

Districtwide SEL
**Action
Planning
Workbook**

DISTRICT

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CASEL’s Districtwide SEL Action Planning Workbook

The process of districtwide SEL implementation begins with [foundational learning](#), a thoughtful vision and goals, reflection on current and past SEL-aligned work, and a well-informed plan to implement SEL and measure progress over time. Once district leaders have built a shared understanding of SEL, teams can use this workbook to organize priorities and goals and build a robust action plan to guide their work and exploration of the District Resource Center at drc.casel.org.

Systemic SEL implementation has continuous improvement as its foundation.

To implement high-quality systemic SEL, your team will engage in a process of continuous improvement. This process helps you start with the end in mind and create a plan that helps reach these goals. The figure below illustrates CASEL’s process for districtwide systemic SEL implementation.

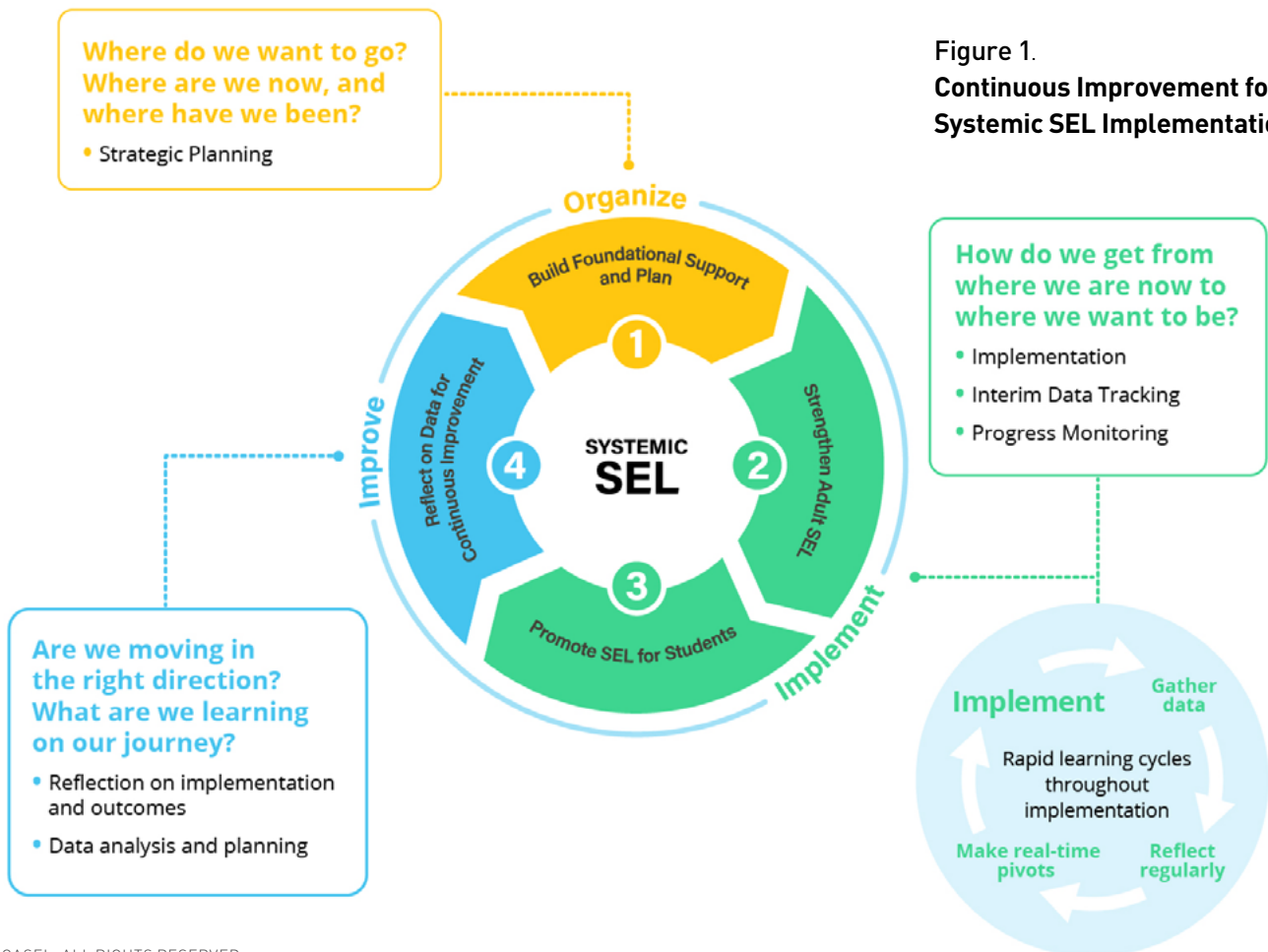


Figure 1. Continuous Improvement for Systemic SEL Implementation

Key questions underlying the SEL implementation process:

- **Where do we want to go?**
- **Where are we now, and where have we been?**
- **How do we get from where we are now to where we want to be?**
- **Are we moving in the right direction? What are we learning on our journey?**

To strategically plan for the journey of districtwide SEL, we begin with the end in mind by setting a **vision** and **long-term goals** for where we ultimately want to go.

Next, we need to understand our starting point: **Assess current level of implementation, needs, and resources** to understand where we are now and where we have been.

Then, a long-term **implementation roadmap** helps create a path to get from where we are now to where we want to be and offers mile markers that help us know we're staying on track.

Finally, our **short-term goals and action plan** gets us headed in the right direction.

All along the way, robust continuous improvement processes will help us reflect on whether we're moving in the right direction and what we're learning on our journey.

The following tools will help your district team answer each of these questions as you establish your [vision](#), [goals](#), [roadmap](#), and [action plan](#) for systemic SEL implementation (for a parallel process designed for use at the school level, see the [CASEL Guide to Schoolwide SEL: Create a Plan](#)). Each tool includes examples that follow the process of a hypothetical school district that reflects the experience and aims of many of the districts CASEL has worked with to develop SEL implementation action plans.

This process of strategically planning for districtwide SEL implementation can take anywhere from a month to a year to complete, but can take place concurrently as you take other initial steps such as allocating funds and personnel, adjusting organizational structure to promote collaboration in the central office, building central office expertise in SEL, and communicating about SEL as a district priority.

Tools to Guide the Process

Use the embedded links below to navigate to each tool within CASEL's Action Planning Workbook.

Where do we want to go?

Shared Vision (p.5)

A shared vision clarifies what you are striving toward and reflects what your district values as critical to students' education

Long-Term Goals (p.10)

Long-term goals translate the vision into measurable outcomes and outline what the SEL team aims to accomplish in 3-5 years

Where are we now? Where have we been?

Needs and Resources Assessment

- **Rubric (p.23)**
- **Program and Initiative Inventory (p.17)**

CASEL's Rubric and an initiative inventory provides a robust understanding of the current status of SEL in the district.

How do we get from where we are now to where we want to be?

Implementation Roadmap (p.34)

A long-term roadmap builds the bridge between the current status and the long-term vision and goals for SEL

Short-Term Goals and One-Year Action Plan (p.39)

Short-term goals describe the outcomes the district hopes to accomplish this year. The action plan details the steps taken and data used to monitor progress and reflect for continuous improvement.

Continuous improvement processes throughout implementation help us determine:
Are we moving in the right direction? What are we learning on our journey?

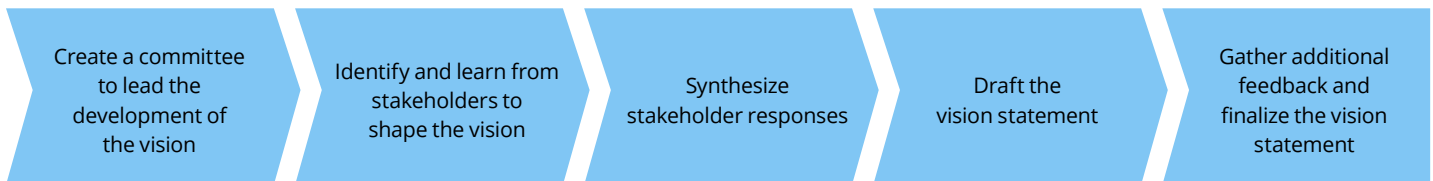


TOOL 1: Create a Shared Vision

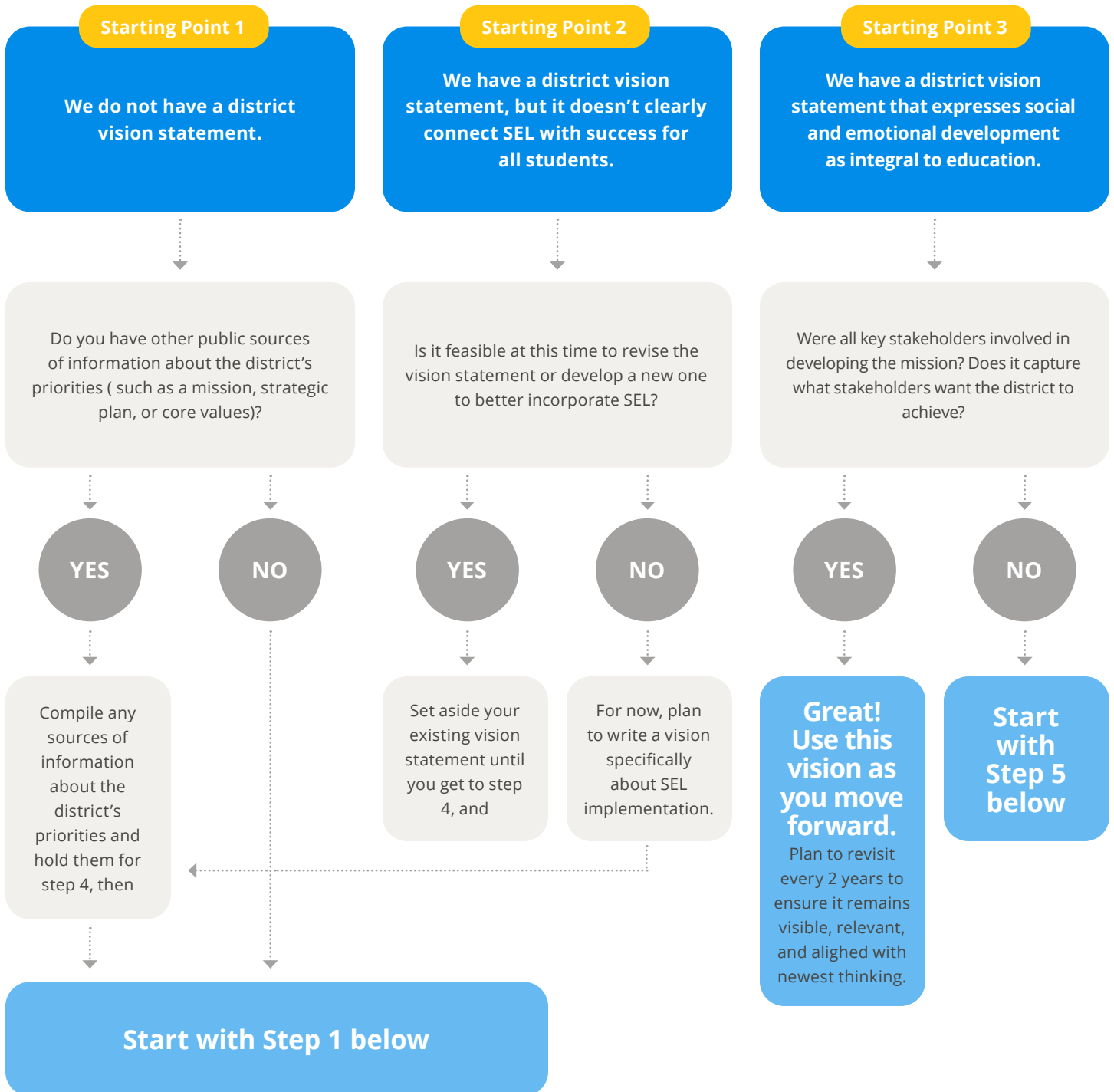
Estimated time for completion	Active committee meeting time is likely 6-10 hours, plus additional time for stakeholder communication and any facilitated stakeholder input sessions. Since publishing a district vision can take significant time for approval, consider moving ahead once you have a strong draft.
Materials needed	Existing district vision, mission statement, core values, or other documentation of district priorities.

