 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?



Choose the appropriate button below based on this question. Have you completed two of the three activities on the “What Could Have Been Done Even Better” page?

**Yes**  
Go to the End

**No**  
Go to page 6

Page 7

Back to Page 6

**Supplemental Resources:**

*Moving to Action*

Dr. Margaret Heritage

<http://www.taisresources.net/improvement-planning/>

*Communication*

Dr. Andy Hargreaves

<http://www.taisresources.net/communications/>

*Improvement Planning TAIS*

Guidance document

[http://tcdss.net/uploads/resources/docs/tais\\_improvement\\_planning\\_guidance.pdf](http://tcdss.net/uploads/resources/docs/tais_improvement_planning_guidance.pdf)

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**OPTION 1**

**Were your interventions detailed enough?**

**(cont.)**

**(Page 7)**

More information on the data collection pyramid will be relayed in the “Data Analysis” module.

**OPTION 2**

**Smoother 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?

**Reflect on Implementation of the Plan**

Engage in a facilitated discussion with your PSP regarding the questions below:

**Reflection Questions**

1. What kinds of details (Who, What, Where, When) were missing from your plan that would have been useful during implementation?
2. How can you be sure to include these kinds of details in your future planning?
3. How can you make sure that each person is prepared to execute their piece of the plan?
4. What other insights should be captured regarding your school’s success in action planning?




Choose the appropriate button below based on this question: Have you completed two of the three activities on the “What Could Have Been Even Better” page?

**Yes**  
Go to Page 23

**No**  
Go to Page 6

Page 8

Back to Page 6

Topic	Facilitation Notes	Facilitator Talking Points	Slide/Supporting Materials
<p><b>OPTION 2</b></p> <p><b>Smoother Implementation</b></p> <p><b>(cont.)</b></p> <p><b>(Page 8)</b></p>			<p><b>Supplemental Resources:</b></p> <p><i>Moving to Action</i> Dr. Margaret Heritage <a href="http://www.taisresources.net/improvement-planning/">http://www.taisresources.net/improvement-planning/</a></p> <p><i>Improvement Planning</i> TAIS Guidance document <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></p>
<p><b>OPTION 3</b></p> <p><b>Making adjustments to your plan</b></p> <p><b>(Page 9)</b></p>	<p><i>Use the reflective questions on page 9 to guide the plan evaluation.</i></p>	<p><b>OPTION 3 Reflective Questions (Page 9):</b></p> <ul style="list-style-type: none"> <li>• How can you be sure that data is collected for each intervention?</li> <li>• How can we be sure that the intervention needs adjustment?</li> <li>• If changes are necessary, how do we determine the appropriate adjustments to our interventions?</li> </ul> <p><i>Consideration:</i> 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</p>	<p><b>Reflect on Making Adjustments to the Plan</b></p> <p>Engage in a facilitated discussion with your PSP regarding the questions below:</p> <p><b>Reflection Questions</b></p> <ol style="list-style-type: none"> <li>1. How can you be sure that data are collected for each intervention?</li> <li>2. How can you be sure that the intervention needs adjustment?</li> <li>3. If changes are necessary, how do you determine the appropriate adjustments to our interventions?</li> </ol>  <p>Choose the appropriate button below based on this question: Have you completed two of the three activities on the "What Could Have Been Even Better" page?</p> <p><b>Yes</b> Go to Page 23</p> <p><b>No</b> Go to Page 6</p> <p>Page 9 <span style="float: right;">Back to Page 6</span></p>

