



TEXAS CENTER  
FOR DISTRICT & SCHOOL SUPPORT

ONLINE TAIS MODULES

# Facilitator Guide

## TAIS 201

Module 2.3

### **Content Focus:**

Annual goals, strategies, quarterly planning, interventions, and data collection.

## Module Summary

**The “Big Ideas”** Providing tools and a process to develop annual goals, strategies, quarterly planning, interventions, and data collection.

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

- Create annual goals to address each problem statement
- Determine a strategy for each root cause
- Decide on quarterly goals for each annual goal
- Identify interventions for each quarterly goal
- Define data sets for each intervention

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

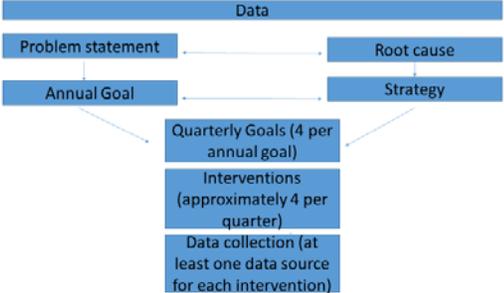
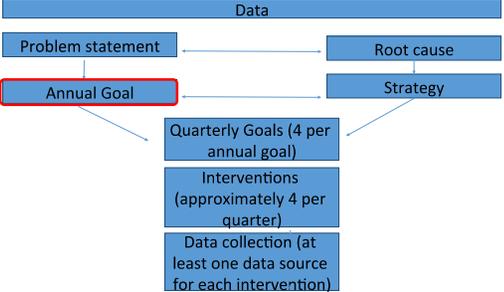
- Reflection
- Group Discussion
- Guided Interactive Exercises
- Targeted Improvement Plan Creation

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**Tools and Resources**

- Targeted Improvement Plan
- Anchor Chart
- Stakeholder Behavior Chart

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Topic	Facilitation Notes	Facilitator Talking Points	Slide/Supporting Materials
Welcome		<ul style="list-style-type: none"> <li>Welcome audience.</li> <li>Thank you for attending the 2016 Texas Accountability Intervention Systems training.</li> </ul>	Welcome page on module
Objectives	<p><i>Show Welcome Page on module</i></p> <p><i>Handout the Anchor Chart</i></p>	<ul style="list-style-type: none"> <li>This module will primarily address quarterly planning and is particularly helpful for PSPs serving campuses moving into year two.</li> <li>This module will achieve the following purposes:               <ul style="list-style-type: none"> <li>First, it will allow participants to practice the process for developing quarterly goals and interventions based on their determined root causes. It will also help participants to make foundational connections to problem statements. We will accomplish these purposes by achieving the following objectives [<i>speak to the objectives on the screen</i>]</li> </ul> </li> <li>Explain that it will be referenced throughout this module.</li> <li>Are there any questions over today's module?</li> </ul>	 <p>The diagram is a flowchart titled 'Data'. At the top is a box labeled 'Data'. Below it are two boxes: 'Problem statement' on the left and 'Root cause' on the right, connected by a double-headed arrow. Below these are two boxes: 'Annual Goal' on the left and 'Strategy' on the right, also connected by a double-headed arrow. Arrows point from 'Annual Goal' and 'Strategy' to a central column of three boxes: 'Quarterly Goals (4 per annual goal)', 'Interventions (approximately 4 per quarter)', and 'Data collection (at least one data source for each intervention)'.</p>
Annual Goal	<p><i>PLAY VIDEO</i></p> <p><i>Allow teams to table talk about each, then have them shout out responses.</i></p> <p><i>Refer to the anchor chart</i></p>	<p>Facilitator talking points after the video:</p> <ul style="list-style-type: none"> <li>Engage in the Activity</li> <li>Walk them through each statement and discuss why it is or isn't a good goal</li> </ul>	<p>Video</p> <p>Interactive Quiz</p>  <p>This diagram is identical to the one in the previous row, but the 'Annual Goal' box is highlighted with a red border.</p>

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

*PLAY VIDEO*

*Circulate the room and assist groups as needed in creating strategies.*

*Refer to the anchor chart*

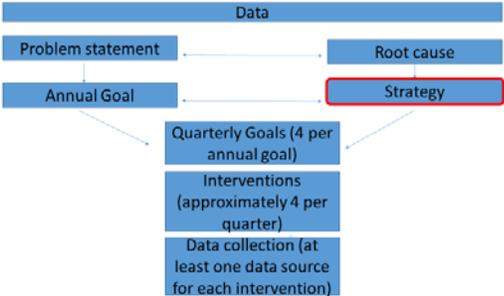
Facilitator talking points after the video:

- The strategy is the broad, overarching approach to address each root cause.
- Strategies may include systems, models, or processes that address the root cause.
- Are there any questions regarding what you just saw?
- Using the criteria that we just reviewed, spend time with your team crafting strategies in your Targeted Improvement Plan.