Districtwide SEL implementation begins with the development of a shared vision that clarifies what you are striving toward and reflects what your district values as critical to students' education. Ideally, this is an overarching vision that guides and aligns all district work for students. Alternately, you may wish to develop a vision specifically for SEL implementation. Either way, **this shared vision will be the anchor for your district's SEL-related goals, plans, allocation of resources, and continuous improvement.**

This tool will take you through the following stages:



You can use the process outlined here to develop a new vision statement or revisit an existing one. Review your district’s vision statement. Then use this decision tree to determine an appropriate starting point.



Step 1: Create a committee to lead the development of the vision statement.

Whether you're developing an overarching districtwide vision or a vision specifically for SEL implementation, you'll want to bring together a committee to drive the work. Consider committee members from all areas: superintendent's staff, those with strong project management skills, communications staff, staff who regularly engage with schools, student leaders, and community members. Clearly communicate the group's responsibilities, how you'll work together, and the timeline for the work. Some of the roles you may want to consider are:

Role	Names of committee members
Lead/Project Manager (oversees the timeline and plan and ensures the team stays on track)	
Writer(s) (captures notes and summarizes stakeholders' responses; develops language for vision)	
Stakeholder engagement (oversees outreach, planning, and engagement with stakeholders. Consider student committee members to support this responsibility!)	

Step 2: Identify and learn from stakeholders to shape the vision.

When identifying stakeholders to participate in the visioning process, ensure that all perspectives are considered, not only those who already have decision-making power in the district. Use the recommended list below to identify stakeholders who represent diverse perspectives. At this stage, it is beneficial to gather a number of stakeholders that you have the capacity to speak with in person, whether individually or in focus groups. At step 5, you'll have the opportunity to seek wider stakeholder feedback. If you are working with an existing vision statement rather than writing a new one, you can skip ahead to step 5.

- **Senior leaders** (i.e., superintendent or designee, board members, cabinet members, department heads)
- **Representation across key departments** (e.g. SEL, academic content areas, student services, school improvement, equity, professional learning, health/wellness)
- **School-level representation** (principals, teachers, other staff)
- **Union representation**
- **Families**
- **Community members and leaders of community-based organizations that partner with the district**
- **Students**



You may want to set up small discussion groups, individual interviews, or large group brainstorms with activities like a gallery walk, think-pair-share, etc. To increase participation and align efforts, consider bringing questions before stakeholders through community events that are already scheduled to take place. Plan questions that ask stakeholders to think about how they want the district to support students. Here are some questions to get you started:

Sample Discussion Questions for Stakeholders

What do we want all students to know and be able to do upon graduation?

What kind of skill-building do you believe is most important in supporting our students to reach their full potential?

What do we want all schools in our district to feel like, sound like, look like? How should students be supported academically, socially, and emotionally?

What do you want our district to look like in 3 years? 5 years? 10 years?

The district has made a commitment to [include here SEL-related text from public district sources, such as core values, strategic plan, mission, etc.]. What does this mean to you?

As our district focuses on bringing social and emotional learning into the school day, how do you hope it will impact students, the learning environment, and the larger community?

Step 3: Synthesize stakeholder responses.

Compile notes, artifacts, recordings, or survey responses from step 2, and review as a committee to discuss:

- What are the major themes that emerged from stakeholder responses?
- What words and phrases did we hear that best describe what we want students to know and do by the time they graduate?
- What words and phrases did we hear that would best paint the picture of a school that will cultivate this kind of graduate?
- How do these themes, words, and phrases connect to academic, social, and emotional learning?

Record themes, words, and phrases on chart paper or on a screen so committee members can confirm that all stakeholders' views are accurately represented as they are synthesized.

Step 4: Draft the vision statement.

The writer(s) can now take the themes and phrases and craft them into a vision statement. You may want to draw upon words, phrases, or themes from other sources (mission, strategic plan, core values, etc.) to write a vision statement that is consistent with other district plans. Consider drafting a few versions. Here’s a quick checklist to help keep the vision on the right track:

- The views of stakeholders are accurately represented in the statement.
- Stakeholder input was collected and incorporated in an equitable way.
- The statement paints a clear picture of student success.
- The statement captures how the district and schools will support students in developing academically, socially, and emotionally.
- Language is accessible and memorable.

Step 5: Gather stakeholder feedback and finalize the vision statement.

Whether you are working with a draft vision statement from step 4 or an existing statement, bring in a broad coalition of stakeholders to review, adjust, and approve this key statement, as it will later drive action planning for systemic SEL implementation. Determine which senior leaders should review the statement prior to seeking feedback districtwide. Then, reconnect with stakeholders from step 2 or a broader group of stakeholders to find out what the vision statement means to them and whether it matches what they believe to be important and compelling. If sharing the draft with a large group, request feedback by email or through an online collaboration tool. Share a timeline for finalizing the vision statement and inform participants whether they’ll see another version before it is published.

Questions for feedback on draft

Does this vision statement reflect what you believe is most important in supporting our students to reach their full potential? Please share a bit about your answer.

Does this vision statement capture what you believe the district should be striving for? Please share a bit about your answer.

Which words, phrases, or sentences are most important?

Which words, phrases, or sentences spark questions or concerns?

What, if anything, would you add to this vision statement?

If you began with step 1, bring the committee back together to review feedback and incorporate outstanding points. Finalize your vision statement or repeat this process as needed. If you are recommending revisions to an existing vision statement, provide district decision-makers (e.g., communications team, senior leaders) with a summary of stakeholder feedback and one or more revised versions for approval.

Example: District Shared Vision

Our district will provide a world-class education that prepares all students academically, socially, and emotionally to be caring and contributing students, family members, friends, and civically engaged community members.

With your final shared vision, you’ve begun to answer the question **“Where do we want to go?”** in relation to systemic SEL implementation, and you are ready to move on to the next stage in SEL action planning: Defining long-term goals.

TOOL 2: Develop Long-Term Goals for Districtwide SEL

Estimated time for completion	4-6 hours
Materials needed	Your district’s shared vision (either an overarching vision or an SEL-specific vision). Because district vision-setting may take several months, you might consider moving ahead to set goals based on a strong draft of the vision if it is still undergoing stakeholder review, revision, and final district approval.

This tool helps district SEL planning committees develop long-term goals for districtwide SEL implementation by further answering the question **“Where do we want to go?”**

Long-term goals outline what the SEL planning committee aims to accomplish within three to five years. They draw directly from your shared vision and define what it will look like for the district to realize its vision for SEL. CASEL strongly encourages starting with long-term goals (rather than goals for just one year) to ensure a link between your SEL vision and what you aim to accomplish.

How to use this tool

This tool provides a goal-setting template along with a process and examples. Assemble a committee that includes district staff who support SEL directly as well as cross-departmental leaders who may help carry out SEL implementation over time. It is also important to include a committee member who is focused on district data and accountability, such as a representative from the district’s research and evaluation team. This broad team will help ensure that SEL is integrated with other district and school improvement processes.

After using this tool, the committee can get input from other stakeholders to refine and finalize the goals.

This tool includes the following:





Section 1: Review Guidelines for SMARTIE Goals for SEL¹

As a committee, review the following guidelines for SEL SMARTIE goals to develop a shared understanding and expectations for what your goals will include.

SMARTIE goals are:

Specific: The goal clearly states what will be accomplished, where, and by whom.

Measurable: The goal includes a measurable outcome. The team will be able to know whether the goal has been accomplished by looking at measurable evidence.

Attainable: The goal can be reasonably achieved given the current status of the district and any prior progress toward the goal.

Relevant: The goal matters for improving the quality of students' educational experience and aligns with district priorities and improvement goals.

Time-bound: The goal includes a specific time frame for achievement and regular, shorter-term benchmarks to check in on interim progress before the final goal deadline.

Inclusive: The goal invites members of traditionally excluded or marginalized groups to make decisions and contribute in a way that shares power.

Equitable: The goal includes an element of fairness or justice that seeks to address systemic injustice, inequity, or oppression.

SEL Planning Committee Reflection and Check-In:

Take a moment to reflect on the SMARTIE guidelines. We suggest individually reflecting on these questions and then discussing them as a committee to ensure there's a shared understanding of the SMARTIE guidelines.

A. What aspect of the SMARTIE goal-setting process seems like the most challenging to create? Which seems like the easiest? Why?

B. Who else needs to be included to ensure inclusivity and equity in our goal-planning process?

C. How comfortable are you individually with creating long-term SMARTIE goals? How comfortable is this committee with developing long-term SMARTIE goals? Select your response from these options and bring your perspective to the committee discussion:

1. Not at all comfortable 2. Slightly comfortable 3. Moderately comfortable 4. Very comfortable

¹ Based on the model from [The Management Center](https://www.managementcenter.org/) – visit [managementcenter.org](https://www.managementcenter.org/) to learn more.

Section 2: Develop Long-Term SMARTIE Goals for SEL

1. Review your [shared vision](#) The committee's long-term SEL SMARTIE goals will elaborate on the shared vision and provide specific, measurable, attainable, relevant, time-bound, inclusive, and equitable statements about what it will mean to achieve the vision.

Print the vision statement for each committee member or display it on the wall where everyone can see it. You may also want to include it in the box below for your records.