Topic	Facilitation Notes	Facilitator Talking Points	Slide/Supporting Materials
<p><b>OPTION 3</b></p> <p><b>Making adjustments to your plan (cont.)</b></p> <p><b>(Page 9)</b></p>		<p>implementation dip.</p> <p>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 <i>Quarterly Planning</i> resource.</p>	<p><b>Supplemental Resources:</b></p> <p><i>Narrowing the Focus</i> Dr. Margaret Heritage <a href="http://www.taisresources.net/needs-assessment/">http://www.taisresources.net/needs-assessment/</a></p> <p>See Module 2.2 on <i>Needs Assessment</i></p> <p>See Module 2.3 on <i>Improvement Planning</i></p> <p><i>Moving to Action</i> Dr. Margaret Heritage <a href="http://www.taisresources.net/improvement-planning/">http://www.taisresources.net/improvement-planning/</a></p> <p><i>Quarterly Planning</i> Resource: <a href="http://link.brightcove.com/services/player/bcpid1128969886001?bckey=AQ~~,AAAAEgPmm0E~,g4zUkO_0FT2pmjrLnUv8ZqJLgXG66VTx&amp;bctid=3836069107001">http://link.brightcove.com/services/player/bcpid1128969886001?bckey=AQ~~,AAAAEgPmm0E~,g4zUkO_0FT2pmjrLnUv8ZqJLgXG66VTx&amp;bctid=3836069107001</a></p>

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**Why was the Annual Goal not met?**  
(Page 10)

*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.*


*Directions:*  
*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.*

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

**Why Was the Meet Annual Goal Not Met?**

Below is a list of options to explore regarding your annual goals. Your PSP facilitator will guide the discussion. Please explore one of the three options below.


**Option 1**



Did you have a good plan but struggle with implementation?

**Option 1**  
Go to Page 11


**Option 2**



Did you address the wrong root cause?

**Option 2**  
Go to Page 16

**Option 3**



Other possibilities?

**Option 3**  
Go to Page 19

Page 10 Back to Page 1

**OPTION 1**  
**Did you have a good plan but struggle with implementation?**  
(Page 11)

*If option 1 is selected (page 11), guide the campus to respond to one or more of the options.*

*Directions:*  
*If the campus team selects option 1, communication issues, go to page 12 of the module.*  
*If the campus team selects option 2, lack of detail, go to page 13 of the module.*  
*If the campus team selects option 3, problems with*

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

**Reflect on Issues with Communication?**

Below is a list of options to explore regarding your plan. Your PSP facilitator will guide the discussion. Please explore one of the four options below.

**Option 1**



Communication issues?

**Option 1**  
Go to Page 12

**Option 2**



Lack of detail?

**Option 2**  
Go to Page 13

**Option 3**



Problems with buy-in?

**Option 3**  
Go to Page 14


**Option 4**



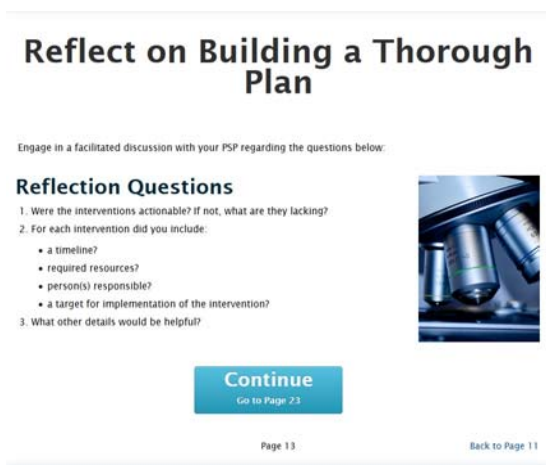
Were course corrections made?

**Option 4**  
Go to Page 15

Page 11 Back to Page 10

Topic	Facilitation Notes	Facilitator Talking Points	Slide/Supporting Materials
	<p><i>buy-in, go to page 14 of the module.</i></p> <p><i>If the campus team selects option 4, were course corrections made, go to page 15 of the module.</i></p>		
<p><b>OPTION 1 Communicati on Issues? (Page 12)</b></p>	<p><i>Use the reflective questions on page 12 to guide the plan evaluation.</i></p> <p><i>Next Step: After you have completed the reflection go to page 23</i></p>	<p><b>OPTION 1 Reflective Questions (Page 12):</b></p> <ul style="list-style-type: none"> <li>• 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?</li> <li>• 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?</li> </ul>	<p><b>Reflect on Communicating the Plan</b></p> <p>Engage in a facilitated discussion with your PSP regarding the questions below.</p> <p><b>Reflection Questions</b></p> <ol style="list-style-type: none"> <li>1. Were the details of the action steps communicated to stakeholders involved in the plan? If not, how can you ensure that the stakeholders have all the necessary information?</li> <li>2. Was the whole plan communicated to stakeholders so that they can see how their work fits into the larger context? If not, how can you ensure each stakeholder understands the context of their work?</li> </ol>  <p><b>Supplemental Resources:</b></p> <p><i>Communication</i> Dr. Andy Hargreaves <a href="http://www.taisresources.net/communications/">http://www.taisresources.net/communications/</a></p>



