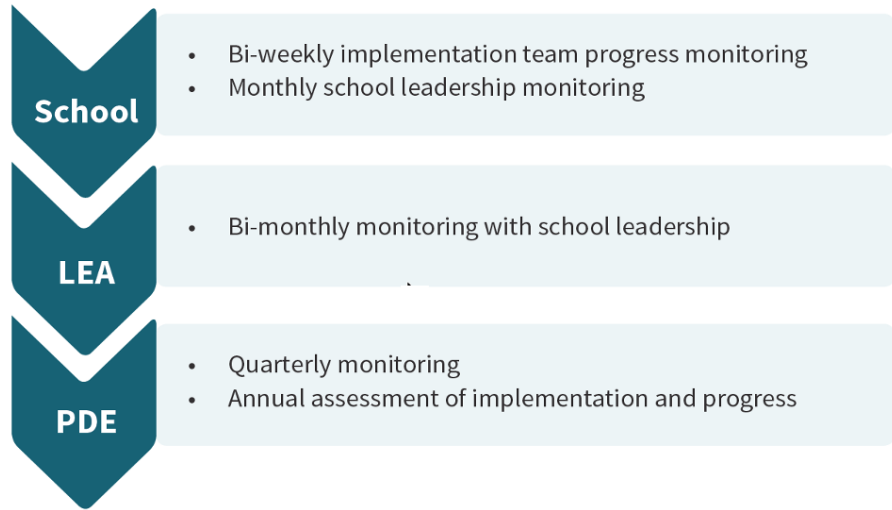


Monitor & Adjust Course

In the work of continuous improvement, monitoring plan progress, and utilizing data to adjust course is when we begin to see the impact of this work.

Our work with schools incorporates monitoring throughout the process. This includes bi-weekly implementation team progress monitoring, monthly/bi-monthly monitoring, quarterly routines, and an annual assessment of implementation and progress.

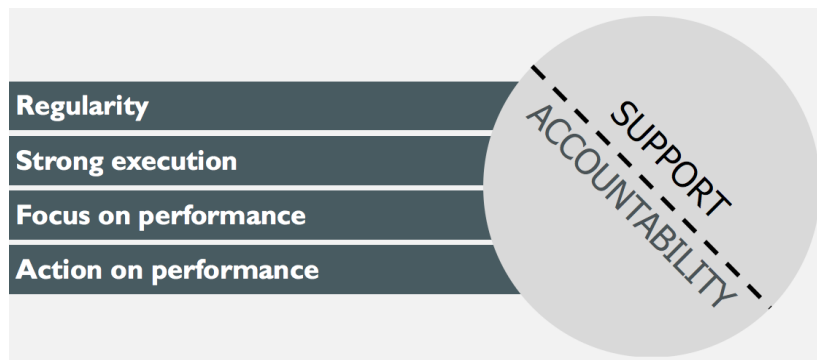


Quarterly monitoring routines are the manner by which the Pennsylvania Department of Education (PDE) monitors the implementation of school improvement plans. This is a requirement of the SEA (state education agency) under ESSA. This monitoring can occur through a combination of submission of quarterly progress reports and virtual and face-to-face on-site reviews with LEA and school personnel. In our work with schools, we implement quarterly monitoring routines and the submission of quarterly reports.

The overarching purpose of quarterly monitoring is to ensure schools are making progress toward their school improvement goals. More specifically, monitoring routines allow us to collect data on progress toward benchmark attainment, accountability, and to formulate solutions and next steps. The purpose of a routine is not to review every piece of data, but rather to celebrate successes, discuss challenges, and define actionable next steps to make meaningful progress toward goals.

What is a routine? Routines are regularly scheduled checkpoints to assess if the implementation is on track. A well-executed routine is an engine that drives implementation forward. It is a source of structure and discipline to create order in complex public sector systems (CCSSO, 2019). Routines serve to monitor performance and provide opportunities for collaboration focused on diagnosing and addressing problems. In short, a routine is an opportunity to have the right people in the room having the right conversation at the right time!

Strong routines have four characteristics in common:



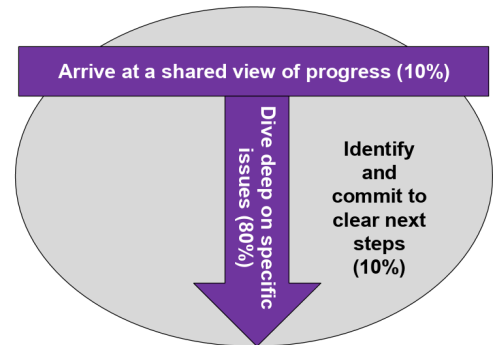
Let's dive into how we will work together to support schools during the implementation of strong and effective routines.