Our Shared Vision

Example: District Shared Vision

Our district will provide a world-class education that prepares all students academically, socially, and emotionally to be caring and contributing students, family members, friends, and civically engaged community members.

2. Break down the shared vision into key SEL priorities that are more manageable statements. Consider this approach as an example that supports equity of voice:

- Members of the SEL planning committee individually read your district's shared vision and think about the vision's major ideas. The facilitator may prompt the group by asking, "What big ideas do you see represented in our shared vision?"
- Ask each team member to reflect and write each distinct idea on separate sticky notes.
- Taking turns, have each team member share one of their sticky notes and post it on a surface visible to everyone such as a whiteboard. After each turn, ask the full team whether anyone named a similar idea, and add their sticky notes to make a cluster on the board.
- Repeat the process until all major ideas in the vision have been named. If you have more than three to five clusters of sticky notes, try to condense them if possible, since each cluster will be developed into a SMARTIE goal.
- After reviewing each cluster of sticky notes, write a single phrase to summarize the main idea in a way that logically connects to SEL implementation.
- By the end of this exercise, the group should have three to five key SEL priorities that will be used to develop SMARTIE goals.

Record the key SEL priorities stemming from your district’s shared vision here:

1.

2.

3.

4.

Example: Key SEL Priorities within a District Shared Vision

1. Provide a world-class education that prepares all students academically, socially, and emotionally.
2. Prepare all students to be caring and contributing students, family members, and friends.
3. Prepare all students to be civically engaged community members.

3. Use the template to develop an SEL SMARTIE goal statement for each SEL priority.

- As a committee, discuss how you would describe each priority to a typical community member in your district. This will help to transition from aspirational language to more practical, concrete language.
- Write this in the top row of the SMARTIE goal template on the following page.
- Now the committee will turn attention toward the rest of the template. Discuss and develop an answer for each question on the left and write your collective answer to the question in the righthand column. Prompts are included to help stimulate your thinking, and an example follows.

Implementation vs. Outcome Goals

In order to actualize your long-term vision, you’ll need to identify the intended outcomes that directly benefit students and adults. To achieve these outcome goals, you may also want to set long-term implementation goals that specify what your district will do to achieve intended outcomes.

- *Outcome goals* relate to specific changes (in experience, knowledge, skills, behavior, etc.) for students and adults.
- *Implementation goals* relate to development of structures and processes that will support your district’s SEL work and that will make it possible to achieve the outcomes for students and adults.

Examples of Implementation vs. Outcome Goals	
Implementation Goal	Outcome Goal
All high schools will implement evidence-based SEL programs.	95% of high school students will achieve their personal growth goals on district social and emotional competency assessments.
All teachers will attend professional learning on SEL and academic integration, community-building, and culturally sustaining classroom practices.	90% of students and staff, including 90% within each racial and socioeconomic subgroup, will report strong ratings of school and classroom climate.
All schools will use restorative approaches to discipline and regularly review discipline data for racial disproportionality.	95% of all office referrals will be resolved with restorative practices rather than detentions or suspensions. No racial disproportionality will exist in office referral and suspensions data districtwide and in any school.



SEL SMARTIE Goal Template

SEL Priority and Description:

<p>In order to achieve this priority as described, what change is going to occur in the next three to five years? (specific)</p>	<p>Write your committee’s collective answer to “what change is going to occur?” Specifically, address the following questions:</p> <ul style="list-style-type: none"> • What would this look like in action? • What is a compelling, actionable description that will help bring together district stakeholders? • Consider first what outcomes for students and adults will demonstrate this priority, and whether any changes in implementation must occur to achieve these outcomes.
<p>Who are the stakeholders who will be primarily involved with and affected by this change? (specific, relevant)</p>	
<p>How will this change be measured? When will measurement take place? (specific, measurable)</p>	<p>Consider existing data sources and any new data sources you may need. Common sources include student administrative data (e.g., attendance, behavior, grades); surveys administered to staff, students, or families on school/ classroom climate; student social and emotional competence data.</p>
<p>How will the process or outcomes address inclusion? (inclusive)</p>	<p>Encourage the committee to think critically about traditionally excluded or marginalized groups in the district. The committee should make sure they are not excluded here and will benefit from this goal.</p>
<p>How will the process or outcomes address equity? (equitable)</p>	<p>To answer the question on the left, consider how to eliminate or decrease disparities in outcomes between subgroups.</p>
<p>By how much will this change occur in the next three to five years? (specific, measurable, attainable)</p>	<p>Identify any baseline district data related to the type of measurement you need to monitor progress for this goal. Examine past rates of change to set a feasible yet ambitious target. If there is no baseline data, look for data from other districts that have implemented similar SEL work.</p>

Goal statement that incorporates all SMARTIE criteria:

Example: Completed Long-Term SEL SMARTIE Goal Template

Vision Statement Priority and Description: Provide a world-class education that prepares all students academically, socially, and emotionally.

In our district, “provide a world-class education that prepares all students academically, socially, and emotionally” means that all students, across grade levels, genders, racial and ethnic groups, abilities, and other demographic categories, are supported in their academic, social, and emotional development. This means providing students with educational experiences that promote skill development in identifying, appreciating, and responding to their emotions, and interacting with other students, staff, their families, and other community members in ways that foster positive relationships. These skills and relationships will strengthen the focus, persistence, and peer and adult support needed to engage with rigorous academic instruction.

In order to achieve this priority as described, what change is going to occur in the next three to five years? (specific)	Students will experience social and emotional growth. We will implement an evidence-based SEL program, as well as instructional practices that will integrate SEL with academics throughout the day to promote student social and emotional knowledge and skills development.
Who are the stakeholders who will be primarily involved with and affected by this change? (specific, relevant)	Students in all schools, at all grade levels.
How will this change be measured? When will measurement take place? (specific, measurable)	Our district research and evaluation committee has selected a measure that assesses student social and emotional competence. This measure will be administered at the beginning and end of each school year. Interviews with students and staff (end of year).
How will the process or outcomes address inclusion? (inclusive)	SEL will be implemented as a Tier I support at all grade levels.
How will the process or outcomes address equity? (equitable)	All students will get the support they need to grow in their SEL competence. Disaggregated student data will be reviewed quarterly to ensure that all students are getting the type and level of support required to meet their needs for growth.
By how much will this change occur in the next three to five years? (specific, measurable, attainable)	90% of students will meet growth goals on a measure of student SEL competence (at the end of five years). To start, each year we will see some growth for all students, but the magnitude of the growth is expected to vary.

Goal statement that incorporates all SMARTIE criteria:

In schools across the district, classroom teachers and other staff will implement evidence-based SEL programs and practices that will support all students’ capacity to acknowledge and respond to their emotions and build positive social relationships in and out of school. We’ll measure progress toward this goal each year by using an assessment that measures students’ social and emotional competencies, as well as interviews with students and staff. Five years from now, 90% of students will achieve the growth goals on the assessment that measures competencies such as self-awareness, social awareness, and relationship skills.



4. Once each goal statement is developed, share the statement and get feedback from district- and school-level stakeholders, including cross-department directors in the district.

Once feedback is received, the SEL planning committee should revise the goal statements. You can find additional examples of SMARTIE goals that have been developed and used by districts implementing systemic SEL [here](#).

Now that your SEL planning committee has developed long-term SEL SMARTIE goals, you've answered the question **"Where do we want to go?"** in relation to systemic SEL implementation. Your SMARTIE goal statements are concrete, measurable statements about what the district will accomplish in three to five years with its SEL implementation work. These goals are a fundamental building block when the district is in the "Organize" stage.

Next Steps

- Compare these long-term goals for SEL with the prominent overall goals of the district. It is critical that SEL goals align with the overall direction and message from district leadership. The clarity of this connection will likely impact the district's level of investment in SEL, the reception from the larger district community, and the sustainability of implementation.
- Take stock of where your district is now and where it has been in the past by completing or reviewing the [Districtwide SEL Implementation Rubric](#) and an [SEL Program and Initiative Inventory](#), in preparation for developing annual goals and an action plan for the coming year.

TOOL 3: Districtwide SEL Program and Initiative Inventory

<p>Estimated time for completion</p>	<p>45-60 minutes per interview or focus group in section 1, plus 3-6 hours for organizing notes, synthesizing, and developing next steps in sections 2 and 3. If sending a survey electronically, plan for 3 hours to set up the survey online, prepare and send communications, and follow up with recipients.</p>
<p>Materials needed</p>	<p>Long-term SMARTIE goals for SEL, data that indicates which schools or departments are already using SEL programs and practices</p>

How to use this tool

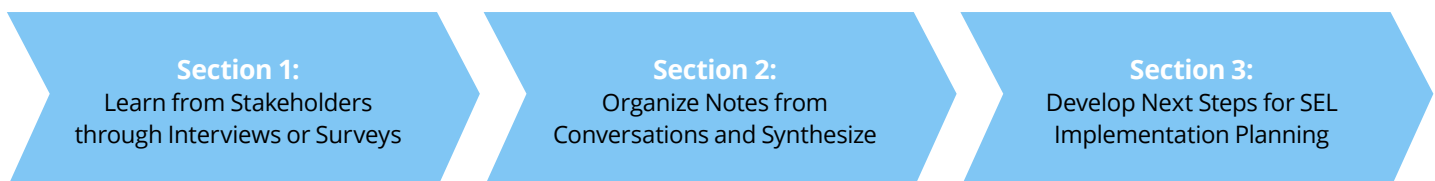
This tool is designed to help district social and emotional learning (SEL) teams learn about past and current SEL-related work being implemented across the district and is intended to be used along with the [CASEL Districtwide SEL Implementation Rubric](#) to establish the baseline of SEL implementation before creating or revising an action plan. Together these tools help districts answer the question **“Where are we now?”** in relation to systemic SEL implementation. CASEL recommends that districts complete this inventory at least every two years, and the Implementation Rubric twice each year.

SEL-related work may include formal programs or other activities, initiatives, or efforts focused on SEL, or related areas such as youth development, mental health, physical education, bullying prevention, or a host of other areas.

Even if the term “social and emotional learning” has not been used explicitly in your district, it is important to acknowledge and understand the SEL-related work that has already been done by schools, district teams, and partners. Rather than presenting SEL as a new initiative, the district SEL team should view and communicate this effort as building on work that is already taking place to support young people’s development.

This tool is the first part of the needs and resources assessment that districts should engage in after developing [long-term goals for SEL](#), and before developing an [SEL implementation roadmap](#). It includes an interview protocol to help districts answer the question **“Where have we been?”** in relation to systemic SEL implementation.

This tool will walk your team through the following steps:



Section 1: Learn from Stakeholders

Talk to district- and school-level staff, families, and other community stakeholders to understand what SEL-related programs, initiatives, and other efforts have been tried across the district, at individual schools, and in communities and homes.