Continuing Conversation:

- Facilitator may touch on these points as necessary based on table conversations:
  - The strategy is how we are going to address the root cause.
  - The strategy focuses the direction of interventions – all interventions are under the umbrella of the strategy. It is important that the implementation of the strategy is a focus throughout the entire year.
  - The strategy addresses the root cause and is the method for achieving the annual goal. The interventions will be the action step that will lead to full implementation of the strategy.
  - A strategy is not one focused event or checklist (e.g., provide PD, have a

**Slide/Supporting Materials**



Video

Targeted Improvement Plan

Targeted Improvement Plan

Year/Year 1	Year 2	Year 3	Year 4
<ul style="list-style-type: none"> <li>2) No. of... (2)</li> <li>3) No. of... (2)</li> <li>4) No. of... (2)</li> <li>5) No. of... (2)</li> </ul>	<ul style="list-style-type: none"> <li>6) No. of... (2)</li> <li>7) No. of... (2)</li> <li>8) No. of... (2)</li> <li>9) No. of... (2)</li> </ul>	<ul style="list-style-type: none"> <li>10) No. of... (2)</li> <li>11) No. of... (2)</li> <li>12) No. of... (2)</li> <li>13) No. of... (2)</li> </ul>	<ul style="list-style-type: none"> <li>14) No. of... (2)</li> <li>15) No. of... (2)</li> <li>16) No. of... (2)</li> <li>17) No. of... (2)</li> </ul>
<p>Interventions by Quarter</p>			

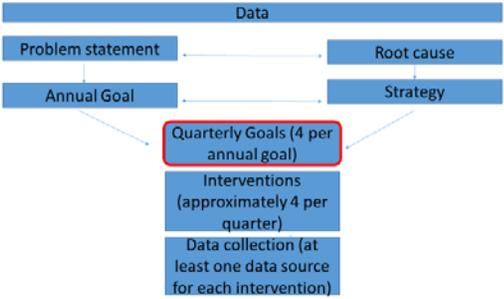
Topic	Facilitation Notes	Facilitator Talking Points	Slide/Supporting Materials
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- parent night, buy more books, etc.)
- o A strategy is not so broad that it doesn't have any focus (e.g., provide better instruction (how?), ensure students come to school (how?), buy resources (what/why?))

**Quarterly Goals**

*PLAY VIDEO*  
*Facilitate quiz*  
*Allow teams to table talk about each example, then have them shout out responses.*  
*Refer to the anchor chart*

- Facilitator talking points after the video:
- Quarterly goals help to make the annual goal achievable by engaging in a process that is data-driven
  - A quarterly goal should be a target for strategy implementation.
  - A quarterly goal should contribute to the execution of the strategy.
  - When all four quarters are complete, the strategy should be implemented and result in successfully accomplishing the annual goal.
  - It should focus on a change in stakeholder behavior.
  - A quarterly goal is not a checklist of activities to complete rather they are results-based goals geared towards achieving positive outcomes through changes in stakeholder behaviors.
  - Similar to annual goals, quarterly goals should be SMART.
  - The necessity of achieving quarterly goals is critical to the success of your plan and your students.
  - Quarterly goals should be causes for



Video  
 Interactive Quiz

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

- Are there any questions over what you just saw? Before you craft your quarterly goals, let's take a quiz on the attributes of quarterly goals.

- Are there any questions over what you just saw?

Facilitator talking points after the video:

- Determine what order those behaviors would take place in and number them
- Break those tasks up and divide them into quarters, as they would fall chronologically.
- Craft quarterly goals that encompasses all of the stakeholder behaviors for each quarter

Continuing Conversation:

- Facilitator may touch on these points as necessary based on table conversations:

- “Begin by thinking of the annual goal. What behaviors are necessary from EACH stakeholder group over the course of the year? List out those behaviors for each stakeholder group. After you have compiled a complete list of stakeholder behaviors, place them all in chronological order on a single timeline. Some tasks will repeat or be ongoing.” Remember to hold them accountable to the points the video discussed.
- Asking yourself WHO needs to do WHAT in order to successfully implement the strategy.
- What stakeholders do you have on your campus that are necessary to the successful implementation of the strategy?
- Keep in mind that students are stakeholder

**Quarterly Goals Part Activity**

*PLAY VIDEO*

*Circulate the room and assist groups as needed in creating quarterly goals.*

*Check the quality of their written goals by going through the following questions*

*Handout Stakeholder Behavior Chart*

**Video**

Annual Goal:  
Root Cause:  
Strategy:

Administrative Team	Teacher-Learning	Teacher-Practice	Student-Learning	Instructional Coaches	District BE/ESL Department

**Targeted Improvement Plan**

Targeted Improvement Plan

Interventions by Quarter					
Q1 (Aug - Nov, 2022)	Q2 (Dec - Feb, 2023)	Q3 (Mar - May, 2023)	Q4 (Jun - Aug, 2023)	Q1 (Aug - Nov, 2023)	Q2 (Dec - Feb, 2024)