What? *Setting the stage for effective routines*

When? During initial school meetings

Who? SIF, LEA Leader, School Leader/Point of Contact, LEA/School Data Support

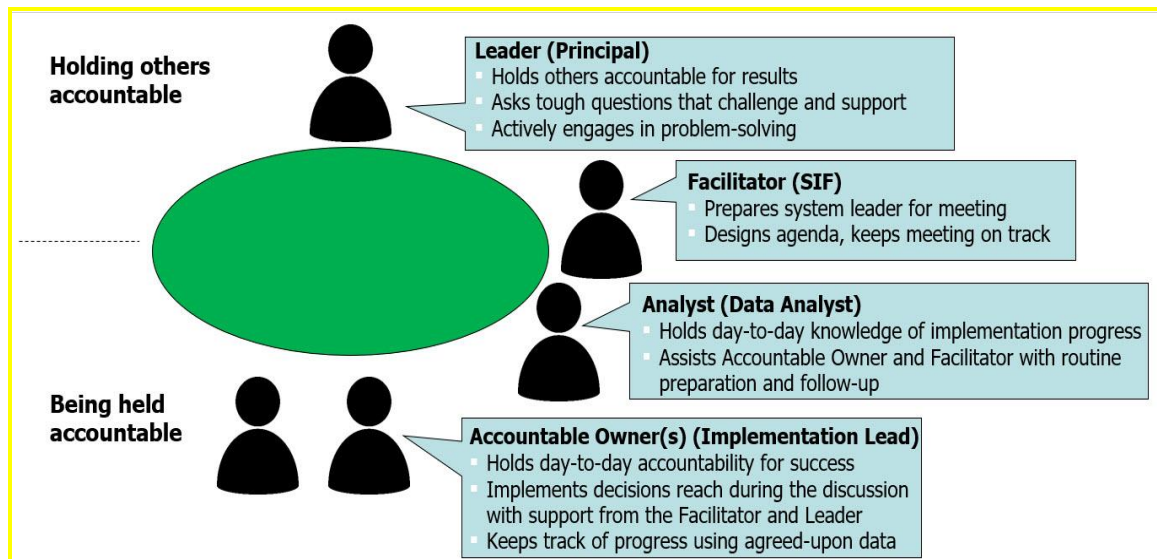
How? In order to support the implementation of strong and effective routines, we must first set the stage for effective work. Remember, a routine is an opportunity to have the right people in the room having the right conversation at the right time. In this stage of our work, we are focused on the right people and the right time.



The SIF should work with the school and LEA leadership to determine dates for the quarterly routines following the collection of data.

Additionally, the SIF should ensure that school and LEA leadership are aware of the purpose of the routines and how the agenda may differ from what they have utilized in other meetings. Remember, routines are structured following a T-Shaped Agenda which allows the participants to arrive at a shared view of progress, to remain focused on a deep dive on specific issues, and identify and commit to clear next steps.

This is also an opportunity to ensure that the right people are available for the routines.



Think about who might fulfill each of the roles during the routine. Are all roles filled and do all understand their roles?

*Note: This is an opportunity to embed steps to collect data throughout the process in the Action Plan if it has not yet been included.

What? *Data Collection for Quarterly Routine*

When? Approximately three-four weeks prior to the quarterly routine.

Who? SIF, LEA Leader, School Leader/Point of Contact

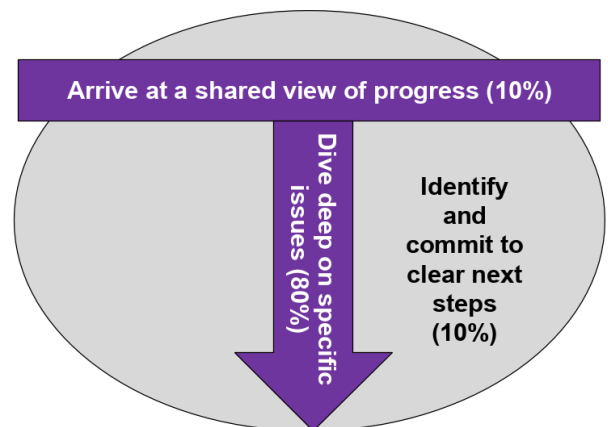
How? SIF will work with the LEA and school leader to determine the timeline. Data aligned to quarterly targets will be collected and organized in a manner that allows a deep understanding of barriers and opportunities. This is also an opportunity to support enhanced data literacy within the school and LEA.