Topic	Facilitation Notes	Facilitator Talking Points	Slide/Supporting Materials
<p><b>OPTION 2</b></p> <p><b>Lack of Detail?</b></p> <p><b>Thorough planning (Page 13)</b></p>	<p><i>Use the reflective questions on page 13 to guide the plan evaluation.</i></p> <p><i>Next Step: After you have completed the reflection go to page 23</i></p>	<p><b>OPTION 2 Reflective Questions (Page 13):</b></p> <ul style="list-style-type: none"> <li>• Were the interventions actionable? If not, what are they lacking?</li> <li>• For each intervention did you include:             <ol style="list-style-type: none"> <li>1. a timeline?</li> <li>2. required resources?</li> <li>3. person(s) responsible?</li> <li>4. a target for implementation of the intervention?</li> </ol> </li> <li>• What other details would be helpful?</li> <li>• Were the interventions actionable?</li> <li>• What information would have made the plan more actionable?</li> </ul> <p><i>Consideration:</i> Interventions should be focused on stakeholder actions. For more information, please see the <i>Quarterly Planning</i> resource.</p>	 <p><b>Reflect on Building a Thorough Plan</b></p> <p>Engage in a facilitated discussion with your PSP regarding the questions below:</p> <p><b>Reflection Questions</b></p> <ol style="list-style-type: none"> <li>1. Were the interventions actionable? If not, what are they lacking?</li> <li>2. For each intervention did you include:             <ul style="list-style-type: none"> <li>• a timeline?</li> <li>• required resources?</li> <li>• person(s) responsible?</li> <li>• a target for implementation of the intervention?</li> </ul> </li> <li>3. What other details would be helpful?</li> </ol> <p><b>Continue</b> Go to Page 23</p> <p>Page 13 <span style="float: right;">Back to Page 11</span></p>
<p><b>Thorough planning (cont.)</b></p>			<p><b>Supplemental Resources:</b></p> <p><i>Moving to Action</i> Dr. Margaret Heritage <a href="http://www.taisresources.net/improvement-planning/">http://www.taisresources.net/improvement-planning/</a></p> <p><i>Improvement Planning TAIS</i> Guidance document <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></p>



Topic	Facilitation Notes	Facilitator Talking Points	Slide/Supporting Materials
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Quarterly Planning Resource:  
[http://link.brightcove.com/services/player/bcpid1128969886001?bckey=AQ~~,AAAAEgPmm0E~,g4zUkO\\_0FT2pmjrLnUv8ZqJLgXG66VTx&bctid=3836069107001](http://link.brightcove.com/services/player/bcpid1128969886001?bckey=AQ~~,AAAAEgPmm0E~,g4zUkO_0FT2pmjrLnUv8ZqJLgXG66VTx&bctid=3836069107001)

See Module 2.3 on *Improvement Planning*.

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

*Use the reflective questions on page 14 to guide the plan evaluation.*  
*Prepare to communicate the importance of stakeholder involvement.*

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

**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.”

**Reflect on Buy-In for the Plan**

Engage in a facilitated discussion with your PSP regarding the questions below:

**Reflection Questions**

1. 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?
2. 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?



Remember, the plan’s success will depend on the contributions of many stakeholders. Stakeholders that are required to carry out the plan should have input into creating the plan.