Selecting People to Speak With

When deciding who to speak with, you may wish to consider contextual factors such as the size of your district, the district's plan for SEL implementation, and staff capacity. For example, if your team is working in a small district, it may be possible to speak with someone in each school to learn about SEL they may be implementing.

If your district is larger and your SEL team is small, you may have to speak with people in a strategic sample of schools. For example, if there are schools in the district that have demonstrated improvements in key areas related to your district's long-term goals for SEL, then you may decide to speak with stakeholders from those schools. If you are planning to implement SEL using a cohort model (i.e. starting with a group of schools, and gradually expanding implementation to other schools), your work on this inventory can focus more on schools that will be in the first cohort.

As you select specific people to speak with, consider who can share details about current or past efforts that have been tried in the district that connect to SEL or related areas such as youth development, mental health, physical education, bullying prevention, or related areas.

People you might wish to speak with include:

- Current and former SEL department staff
- District leaders of departments that may overlap with SEL, such as curriculum and instruction, equity, counseling, and postsecondary preparation
- Family and community engagement department staff
- Parent/family council members
- School administrators, counselors, or others in school-level positions focused on climate and culture
- Students
- Anyone else who might have in-depth knowledge of SEL-related programs implemented across the district, at individual schools, and in communities and homes

Preparing to interview / survey stakeholders

- First, gather any previous program and initiative inventories that have been completed, so you can build on that prior work and learning.
- Allot 45 minutes to one hour for each interview.
- Plan to take detailed notes or record each conversation.
- If it makes more sense for your team, you may decide to do group interviews or replicate this interview protocol in an online survey. This approach could allow you to learn from more schools and requires less time and energy than conducting individual interviews.



Program/Initiative Inventory Interview Protocol

Thank you for agreeing to speak with me today. I am [interviewer name and role], and today I want to hear from you about strategies and programs for social emotional learning (SEL) that have been tried for students in [District Name]. What you share will help our [District Name] SEL team to better develop a plan for districtwide SEL implementation for all students.

1. In what ways does your school/organization/department support students in developing social and emotional skills?

If the person asks what you mean by “social and emotional skills,” you can share that by SEL, we mean “the process through which children and adults understand and manage emotions, set and achieve positive goals, feel and show empathy for others, establish and maintain positive relationships, and make responsible decisions.”

2. What SEL-related programs and initiatives:

- For a district-level staff person: **has your department tried?**
- For a school-level staff person: **has your school tried?**
- For a community member: **have you/your organization tried/been a part of?**

For each program/initiative mentioned, ask the following questions:

3. When did implementation begin?

4. Is the program/initiative still being implemented? If no, why not?

5. What are/were the goals of the program/initiative?

6. How well did/does the program/initiative achieve those goals?

7. What evidence have you seen that shows whether this program/initiative has worked? Some examples of evidence include information shared on student, family, and staff surveys; school records; and program/initiative reports.

Only ask this question if you don't already have access to the data and/or reports:

8. Do you know if any of the reports related to that work are public? It would be great to learn more.

If not public, would you or someone else in your department/school/organization be able to share with me?

9. What do you know about the types of resources that are required to run this program/initiative to achieve these goals?

Some examples of resources include funding, time, and people/staff.

10. What were some challenges faced by people implementing this program/initiative?

11. What else should the [District Name] SEL team know about this program/initiative as we work on a plan for implementing SEL districtwide?

Thank you for your time and for everything you've shared. I have learned a lot. What you have shared will help our SEL team to develop a plan for implementing SEL districtwide for all [District Name] students.



Example: SEL-Related Programs and Initiatives Tried in [District Name]

Program/Initiative Name	Positive School Climate	PBIS	Bullying Prevention
District Dept/School/Org that tried it	District Culture and Climate	Jefferson ES, Phillips ES, Evergreen ES, Jackson MS, Hargrove MS, probably more	District Health and Wellness
Grades	1-4 district-wide	K-8	6-8
Currently Active?	Yes, districtwide	Yes, at 3 of 5 schools	~30% implement-ing after 4 years
If No, Why?	N/A	Phillips ES and Hargrove MS discontinued due to challenges with consistency, student buy-in, adult buy-in	Some campuses saw increases in bullying incidents, so changed course Grant ended; staff hired to support campuses was temporary
Goals of Program/ Initiative?	Establish schoolwide adult practices to support safe and supportive culture and climate for staff and students	Teach, promote, and reinforce positive behavior Reduce problem behavior and punitive discipline	Improve school climate, build classroom community, reduce incidents of bullying
Achieve Intended Goals?	At about 70% of schools	Working well at 3 of 5 schools	No
Evidence of Achieving Goals? Are Goals Achieved for All Sub-Groups?	Climate survey	Reductions in office referrals, improved student perceptions of school climate	Incidents have stayed level or increased, no significant results with school climate surveys
Necessary Resources	District climate specialist supporting no more than 8 schools At least 2 monthly coaching visits to each school	Parents are supporting through incentives/school store; yearly all-staff training; PBIS team meets bimonthly	District coaches to support schools in lesson delivery Training for staff to lead community-building circles
Challenges	Lacked budget District team capacity Lack of opportunities for full-day PL	Difficulty convening team regularly Low staff morale led to low implementation Need for ongoing support for staff	Staff needed more training to lead lessons and circles effectively and consistently Loss of funding
What's the Connection to the District's Long-term SEL SMARTIE Goals?	Relates to our goal for improving school climate in all schools in 5 years.	Yes, relates to structures and systems we put in place to support positive student behavior.	Yes, relates to building positive student to student relationships.

Section 2: Organize Notes from Conversations and Synthesize

After completing interviews, you should have a set of notes from each conversation. Using your notes, create a table using the example below as a model. Complete one row for each program/initiative, combining notes from multiple interviews as necessary. [You can download a blank table here.](#)

After filling in the table, identify any gaps that remain in the table and determine who else you may need to speak with to complete it.

Section 3: Develop Next Steps for SEL Implementation Planning

Review your completed table to determine which efforts the district should build on to support its SEL-related vision and goals. Here are some questions to discuss as a team to determine whether district support for items in the table should be expanded, maintained, or phased out:

- Is the effort still being implemented?
- Is the effort achieving SEL-related goals?
- Is the effort achieving its intended goals?
- Is there strong evidence to document the impact of the effort?
- What resources (e.g. funding, personnel, time) are available to continue or reinstate the effort?
- What challenges come along with the effort?
- To what extent could the SEL team reduce the effect of (or eliminate) these challenges?

After determining which SEL-related efforts the SEL team wishes to build on and/or re-instate, complete a second table, including only those efforts slated for continuation/reinstatement. For any programs that the district does not plan to continue, it is important to communicate clearly with those who are implementing it about how district support will be phased out and why. If it is appropriate to allow schools to continue implementing a program on their own, help school leaders make connections with organizations that can continue to support implementation.

Example: SEL-Related Programs [District Name] SEL Team Will Build on/Reinstate

Program/Initiative Name	Connections to District SEL Goals	How SEL Team Wishes to Incorporate into Planning for Future	Next Steps	SEL Team Member Responsible for Next Step	Deadline for Next Step
Positive School Climate	Focuses on building positive relationships (student to student, student to staff, and staff to staff)	The SEL team can rely on this team's work to support social awareness and relationship skills. We can partner with the Climate and Culture team to support school teams via PL and coaching related to these areas.	SEL team lead will schedule a meeting with Climate and Culture team lead to present the SEL team's idea, and to begin to develop a plan for working together.	Jo M.	5/19/2020

Use regular SEL Team meetings to check in on progress for carrying out next steps identified in this table.

Now that your SEL team has conducted an inventory of SEL-related programs and initiatives in your district, you've answered the question **"Where have we been?"** in relation to systemic SEL implementation.

Including perspectives from a broad range of stakeholders ensures that the team has a strong sense of SEL-related work that has been implemented across the district, at individual schools, and in communities and homes. This learning will inform the development of an implementation roadmap, annual goals for SEL, and a one-year action plan.

Next Steps

- If you haven't recently done so, complete the [CASEL Districtwide SEL Implementation Rubric](#). Together, the rubric and this inventory help to understand past and current progress toward implementing systemic SEL in your district.
- Develop a long-term [SEL implementation roadmap](#) by building on the recommendations you developed in section 3 of this tool.



TOOL 4: SEL Implementation Rubric

Estimated time for completion	2-4 hours
Materials needed	Completed SEL Program and Initiative Inventory along with any other documentation about the current use of SEL throughout the district office and schools.

This rubric (p.24) helps districts answer the question **“Where are we now?”** in relation to systemic SEL implementation. CASEL recommends that districts complete this rubric at the beginning and end of each school year to mark progress and update their action plan for the coming year.



FOCUS AREA 1 RUBRIC

Build Foundational Support and Plan

<p>Read the definition of full implementation under each item before selecting a rating. A '4' rating indicates that the full definition is met.</p>	<p style="text-align: center;">1</p> <p style="text-align: center;">Not yet started planning or implementation</p>	<p style="text-align: center;">2</p> <p style="text-align: center;">Partially planned and implemented</p>	<p style="text-align: center;">3</p> <p style="text-align: center;">Mostly planned and implemented</p>	<p style="text-align: center;">4</p> <p style="text-align: center;">Fully planned and implemented; promoting sustainability</p>
<p>1-A: Develop a shared vision and aligned goals for SEL</p> <hr/> <p>A districtwide vision establishes SEL as essential to the district's educational mission, aligns SEL to core district values and articulates shared language around SEL. The vision is informed by and shared with all key stakeholders (students, district and school staff, parents, and community partners) and revisited/updated every two years. The district develops SEL goals aligned to the vision, including short- and long-term outcomes around equitable learning environments and students' social, emotional, and academic progress.</p>	<ul style="list-style-type: none"> Not yet started 	<ul style="list-style-type: none"> Developing vision Soliciting input from stakeholders 	<ul style="list-style-type: none"> Developed vision Planning to share vision with stakeholders Developing aligned SEL goals 	<ul style="list-style-type: none"> Developed vision Shared vision with stakeholders and planning to review every two years Developed aligned SEL goals
<p>1-B: Assess SEL needs and resources</p> <hr/> <p>The district has leveraged diverse stakeholders to review existing SEL programs and practices in schools and through community partnerships, as well as needs still to be addressed. The district shares findings broadly and reassesses SEL needs and resources at least every two years.</p>	<ul style="list-style-type: none"> Not yet started 	<ul style="list-style-type: none"> Started needs and resources assessment 	<ul style="list-style-type: none"> Completed needs and resources assessment Planning to share findings with stakeholders 	<ul style="list-style-type: none"> Completed needs and resources assessment Shared findings with stakeholders Has plan to reassess at least every two years
<p>1-C: Develop and execute a district plan for systemic SEL implementation</p> <hr/> <p>The district leverages available data (e.g. on SEL implementation quality, climate, social and emotional competence, discipline, etc.) and feedback from staff, families, students, and community partners to develop a district-level action plan for achieving and evaluating short- and long-term SEL goals. This plan includes a phased roll-out strategy that scales up implementation across all grades and schools, and includes strategies for promoting SEL for both students and adults in partnership with families and community partners [See CASEL Guide to Schoolwide SEL]. The plan is shared with all stakeholders and articulates clear roles and responsibilities for both district-level and school staff.</p>	<ul style="list-style-type: none"> Not yet started 	<ul style="list-style-type: none"> Developing plan Gathering input/ feedback from students, families, and community partners 	<ul style="list-style-type: none"> Developing plan Integrated data and feedback from students, families, and community partners 	<ul style="list-style-type: none"> Developing plan Integrated data and feedback from students, families, and community partners Implementing plan with all schools districtwide