**Interactive quiz**



Topic	Facilitation Notes	Facilitator Talking Points	Slide/Supporting Materials
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too

- Next, regardless of stakeholder, order the actions/behaviors in the order that they need to happen.
- What has to be done first, second, etc.?
- Notice some stakeholders may have same actions. In this example they are ordered with the same number because both stakeholder groups will be doing them together.
- However, it could be that there are different numbers for different stakeholder groups on same action because different groups will take the lead at different times.
- You will begin looking at actions and finding the natural breaks and what would make sense on your campus taking into account the months accounted for in the quarter.
- Notice that the work is not simply divided evenly among the quarter and this list may grow or change.
- You could come back to this as an anchor as you continue to implement and adjust your plan throughout the year.

Now that we have all of our stakeholder behaviors and actions grouped by what we are going to do each quarter – we need to set goals for each quarter. Statements that specifically capture the measurable results/outcomes of our work. The quarterly goal is how we will know that we are on track.



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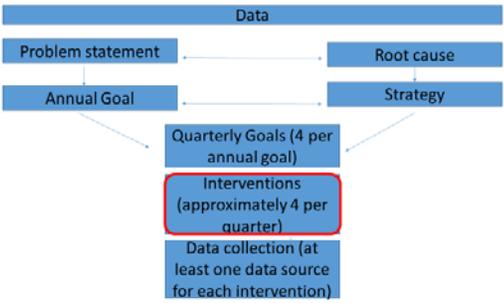
**Interventions**

*PLAY VIDEO*  
*Circulate the room and assist groups as needed*  
*Refer to the anchor chart*

- Interventions are the action steps or behaviors of stakeholders. Many of which have already been created and included on the timeline.
- Align interventions in order to accomplish quarterly goals.
- How will you measure success? Consider data sources aligned to each intervention.
- Be aware of the distinction between interventions and strategies.
- Interventions are the steps taken to achieve the strategy.
- Talk with your table about what you notice about interventions.
- Using the criteria that we just reviewed, spend time with your team crafting interventions in your Targeted Improvement Plan.

**Continuing Conversation:**

- Facilitator may touch on these points as necessary based on table conversations:
  - Be mindful of the interventions and how they support the quarterly goal.
  - Keep in mind that interventions need to be smaller steps or activities strategies are big over-arching approaches.
  - Let's go back to our ordered stakeholder behaviors/actions when we were developing quarterly goals.
  - There is no magic in 4 interventions
  - Multiple behaviors could be combined to develop one intervention
  - One behavior could result in multiple interventions



**Targeted Improvement Plan**

Targeted Improvement Plan

	Q1 (Jan - Mar, 2022)	Q2 (Apr - Jun, 2022)	Q3 (Jul - Sep, 2022)	Q4 (Oct - Dec, 2022)
Intervention				

Topic	Facilitation Notes	Facilitator Talking Points	Slide/Supporting Materials
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- Sometimes additional details will need to be added to a behavior in order to develop an intervention
- Multiple data sources could be used to measure the impact of an intervention

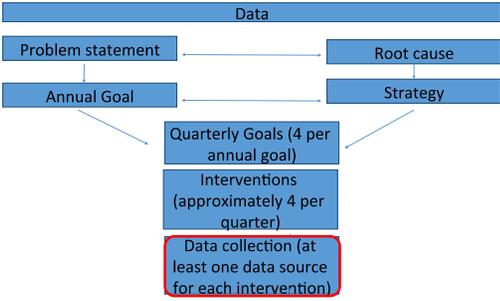
**Data Collection Activity**

*There is no video. The facilitator will be responsible for conveying the information on the module. Also use the talking points to communicate the necessary information regarding data collection. Circulate the room and assist groups as needed Refer to the anchor chart*

Continuing Conversation:

- Facilitator may touch on these points as necessary based on table conversations:
  - Like we have mentioned earlier, each of the interventions must have at least one data source that can be used to measure progress.
  - It is wonderful if you have more than one data source, but you MUST have at least one.
- Using the criteria that we just reviewed, spend time with your team identifying data sources in your Targeted Improvement Plan.

Targeted Improvement Plan



Targeted Improvement Plan

What data will be collected to measure intervention?	What data will be collected to monitor intervention?	What data will be collected to measure intervention?	What data will be collected to monitor intervention?

Topic	Facilitation Notes	Facilitator Talking Points	Slide/Supporting Materials
<p><b>Next Steps</b></p> <p><b>Completion Form</b></p>		<ul style="list-style-type: none"> <li>• Contact Info</li> <li>• Reference to TAISresources as a supporting resource</li> <li>• Reference to TCDSS for more information related to trainings and support</li> <li>• This concludes module 2.3. Next steps are to complete and submit your targeted improvement plan by the submission date, begin implementation of quarterly goals.</li> <li>• Complete the Completion Form</li> </ul>	