**Continue**  
 Go to Page 23

Page 14

Back to Page 11

**Supplemental Resources:**

*Building Buy-In*  
 Dr. Laura Lipton  
<http://www.taisresources.net/data-analysis/>

Topic	Facilitation Notes	Facilitator Talking Points	Slide/Supporting Materials
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**OPTION 4**  
**Make course**  
**corrections**  
**(Page 15)**

*Use the reflective questions on page 15 to guide the plan evaluation.*

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

**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

*Communication*  
 Dr. Andy Hargreaves  
<http://www.taisresources.net/communications/>

**Reflect on Making Adjustments to the Plan**

Engage in a facilitated discussion with your PSP regarding the questions below.

**Reflection Questions**

1. Were data collected on each intervention? If not, how could you ensure that data is collected for each intervention?
2. How can you be sure that you found the correct root cause to the problem?
3. What process was used to make adjustments to the plan?

**Continue**  
Go to Page 23

Page 15 Back to Page 11

**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\\_0FT2pmjrLnUv8ZqJLgXG66VTx&bctid=3836069107001](http://link.brightcove.com/services/player/bcpid1128969886001?bckey=AQ~~,AAAAEgPmm0E~,g4zUkO_0FT2pmjrLnUv8ZqJLgXG66VTx&bctid=3836069107001)

See Module 2.2 on *Needs Assessment*

Topic	Facilitation Notes	Facilitator Talking Points	Slide/Supporting Materials
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**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.*

*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.*

collection pyramid. More information about the data collection pyramid can be found in the “Data Analysis” module.

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

See Module 2.3 on *Improvement Planning*

More information on the data collection pyramid will be shared in the Data Analysis module.

### What Led to an Incorrect Root Cause?

Below is a list of options to explore regarding your annual goals. Your PSP facilitator will guide the discussion. Please explore one of the two options below.

**Option 1**



Was the necessary data considered?

**Option 1**  
Go to Page 17

**Option 2**



Was the correct root cause identified?

**Option 2**  
Go to Page 18

Page 16 Back to Page 10

Topic	Facilitation Notes	Facilitator Talking Points	Slide/Supporting Materials
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**OPTION 1**  
**Reflect on the Necessary Data**  
**(Page 17)**

*Use the reflective question on page 17 to guide the plan evaluation.*

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

**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.

**Reflect on the Necessary Data**

Engage in a facilitated discussion with your PSP regarding the questions below:

**Reflection Questions**

1. Were data for each CSF considered to create problem statements? If not, how could you catalogue/organize your school's data by each CSF?

**Continue**  
Go to Page 23

Page 17 Back to Page 16

**Supplemental Resources:**

*Doing It Right and Doing the Right Thing*

Dr. Victoria Bernhardt

<http://www.taisresources.net/data-analysis/>

*Preparing for Data Analysis*

Dr. Margaret Heritage

<http://www.taisresources.net/data-analysis/>

More information on the data collection pyramid will be relayed in the Data Analysis module.

## Topic

## Facilitation Notes

## Facilitator Talking Points

## Slide/Supporting Materials

### OPTION 2 Reflect on why the root cause was incorrect (Page 18)

*Use the reflective questions on page 18 to guide the plan evaluation.*

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

### 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?

### Reflect on Why the Root Cause Was Incorrect

Engage in a facilitated discussion with your PSP regarding the questions below.

#### Reflection Questions

1. If a detailed plan was well-executed but the goal was not achieved, examine the root cause that was identified.
2. Were the 10-5-5, 5 Why, and 2 Circle protocols used to arrive at the root cause?
3. Does the data indicate that you were addressing the true root cause of the problem statement you identified?



Continue

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Page 18

Back to Page 16

### Supplemental Resources:

*Narrowing the Focus*

Dr. Margaret Heritage

<http://www.taisresources.net/needs-assessment/>

See Module 2.2 on *Needs Assessment*

Topic	Facilitation Notes	Facilitator Talking Points	Slide/Supporting Materials
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**OPTION 3**  
**Other Possible Issues**  
**(Page 19)**

*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.*

**Options**

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

**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?

**OPTION 1**  
**Unforeseen circumstances**  
**(Page 20)**


*Use the reflective questions on page 20 to guide the plan evaluation.*

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

### Other Possible Issues

Below is a list of options to explore regarding your annual goals. Your PSP facilitator will guide the discussion. Please explore one of the three options below:

**Option 1**



Unforeseen circumstances

Option 1  
Go to Page 20


**Option 2**



Goal setting

Option 2  
Go to Page 21

**Option 3**



Strategies

Option 3  
Go to Page 22

Page 19 Back to Page 10

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### Reflect on Unforeseen Circumstances

Engage in a facilitated discussion with your PSP regarding the questions below:

**Reflection Questions**

1. Were there barriers to implementation that were outside of your control?
2. How could you build capacity to prepare for similar events in the future?