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FOCUS AREA 1 RUBRIC

Build Foundational Support and Plan

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<p>1-D: Establish a foundation for continuous improvement</p> <p>A clearly articulated plan for collecting and reflecting on SEL continuous improvement is developed in collaboration with district research and evaluation staff and/or an evaluation partner (if district capacity is limited). The district has specified roles, sources and timelines for collecting and discussing formative data for monitoring progress toward SEL goals, and summative data for measuring achievement of SEL goals at the district and school levels. The district commits to disaggregating these data to examine impact across subgroups. The process also establishes roles, responsibilities, timelines, and discussion norms for collecting and reflecting on these data. The district identifies supports and tools to provide to school teams for establishing their own processes to improve SEL practice.</p>	<ul style="list-style-type: none"> Not yet started 	<ul style="list-style-type: none"> Planning SEL continuous improvement process Identifying formative and summative data sources 	<ul style="list-style-type: none"> Developed formal SEL continuous improvement process that includes a schedule and roles for collecting and reflecting on data Identified formative and summative data sources Developing supports and tools for school teams 	<ul style="list-style-type: none"> Developed formal SEL continuous improvement process that includes a schedule and roles for collecting and reflecting on data Identified formative and summative data sources Developed supports and tools for school teams
<p>1-E: Organize the district to promote collaboration among school and district leaders around SEL, academics, and equity</p> <p>The SEL team/lead has influence at the cabinet level and is housed in a department that focuses on all students, such as Teaching and Learning, College and Career Readiness, and/or Equity. District structures promote cross-department collaboration, and the SEL team partners with key departments to develop common goals and aligned strategies for supporting schools and students. SEL is embedded into frameworks for equity, academics, and school improvement.</p>	<ul style="list-style-type: none"> Not yet started 	<ul style="list-style-type: none"> The SEL team shares ideas and practices with other central office departments 	<ul style="list-style-type: none"> The SEL team has established partnerships with key departments SEL introduced in cabinet meetings SEL housed in a department focused on all students 	<ul style="list-style-type: none"> Cross-department collaboration structures established SEL embedded in equity, academic, and school improvement frameworks SEL incorporated into cabinet meetings SEL housed in a department focused on all students
<p>1-F: Communicate about SEL as a district priority</p> <p>Districtwide communication highlights the importance of SEL for all students and regularly shares with all stakeholders how SEL efforts support district priorities and goals. A strong communication plan includes consistent SEL messaging tailored for key internal and external stakeholder groups in appropriate languages and formats. The plan also ensures clear communication about roll-out timelines and expectations for roles and responsibilities. The superintendent and other district leaders regularly communicate about the importance of SEL both formally and informally.</p>	<ul style="list-style-type: none"> Not yet started 	<ul style="list-style-type: none"> Developing plan Providing initial communication about SEL timelines and roles 	<ul style="list-style-type: none"> Developed plan Providing communication about SEL timelines and roles 	<ul style="list-style-type: none"> Implementing plan Regularly sharing how SEL efforts support district priorities and goals Providing communication about SEL timelines and roles The superintendent and district leaders communicate importance of SEL

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FOCUS AREA 1 RUBRIC

Build Foundational Support and Plan

<p>Read the definition of full implementation under each item before selecting a rating. A '4' rating indicates that the full definition is met.</p>	<p style="text-align: center;">1</p> <p style="text-align: center;">Not yet started planning or implementation</p>	<p style="text-align: center;">2</p> <p style="text-align: center;">Partially planned and implemented</p>	<p style="text-align: center;">3</p> <p style="text-align: center;">Mostly planned and implemented</p>	<p style="text-align: center;">4</p> <p style="text-align: center;">Fully planned and implemented; promoting sustainability</p>
<p>1-G: Align financial resources to support SEL</p> <hr/> <p>A strong long-term budget and plan for equitable SEL funding meets the needs of all schools. Funding comes from diversified sources as part of a budget to roll out, adequately staff, support, and sustain ongoing SEL implementation for all students.</p>	<ul style="list-style-type: none"> • Not yet started 	<ul style="list-style-type: none"> • Identifying funding sources • Developing plan 	<ul style="list-style-type: none"> • Short-term funding secured • Planning long-term sustainability 	<ul style="list-style-type: none"> • Long-term funding secured to sustain ongoing SEL implementation • Funding secured from diversified sources
<p>1-H: Implement human resource practices and policies that support SEL</p> <hr/> <p>District human resources practices embed SEL considerations into candidate screening, hiring, evaluation, and employment policies at the district and school levels. District and school job descriptions highlight the importance of modeling SEL competencies and include SEL as an expected competency for candidates. Attention is paid to diversity in candidates and hires.</p>	<ul style="list-style-type: none"> • Not yet started 	<ul style="list-style-type: none"> • Starting to establish practices and policies 	<ul style="list-style-type: none"> • Established practices and policies at district level • Social and emotional competence is expectation for SEL-related positions 	<ul style="list-style-type: none"> • Established practices and policies at district and school levels • Social and emotional competence is expectation for all job candidates

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FOCUS AREA 2 RUBRIC

Strengthen Adult SEL Competencies and Capacity

Read the definition of full implementation under each item before selecting a rating. A '4' rating indicates that the full definition is met.

	1 Not yet started planning or implementation	2 Partially planned and implemented	3 Mostly planned and implemented	4 Fully planned and implemented; promoting sustainability
<p>2-A: Strengthen central office SEL expertise</p> <p>The district provides professional learning about SEL research and practice to central office leaders and staff from all departments, including foundational professional learning for all new staff. These events enable central office staff to understand their role in integrating SEL into their area of work and to speak clearly about the value of SEL. Expertise is further strengthened by convening SEL learning communities among central office staff.</p>	<ul style="list-style-type: none"> Not yet started 	<ul style="list-style-type: none"> Starting to provide information and professional learning Planning to incorporate foundational learning for new staff 	<ul style="list-style-type: none"> Professional learning provided for some central office staff Foundational learning provided to new staff Planning to convene central office staff as SEL professional learning community 	<ul style="list-style-type: none"> Professional learning provided for central office leaders and staff from all departments, including Board and Cabinet Foundational learning provided to new staff Central office staff convened as SEL professional learning community
<p>2-B: Design and implement an effective SEL professional learning program for school staff</p> <p>A scaffolded and comprehensive district SEL professional learning program supports school staff in developing skills aligned with district goals. Ongoing sessions are included in the district's professional learning calendar. Dedicated district staff members plan, facilitate, and coordinate the sessions, and facilitators represent the diverse backgrounds in the district. SEL practices and content are embedded throughout other professional learning programs in the district (e.g., core content). School leaders and teams have regular opportunities to learn from each other and share best practices around SEL implementation. Data on the quality of SEL sessions are regularly collected and used for continuous improvement.</p>	<ul style="list-style-type: none"> Not yet started 	<ul style="list-style-type: none"> Some staffing for SEL professional learning Offering some professional learning 	<ul style="list-style-type: none"> Adequate staffing for SEL professional learning Providing a comprehensive menu of professional learning Schools have a few opportunities to learn from each other Collecting data on quality 	<ul style="list-style-type: none"> Adequate staffing for SEL professional learning Providing ongoing, scaffolded, and comprehensive professional learning SEL embedded throughout other professional learning programs Schools have regular opportunities to learn from each other Data on quality collected and used for continuous improvement

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FOCUS AREA 2 RUBRIC

Strengthen Adult SEL Competencies and Capacity

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	1 Not yet started planning or implementation	2 Partially planned and implemented	3 Mostly planned and implemented	4 Fully planned and implemented; promoting sustainability
<p>2-C: Strengthen staff social, emotional, and cultural competence</p> <p>The district supports staff in reflecting on their own social and emotional competencies, identities, and biases; and engaging in practices that affirm, explore and cultivate students' cultures, values, and identities. There are frequent opportunities for adults to practice, model, and enhance these competencies, including consistent and scaffolded professional learning experiences. Practices that support these competencies are also embedded into district- and school-level staff meetings. These competencies are woven through all resources and tools that guide staff in interactions with students, families, and community members.</p>	<ul style="list-style-type: none"> Not yet started 	<ul style="list-style-type: none"> Starting to provide information and professional learning Planning to incorporate foundational learning for new staff 	<ul style="list-style-type: none"> Professional learning provided for some central office staff Foundational learning provided to new staff Planning to convene central office staff as SEL professional learning community 	<ul style="list-style-type: none"> Professional learning provided for central office leaders and staff from all departments, including Board and Cabinet Foundational learning provided to new staff Central office staff convened as SEL professional learning community
<p>2-D: Develop structures that promote trust, community, and collective efficacy among staff</p> <p>The district provides frequent opportunities for staff to build supportive professional relationships and a sense of shared purpose, decision-making and efficacy. Staff norms or shared agreements guide respectful interactions, effective collaboration, and an inclusive district culture. District and school staff have dedicated time to engage in collaborative reflection and problem solving, sharing ideas and responsibility, and community building. Data on staff perceptions of their work climate are regularly collected and used for continuous improvement.</p>	<ul style="list-style-type: none"> Not yet started 	<ul style="list-style-type: none"> Some staffing for SEL professional learning Offering some professional learning 	<ul style="list-style-type: none"> Adequate staffing for SEL professional learning Providing a comprehensive menu of professional learning Schools have a few opportunities to learn from each other Collecting data on quality 	<ul style="list-style-type: none"> Established staff norms or shared agreements Regular, dedicated time and space provided for district and school staff to build community, collaboratively reflect and problem solve, and share ideas and responsibility Staff perceptions of work climate reviewed to ensure inclusive district culture
<p>2-E: Track progress on adult-focused SEL goals and continuously improve practice</p> <p>The district engages in rapid learning cycles to monitor progress and reflect on disaggregated data to inform real-time changes to implementation of adult-focused SEL strategies. These cycles follow established continuous improvement timelines. The district ensures support and tools are provided to school teams for engaging in their own rapid learning cycles around adult-focused SEL goals.</p>	<ul style="list-style-type: none"> Not yet started 	<ul style="list-style-type: none"> Adult-focused SEL goals developed Starting to collect formative data related to goals 	<ul style="list-style-type: none"> Adult-focused SEL goals developed Data collected and disaggregated according to timelines At least each semester, using data reflection to make real-time improvements to adult SEL implementation 	<ul style="list-style-type: none"> Adult-focused SEL goals developed Data collected and disaggregated according to timelines At least quarterly, using data reflection to make real-time improvements Providing support and tools for school teams