What? *Data Review for Quarterly Routine & Agenda Setting*

When? Approximately two weeks prior to the quarterly routine

Who? SIF, School Leader/Point of Contact

How? The balance of support and accountability serves as an important reminder of the need for flexibility. An effective routine allows for flexibility to focus on the most critical aspects of progress in our schools. This step in the quarterly routine prep process is extremely important. This is when we will work with the school leader/POC to set the agenda, determine objectives, and ensure that all sources of data are available that align with the determined objectives. Remember, the purpose of the routine is to collect data on progress toward benchmark attainment, accountability, formulate solutions, and define the next steps. The SIF or other school improvement consultants may support the school/LEA in compiling any additional data elements. Once there is a clear, shared view of progress, use that to set objectives for the routine.



What? *Sharing of Agenda*

When? Approximately one week prior to the quarterly routine.

Who? School Leader/Point of Contact

How? The school leader/POC will share the final agenda with the accountable owners. He/she will ensure that all routine attendees have access to the data necessary for active engagement in the routine. Routine attendees are expected to review the agenda and data prior to the routine and to share any feedback or questions with the school leader/SIF. The school leader/POC and SIF will work collaboratively to address any feedback or questions prior to the routine.

What? *Facilitation of Routine*

When? This will occur quarterly following the timeline outlined in the school improvement plan

Who? SIF/Designated Facilitator

How? With preparation for the routine complete, you are ready to implement. This is a time when the power is in the preparation. If a routine is well prepared, much of the actual execution should follow easily from the agenda and materials. There are a few key things to remember when you conduct a routine. In particular, a predetermined designee should facilitate the meeting. In our work, this will be the SIF to begin with, however, as capacity is built, the SIF should work with the school leader to determine other parties who may begin to co-facilitate with the SIF. In thinking about the role of facilitator, this does not mean that the facilitator dominates the discussion, but rather that the routine is conducted in a manner that allows the school leader and accountable owners the freedom to dig deep and remain solutions-oriented during their time together. This may mean watching the time and moving things along to meet the objectives laid out in the agenda. It is also recommended that roles be defined within the meeting itself for a timekeeper, notetaker, and next step recorder. The meeting facilitator can also occasionally raise key questions or make suggestions to help focus the discussion. In the role of SIF, we can ask some of the challenging questions during the routine to continue to move the school forward in its continuous improvement processes.

The facilitator manages the process towards the meeting's objectives and focuses on achieving those objectives, freeing everyone else in the meeting to participate fully and engage with the content under discussion. The school leader should focus on the facts and key questions, pushing participants to understand, learn, problem-solve, and agree on an actionable next step. Likewise, the participants should not run the meeting, as they may face an incentive to avoid topics that are less comfortable for them. The ability to successfully facilitate a routine allows the leader and accountable owners to remain focused on the purpose of the routine: which is to celebrate successes, discuss challenges, and define actionable next steps to make meaningful progress toward goals.

What? *After the Meeting: Quarterly Report, Meeting Recap, and Next Steps*

When? Within three business days after a routine

Who? SIF

How? Complete the Quarterly Report in Filemaker. Additionally, the SIF should email routine attendees and any additional identified parties to summarize the meeting and note the next steps established during the routine. If the next steps call for additional work, ensure that the appropriate people are in contact with relevant timelines. Update TA and Support plans. Finally, the SIF should add action items to the next monthly meeting agenda if needed.

What? *Review Communication Plan and Take Action*

When? After the quarterly routine

Who? LEA/School Leader

How? This is an opportunity for the school leader to share successes and overall progress on the school improvement plan with the broader school community and stakeholders. If this step was not included in the communication plan embedded within the school improvement plan, this is also an opportunity for refinement of this element. In Plan Communications, leadership will describe how the LEA will inform internal and external stakeholders of your progress in implementing the approved comprehensive plan.

“Engaging stakeholders is not only required under the law but is a strong best practice to effectively improve schools. Making decisions on education policy in an inclusive and transparent way leads to better decisions and encourages stakeholders to contribute and become partners in achieving the goals in the state and local community. Communities will support improvement strategies that they help to develop. Partnerships with a diversity of stakeholders, including parents, philanthropy, community-based organizations, and others will build local capacity to implement innovative and ambitious strategies for meeting the needs of all students” (CCSSO and Partners for Each and Every Child, 2018).