Continue  
Go to Page 23

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Topic	Facilitation Notes	Facilitator Talking Points	Slide/Supporting Materials
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**OPTION 2  
Goal setting  
(Page 21)**

*Use the reflective questions on page 21 to guide the plan evaluation.*

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

**OPTION 2 Reflective Questions (Page 21):**

- 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?

### Reflect on Goal Setting

Engage in a facilitated discussion with your PSP regarding the questions below:

**Reflection Questions**

1. Are the goals "SMART"?
2. Did the annual goals give clarity and direction for the plan? If not, how could the plan's elements (annual goal, quarterly goals, interventions) been better aligned?
3. Did the quarterly goals measure the impact of the interventions for that quarter?



Choose the appropriate button below based on this question. Have you completed two of the four activities on the "Other Possibilities" page?

**Continue**  
Go to Page 23


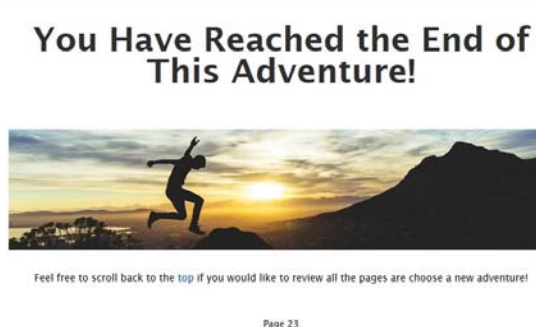
Page 21 Back to Page 19

**Supplemental Resources:**

*SMART Goal guidance*  
[http://tcdss.net/uploads/resources/docs/SMART\\_Goals.pdf](http://tcdss.net/uploads/resources/docs/SMART_Goals.pdf)

See Module 2.3 for information on goal setting.



Topic	Facilitation Notes	Facilitator Talking Points	Slide/Supporting Materials
<p><b>OPTION 3 Strategies (Page 22)</b></p>	<p><i>Use the reflective questions on page 22 to guide the plan evaluation.</i></p> <p><i>Next Step: After you have completed the reflection go to page 23 or return to page 19 to select another option.</i></p>	<p><b>OPTION 3 Reflective Questions (Page 22):</b></p> <ul style="list-style-type: none"> <li>• Does the strategy target the root cause? If not, how can it be modified?</li> <li>• Does the strategy organize the interventions that fall under it? If not, how can it be modified?</li> </ul> <p><i>Tip: Each intervention should be clearly related to the strategy being implemented.</i></p>	 <p><b>Reflect on Strategies</b></p> <p>Engage in a facilitated discussion with your PSP regarding the questions below. Your PSP is very knowledgeable and awesome, so listen to what they have to say.</p> <p><b>Reflection Questions</b></p> <ol style="list-style-type: none"> <li>1. Does the strategy target the root cause? if not, how could it be modified?</li> <li>2. Does the strategy organize the interventions that fall under it? if not, how could it be modified?</li> </ol> <p><a href="#">Continue</a> Go to Page 23</p> <p>Page 22 <span style="float: right;">Back to Page 19</span></p> <p>See Module 2.3 for information on goal setting.</p>
<p><b>You have reached the end of this adventure! (Page 23)</b></p>		<p><i>Consideration:</i> Encourage the campus to utilize reflective questioning to continue to examine their improvement plan.</p>	 <p><b>You Have Reached the End of This Adventure!</b></p> <p>Feel free to scroll back to the top if you would like to review all the pages are choose a new adventure!</p> <p>Page 23</p>