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FOCUS AREA 3 RUBRIC

Promote SEL for Students

<p>Read the definition of full implementation under each item before selecting a rating. A '4' rating indicates that the full definition is met.</p>	<p style="text-align: center;">1</p> <p style="text-align: center;">Not yet started planning or implementation</p>	<p style="text-align: center;">2</p> <p style="text-align: center;">Partially planned and implemented</p>	<p style="text-align: center;">3</p> <p style="text-align: center;">Mostly planned and implemented</p>	<p style="text-align: center;">4</p> <p style="text-align: center;">Fully planned and implemented; promoting sustainability</p>
<p>3-A: Adopt and implement PreK-12 SEL standards or guidelines</p> <p>Strong SEL standards or guidelines are comprehensive, developmentally appropriate, and culturally responsive, and include benchmarks for what all students should know and be able to do from PreK-grade 12. These SEL standards are aligned and integrated with the district's academic standards and informed by staff, families, and community partners. Ongoing communication and professional learning build district and staff capacity for integrating SEL standards with instruction.</p>	<ul style="list-style-type: none"> Not yet started 	<ul style="list-style-type: none"> Beginning to draft standards 	<ul style="list-style-type: none"> Drafted standards, received feedback Aligning SEL standards or guidelines to academic standards Developing communication and professional learning strategies 	<ul style="list-style-type: none"> Adopted SEL standards SEL and academic standards aligned and integrated Shared standards publicly and providing ongoing professional learning
<p>3-B: Adopt and implement evidence-based programs and practices</p> <p>The district has adopted evidence-based SEL programs and practices that are implemented in all schools and grade levels [See CASEL Program Guide evidence-based programs]. These programs and practices explicitly address students' SEL competencies and align with the priorities valued by stakeholders and with adopted standards or guidelines. The district provides professional learning to all staff who will implement and support the programs and practices. The district supports schools in engaging families and community partners around programs and practices, and in collecting and using data to monitor implementation and outcomes.</p>	<ul style="list-style-type: none"> Not yet started 	<ul style="list-style-type: none"> Reviewing programs and practices 	<ul style="list-style-type: none"> Adopted program(s) and implementing in some schools and/or grade levels Providing professional learning Developing strategies for engaging families and community partners Developing strategies for monitoring implementation and outcomes 	<ul style="list-style-type: none"> Implementing in all schools and grade levels Providing professional learning Supporting schools in engaging families and community partners Supporting schools in monitoring implementation and outcomes
<p>3-C: Integrate SEL with academics</p> <p>The SEL team/lead collaborates with academic departments to integrate and prioritize SEL in academic and instructional frameworks, school leadership and improvement strategies, and the academic departments' professional learning content. The district is implementing a coordinated and scaffolded professional learning plan to build teachers' capacity to foster students' social and emotional knowledge, skills, and attitudes through academic instruction and curriculum content, including support for culturally relevant instructional practices.</p>	<ul style="list-style-type: none"> Not yet started 	<ul style="list-style-type: none"> Starting to collaborate with academic departments Developing professional learning plan 	<ul style="list-style-type: none"> Starting to integrate SEL into academic priorities and strategies Some professional learning provided 	<ul style="list-style-type: none"> SEL fully integrated with academic priorities and strategies Implementing coordinated and scaffolded professional learning plan

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Promote SEL for Students

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<p>3-D: Develop and strengthen family partnerships</p> <p>The district prioritizes positive staff-family relationships and two-way communication with families at the district and school levels. The district offers meaningful opportunities for families to participate and collaborate in SEL activities, so that families understand, experience, inform, and support the SEL development of students in partnership with school and district staff. The district gathers input from families about their preferences and needs. These data are used to improve family partnership strategies.</p>	<ul style="list-style-type: none"> Not yet started 	<ul style="list-style-type: none"> Gathering input from families about best strategies for engagement and partnership 	<ul style="list-style-type: none"> Input from families has been collected, synthesized, and is being used to inform a plan for family partnerships Developing a plan for family partnerships 	<ul style="list-style-type: none"> Implementing strategies for two-way communication and engaging families in SEL activities Feedback from families is regularly collected and used to inform improvement
<p>3-E: Develop and strengthen SEL-related community partnerships</p> <p>The district and their SEL-related community partners intentionally align the language and practices they use to describe and promote SEL. These partnerships ensure that SEL is a priority during the school day and during out-of-school time, and that students and families have access to a broad range of SEL-related community services.</p>	<ul style="list-style-type: none"> Not yet started 	<ul style="list-style-type: none"> Collecting and reviewing information about SEL practices used by community partners Identifying additional community groups and service providers with whom the district may want to partner 	<ul style="list-style-type: none"> Starting to align language and SEL practices Starting to collaborate with out-of-school time providers to ensure SEL is prioritized across settings Engaging community groups and community based service providers to ensure student and family access 	<ul style="list-style-type: none"> Aligned language and SEL practices SEL is prioritized during school day and out-of-school time Students and families have access to a broad range of SEL-related community services Leveraging community partners to expand professional learning opportunities and/or research support

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FOCUS AREA 3 RUBRIC

Promote SEL for Students

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<p>3-F: Align discipline policies and practices with SEL</p> <p>The district's discipline policies and practices emphasize proactive, restorative, and developmentally appropriate approaches that support school climate and address root causes of student behavior. The district supports school staff in implementing the policies and using discipline strategies that promote SEL and relationship-building. To promote an equitable approach to discipline, the district uses disaggregated discipline data to understand the effectiveness of discipline practices, review trends for different student groups, and to intervene on systemic root causes when student groups are disproportionately represented.</p>	<ul style="list-style-type: none"> Not yet started 	<ul style="list-style-type: none"> Reviewing policies and practices Building district teams' data capacity 	<ul style="list-style-type: none"> Policies and practices are aligned with SEL Developing approach for supporting school District teams reviews disaggregated discipline data, and building school teams' data capacity 	<ul style="list-style-type: none"> Policies and practices are aligned with SEL Implementing approach for supporting school staff Systems and structures are in place that allow district and school teams to review disaggregated discipline data regularly and use to address systemic root causes
<p>3-G: Integrate SEL with a continuum of student supports</p> <p>When SEL is fully integrated with a multi-tiered system of supports (MTSS), evidence-based SEL instruction and practices enhance the continuum of academic and behavioral supports that meet the needs of all students.</p>	<ul style="list-style-type: none"> Not yet started 	<ul style="list-style-type: none"> Identified SEL instruction and practices that support academics and behavior 	<ul style="list-style-type: none"> SEL instruction and practices that support academics and behavior are integrated into some but not all tiers 	<ul style="list-style-type: none"> SEL instruction and practices that support academics and behavior are integrated into all tiers
<p>3-H: Track progress on student-focused SEL goals and continuously improve practice</p> <p>The district engages in rapid learning cycles to monitor progress and reflect on disaggregated data to inform real-time change to implementation of strategies for promoting student SEL. These cycles follow established continuous improvement timelines. The district ensures support and tools are provided to school teams for engaging in their own rapid learning cycles around student-focused SEL goals.</p>	<ul style="list-style-type: none"> Not yet started 	<ul style="list-style-type: none"> Student-focused SEL goals developed Starting to collect formative data related to goals 	<ul style="list-style-type: none"> Student-focused SEL goals developed Data collected and disaggregated according to timelines At least each semester, using data reflection to make real-time improvements 	<ul style="list-style-type: none"> Student-focused SEL goals developed Data collected and disaggregated according to timelines At least quarterly, using data reflection to make real-time improvements Providing support and tools for school teams

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FOCUS AREA 4 RUBRIC

Reflect on Data for Continuous Improvement

Read the definition of full implementation under each item before selecting a rating. A '4' rating indicates that the full definition is met.

	1 Not yet started planning or implementation	2 Partially planned and implemented	3 Mostly planned and implemented	4 Fully planned and implemented; promoting sustainability
<p>4-A: Reflect on progress toward annual SEL goals</p> <p>The district compiles summative implementation and outcome data to assess yearly progress toward districtwide SEL goals. Data are disaggregated by prioritized student groups to examine and address systemic root causes of disparities. The district engages district and school teams, students, families, staff, and community partners to reflect on these data. Data reflection is guided by established norms that promote a supportive environment for reflecting on data and a structured protocol. The district also provides ongoing support that empowers school teams to reflect on summative school-level SEL data for continuous improvement, and structured opportunities for schools to share and learn from each other (e.g., cross-site professional learning communities).</p>	<ul style="list-style-type: none"> Not yet started 	<ul style="list-style-type: none"> Summative implementation and outcome data compiled annually 	<ul style="list-style-type: none"> Summative implementation and outcome data compiled annually, disaggregated by subgroups District team(s) reflects on data using norms and protocols Data shared with students, families, staff, and community partners 	<ul style="list-style-type: none"> Summative implementation and outcome data compiled annually, disaggregated by subgroups District team(s) engage students, families, staff, and community partners in data reflection using norms and protocols Providing support to school teams and opportunities for schools to share learnings
<p>4-B: Make Improvements to the Action Plan</p> <p>At the end of each school year, the district partners with students, families, staff, and community partners to determine how to use learnings to revise SEL goals and action plan in preparation for another cycle of SEL strategic planning (beginning again with Focus Area 1). The district summarizes learnings on SEL implementation successes and challenges and shares findings in public report(s). The district supports school teams in summarizing learnings in preparation for data-informed action planning with their own students, families, staff, and community partners.</p>	<ul style="list-style-type: none"> Not yet started 	<ul style="list-style-type: none"> Developing summary of SEL implementation successes and challenges 	<ul style="list-style-type: none"> SEL implementation successes and challenges summarized annually District seeks input from staff, students, families, and community partners on next steps 	<ul style="list-style-type: none"> Summary of SEL implementation successes and challenges shared annually in public report Staff, students, families, and community partners are active members of planning/decision-making teams that revise SEL goals and action plans for the next year Providing support to school teams

For more information, visit the District Resource Center at drc.casel.org.

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TOOL 5: Develop a Long-Term SEL Implementation Roadmap

Estimated time for completion	2 hours per section, or about 4 hours total
Materials needed	Districtwide vision and long-term SEL SMARTIE goals, data to help assess progress toward goals, completed SEL program and initiative inventory and implementation rubric, districtwide strategic plan or other guiding documents

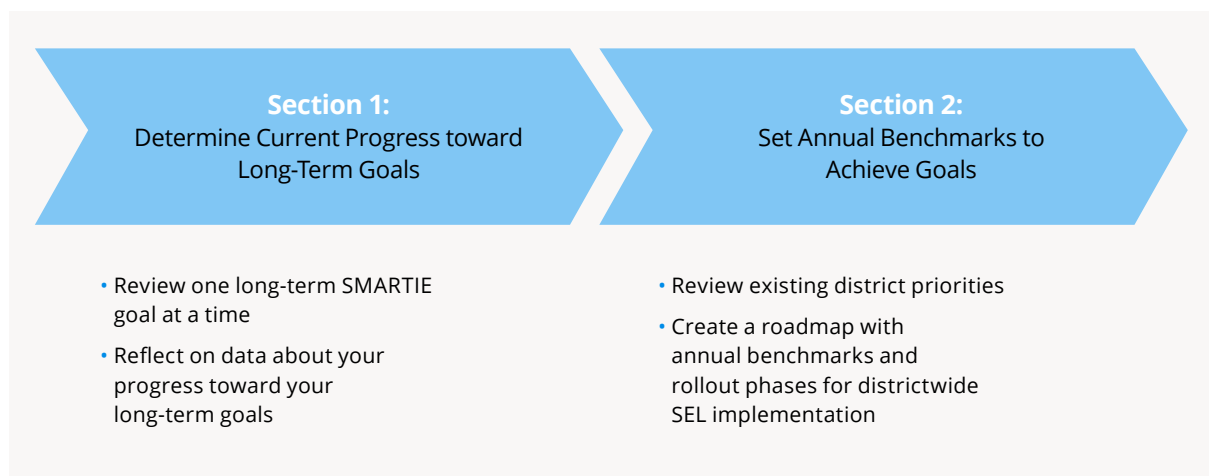
The purpose of this tool is to help district SEL teams develop a three- to five-year SEL implementation roadmap for how the district’s long-term SEL goals and shared vision will be achieved. This helps answer the question **“How do we get from where we are now to where we want to be?”** in relation to systemic SEL implementation.

How to use this tool

Assemble a team that includes district-level staff directly responsible for SEL implementation—such as a district SEL director and any district SEL specialists or coordinators. Also, be sure to include a member focused on district data and accountability, such as a representative from the district’s research and evaluation department.

After using this tool, the SEL team can get input from other stakeholders to refine and finalize the roadmap.

This tool will walk you through the following steps:



Section 1: Determine Current Progress Toward your Long-Term Goals

1. Review one of your district's long-term SEL SMARTIE goals.

Write one of your district's long-term SMARTIE goals here:

Example: District Long-Term SMARTIE Goal

In schools across the district, classroom teachers and other staff will implement evidence-based SEL programs and practices that will support all students' capacity to acknowledge and respond to their emotions and build positive social relationships in and out of school. We'll measure progress toward this goal each year by using an assessment that measures students' social and emotional competencies, as well as interviews with students and staff. Five years from now, 90% of students will achieve their growth goals on the assessment that measures competencies such as self-awareness, social awareness, and relationship skills.

2. Complete the chart like the one below to reflect on data related to your long-term goal progress. You can download a [blank chart here](#).

Example: Data Reflection on Progress Toward Long-Term Goals

Goal	Data Source	Current Status	Gap Analysis	Priorities for Action
In all 10 district schools, staff will implement evidence-based SEL programs and practices.	Program and Initiative Inventory Districtwide SEL Implementation Rubric	4 (out of 5) elementary schools implementing evidence-based SEL program; 0 (out of 3) middle and 0 (out of 2) high schools implementing	Middle and high schools are not implementing an evidence-based SEL program because they did not believe SEL programs to be relevant to their students and did not know any middle/high school programs that have an evidence-base. Interviewees also said they were concerned how to create time in the schedule for the program.	If middle and high school staff are not implementing due to a poor fit/lack of evidence base, we could prioritize researching and identifying evidence-based approaches for that age group and include teachers and other school-based stakeholders in the vetting and selection process. For middle and high schools, maybe we should consider more integrated SEL approaches instead of the structured lessons we are using at the elementary level, such as project-based learning with a strong SEL component. This may be a better fit logistically for settings where class periods are short.
At least 90% of all students will achieve their growth goals on an assessment of social and emotional competence.	Student performance on assessment of student social and emotional competence	Currently, 50% of students participating in the assessment of social and emotional competence are achieving their growth goal. Students are currently taking the assessment only in schools implementing the SEL program.	SEL assessments were administered in schools that are implementing SEL programs. Students tended to report lower growth in relationship skills and social awareness than self-awareness and self-management. Observations reveal students often have few opportunities for collaboration and relationship building during class time.	In schools that are implementing, students are getting better at identifying and managing feelings but growth in interpersonal domains is lower—maybe a stronger emphasis on SEL and academic integration would benefit schools at all levels. It could introduce teachers to strategies for building community, a collaborative culture, SEL-infused group work and projects, etc. that could address some of the gaps in competency development.



- Pull out the measurable outcomes from your long-term goal, and write them into column 1 (Goal), dividing into more than one row as necessary. In the example below, the team has identified that two measurable aspects of their goal are that all schools and staff will implement evidence-based programs and practices, and 90% of students will achieve growth goals on an SEL assessment.
- In **column 2 (Data Source)**, clarify the source of data that will be consulted to measure progress toward the goal. Use the [Data Sources to Analyze SEL Implementation and Outcomes](https://bit.ly/DRCdatasources) tool (bit.ly/DRCdatasources) to identify possible sources of data to use.
- In **column 3 (Current Status)**, reference prior and current data that helps the team make sense of the current status and rate of progress toward the long-term goal.
- Compare your goal and your current status and discuss:
 - What are the gaps between our long-term goal and where we are now?
 - Why might these gaps exist? Review the responses to your [Districtwide SEL Implementation Rubric](#) and [Program and Initiative Inventory](#) to reflect on how current implementation levels or lack of implementation may contribute to any gaps.
 - What are patterns of change in the data over the years? Why might these patterns exist?

Complete **column 4 (Gap Analysis)** with notes from your discussion. For example, the team in the example reviewed their Program and Initiative Inventory and determined that low rates of implementation were related to reception at the middle and high school level, and reviewed existing data from SEL assessments to see that the growth gaps were likely related to a lack of opportunity for students to collaborate and build relationships.

- In **column 5 (Priorities for Action)**, brainstorm action areas that are most likely to move your district closer to your goal, based on your gap analysis.
 - What will we need to prioritize in the coming years to bridge the gap between where we are now and our long-term goal?
 - Considering the gap analysis, what kind of approach is likely to be an effective lever for improvement and help us navigate the challenges we're seeing?

In the example, the team has highlighted priorities to include a wider range of stakeholders as they identify an evidence-based program to support at the middle and high school level, and to emphasize SEL and academic integration to strengthen skills in collaboration and relationship-building.

Section 2: Determine Annual Targets to Achieve your Long-Term Goal

1. Review existing district priorities. Review your district strategic plan or other guiding documents and discuss how the priorities from the chart above align with existing district priorities. Note any additional district priorities that will need to be reflected in your SEL plan.

2. Create a roadmap to plot out the steps between your current status and your long-term goal. Reflect on the gap analysis and priorities you’ve brainstormed in section 1 and in the question above to determine which courses of action will be the best levers for progress. Bullet points in your chart should reflect:

- Measurable outcomes and specific deliverables you will aim for during each year of implementation.
- Major areas of focus your SEL leaders will address during each year of implementation.
- Details related to how you will roll out SEL implementation across all schools in the district during each year of implementation. CASEL recommends a phased approach based on your district’s size and needs. For example, starting with clusters of K-12 schools, such as a high school and “feeder” middle and elementary schools; starting with specific grade levels; or starting with schools that submit an application or are already implementing some level of SEL programming.

Use this discussion to fill out the roadmap template on the following page with annual targets that connect where you are now to your long-term goal. You will find a [blank roadmap template on p. 38](#).

Current Status	Year 1	Year 2	Year 3	Long term goal
<p>50% of students participating in the assessment of social and emotional competence achieve their growth goals.</p> <p>4 elementary schools are implementing evidence-based SEL programs and assessments.</p>	<p>60% of participating students achieve their growth goals.</p> <p>Expand evidence-based SEL program and assessment to all 5 elementary schools</p> <p>Establish committee inclusive of middle grades and high school teachers and students to review and adopt SEL program, academic/SEL integration practices, and assessment for middle and high school by end of year.</p>	<p>70% of participating students achieve their growth goals.</p> <p>Roll out evidence-based SEL program and assessment in 3 middle schools (8 schools total).</p> <p>Coordinate with teacher/student teams to design program monitoring and evaluation practices and adjust districtwide implementation support strategies as needed.</p> <p>Partner with district’s Teaching & Learning and Professional Development teams to integrate SEL practices into content area professional learning for all staff.</p>	<p>80% of students achieve their growth goals.</p> <p>Roll out evidence-based SEL program and assessment in 2 high schools (10 schools total).</p> <p>Establish student-led data review/program evaluation practices/continuous improvement processes at all schools implementing an SEL program.</p> <p>Partner with district’s Talent department to integrate SEL into hiring practices, new staff onboarding, and substitute training.</p>	<p>At least 90% of all students will achieve their growth goals on an assessment of social and emotional competence.</p> <p>In all 10 district schools, staff will implement evidence-based SEL programs and SEL competence assessment</p>



Now that you have developed a long-term SEL implementation map, you’ve begun to answer the question “How do we get from where we are now to where we want to be?” in relation to systemic SEL implementation.

Next Steps

Reference this long-term SEL implementation roadmap as you develop annual SMARTIE goals and an action plan to guide your work for the coming school year.

Template: Long-Term SEL Implementation Roadmap Template					
	Current Status	Year 1	Year 2	Year 3	Long term goal
Long Term SMARTIE Goal 1					
Long Term SMARTIE Goal 2					
Long Term SMARTIE Goal 3					

TOOL 6: Develop Annual Goals and Action Plan for SEL

Estimated time for completion	Section 1: 2 hours per goal Section 2: 3-4 hours per goal
Materials needed	Districtwide SEL SMARTIE goals and completed long-term SEL implementation roadmap, district-specific guidance or templates for action-planning.

The purpose of this tool is to help district SEL teams develop goals and an action plan for a single year of districtwide SEL implementation.

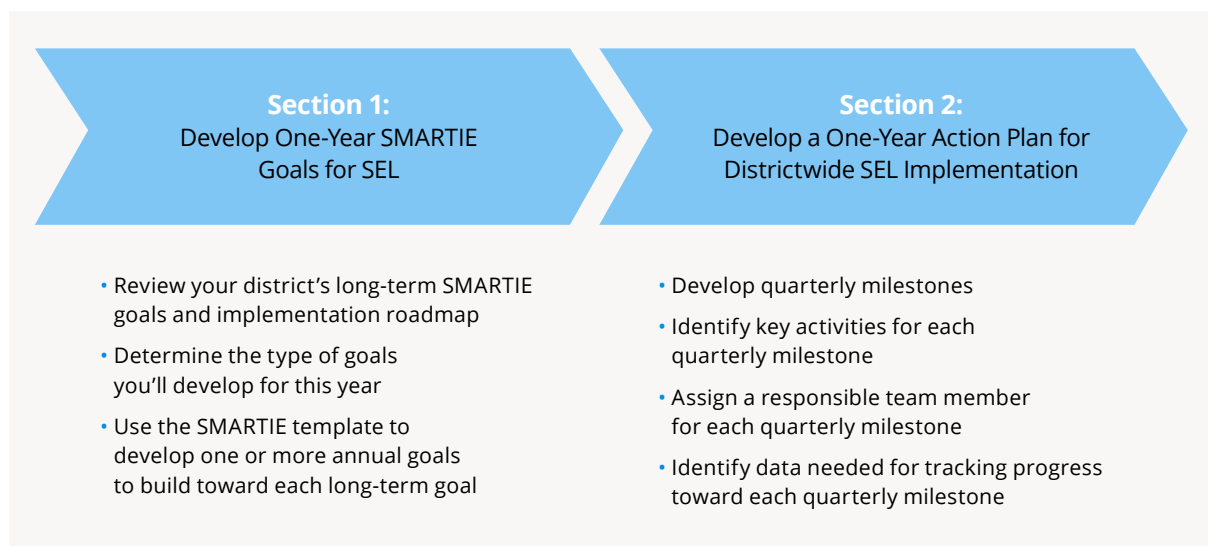
By using this tool, district teams engage in implementation planning and answer the question **“How do we get from where we are now to where we want to be?”** in relation to systemic SEL implementation.

How to use this tool

This tool provides a template for setting annual goals followed by a basic process to create a one-year action plan. CASEL recommends that you use your district’s unique action-planning process or template to develop your full project plan and track each activity. This tool will be particularly useful in ensuring annual goals, milestones, and activities are consistent with the long-term vision and roadmap for SEL and will drive toward desired outcomes.

Use this tool after defining the district’s [long-term goals](#) and long-term [SEL implementation roadmap](#). Schedule a meeting with all members of the district’s SEL team, and also be sure to include a member focused on district data and accountability, such as a representative from the district’s research and evaluation department.

This tool will walk you through the following steps:



Section 1: Develop Annual SMARTIE Goals for SEL

1. Review your district’s long-term SEL SMARTIE goals for SEL and the targets you have written for this year within your SEL Implementation Roadmap. What needs to happen this year to achieve the year’s targets?

2. Consider what observable outcomes will need to occur. Remember, outcome goals reflect direct impact on students or adults. In some districts, the culture may be such that changes in student-level outcomes are expected each year. At the same time, if a district is just getting started with implementing systemic SEL, it may be difficult to set realistic goals that are focused on measurable changes for students. In this case, you may want to consider outcomes related to changes in adult knowledge, skills or behaviors that you can connect to student outcomes over time.

3. Consider what implementation changes will make it possible to achieve the intended outcomes for this year.

Consider what programs, practices, structures, and professional learning will be needed.

- Provide professional learning and coaching for SEL program implementation, coordinate SEL competence assessment and program fidelity assessment at all 5 elementary schools (implementation goal)
- Establish committee inclusive of middle grades and high school teachers and students to participate in research and vetting of SEL programs for secondary schools and select program (implementation goal).

For example, the SEL team whose [example](#) was provided on p. 35 may identify the following intended outcomes and implementation changes for their **Year 1 goals**:

Outcomes:

- 60% of all students participating in SEL program are meeting growth targets on social and emotional competence assessment (year 1 target identified on the Long-term Implementation Roadmap)
- Teachers in all 5 elementary schools implementing an evidence-based SEL curriculum with fidelity

Implementation changes:

- Elementary teachers attend professional learning and coaching for SEL program implementation
- All elementary schools implement SEL competence assessment and program fidelity assessments

4. For each long-term goal, develop one or more annual goals using the template below.

Example: Completed Long-Term SEL SMARTIE Goal Template

Year 1 target that leads up to our long-term goal:

Ex: All 5 elementary schools are implementing an SEL program with fidelity.

<p>In order to move toward target, what change is going to occur in the next year? (specific)</p>	<p>Specifically, address the following questions: What will this look like in action? What is a compelling, actionable description that will help bring together district stakeholders? Ex: Elementary teachers will build a strong classroom community, model warm and respectful classroom interactions, develop shared agreements with students, and use SEL-infused routines for collaboration and reflection.</p>
<p>Who are the stakeholders who will be primarily involved with and affected by this change? (specific, relevant)</p>	<p>Ex: Elementary teachers, elementary students</p>
<p>How will this change be measured? When will measurement take place? (specific, measurable)</p>	<p>Consider existing data sources and any new data sources you may need. Some common sources of data include student administrative data (e.g., attendance, behavior, grades); surveys administered to staff, students, or families on school/classroom climate; student social and emotional competence data. Ex: We will use the program’s built-in fidelity assessment in combination with the Walkthrough Protocol (bit.ly/SELWalkthrough)</p>
<p>How will the process or outcomes address inclusion? (inclusive)</p>	<p>Encourage the team to think critically about traditionally excluded or marginalized groups in the district. The team wants to make sure they are not excluded here and will benefit from this goal. Ex: The team that conducts the walkthrough will include family members from the school community and at least two middle/high school students, as well as school and district SEL team leaders.</p>
<p>How will the process or outcomes address equity? (equitable)</p>	<p>To answer the question on the left, consider how to eliminate or decrease disparities in outcomes between subgroups. Ex: The walkthrough team will receive training from the equity department before conducting walkthroughs so that they are primed to look with this lens during the walkthrough.</p>
<p>By how much will this change occur in the next year? (specific, measurable, attainable)</p>	<p>Ex: Built-in program fidelity assessment will show that 100% of teachers are using all components of the program most weeks or every week, walkthrough data will reflect an average rating of 3 or better in community-building.</p>

Annual goal statement that incorporates all SMARTIE criteria:

Ex: By the time of our final [SEL walkthrough](#) in May of next year, aggregated data collected by teams that include students and family members as well as school and district SEL leaders will show an average rating of 3 or better in community-building at each of our five elementary schools.

5. Repeat this process for each long-term goal you’ve developed so that you now have at least one annual goal to build toward each long-term goal.



Section 2: Develop a One-Year Action Plan for Districtwide SEL Implementation

In a one-year action plan, you'll identify specific points throughout the year when you will reflect on data to review progress toward each annual goal and determine necessary adjustments given your reflection.

1. Complete a table like the example on the next page with each of the following components:

- **Annual goal:** Copy one annual goal into the first row.
- **Rationale for milestone:** Before identifying milestones, discuss with your team the approach you plan to take to achieve progress toward your goal.
 - For example, if your goal is focused on classroom climate, your milestones for this year may revolve around the development of a climate framework, or on the implementation of an evidence-based program focused on supportive classroom climate.
 - Use the [CASEL District Resource Center key activities for SEL implementation](#) to help identify possible areas of focus given your annual goal.
- **Milestone:** Identify what your team should accomplish in each quarter to achieve the annual goal by the end of quarter 4.
- **Key activities:** List priority action steps to achieve each milestone. Use the [CASEL District Resource Center key activities for SEL implementation](#) to identify activities that may support progress toward quarterly milestones.
- **Responsible team member:** Assign an SEL team member who is responsible for moving work forward in each quarter. This may be the same person across quarters. Ideally, ownership will be distributed across team members to ensure the work can build on all team members' strengths and to avoid burnout.
- **Data for tracking progress:** Name source(s) of data that will help your team assess progress toward the milestone using the [Data Sources to Analyze SEL Implementation and Outcomes](#) tool.

[Download a blank One-Year Action Plan template here.](#)

Example: One-Year Action Plan

Annual Goal: Aggregate middle school [school walkthrough data](#) (bit.ly/SELWalkthrough) will have an average rating of 3 or better in community-building.

Rationale for Milestones: Because annual school climate survey results in our middle schools show students don't feel a sense of community with their peers and walkthrough observations have reflected this with lower ratings in community-building, we've identified a list of evidence-based programs (EBPs) that focus on peer to peer interaction, collaboration, and community-building. Our milestones are aligned to this approach.

	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Milestone	Provide district-selected short-list of 5 EBPs that middle schools can select from.	Middle schools select an EBP using a collaborative and inclusive process. Begin offering PL for middle school SEL teams.	Conduct monthly PL sessions for middle school SEL teams. At each middle school, the SEL team will convene small group PLCs monthly.	All middle schools will begin implementing their selected EBP.
Key Activities	1. Align resources for SEL : Designate/identify district coach to support EBP pilot and PL development for middle schools. 2. Adopt (and implement) evidence-based programs and practices : Use the CASEL Program Guides to identify a list of 5 programs that middle schools can select from.	1. Design and implement an SEL professional learning program for schools : Conduct one monthly PL session for middle school SEL teams. 2. Adopt (and implement) evidence-based programs and practices : Introduce district short-list of EBPs to middle schools. Provide schools with resources to facilitate their selection process.	1. Strengthen staff social, emotional, and cultural competence : Provide resources for cohort schools to plan for and begin to implement small group PLCs for classroom teachers. 2. (Adopt and) implement evidence-based programs and practices : All classroom teachers receive EBP curriculum.	1. Implement evidence-based programs and practices : Classroom teachers begin to implement EBP and document practice. 2. Strengthen staff social, emotional, and cultural competence : SEL team continues to convene PLCs monthly.
Responsible Team Member(s)	SEL Coordinator/SEL Coach	District SEL coach	District SEL coach	District SEL coach
Data Needed to Track Progress	Aggregate walkthrough tool data (for baseline)	PL session and PLC attendance	PL session and PLC attendance	Aggregate walkthrough tool data (May)

Now that your SEL team has developed goals and an action plan for the coming year of SEL implementation, you've engaged in the "Implement" phase of systemic SEL implementation and answered the question **"How do we get from where we are now to where we want to be?"** in relation to systemic SEL implementation.

Next Steps

- Use your district's unique templates and your team's style of collaboration to develop a more detailed work plan that can guide regular team check-ins or meeting agendas.
- Regularly reference your goals and action plan and use data to track progress. Make changes to your work plan as needed to ensure goals are met.