

Sample Quarterly Routine Job Aid

1. Plan for planning meeting with school leader
 - a. Add “Agenda to Plan Quarterly Meeting” on each school’s rolling agenda. ([Sample here](#))
 - b. Update the template with details specific to the school
 - i. Add date and time of meeting
 - ii. Add Zoom link
 - iii. Add the school’s goals to the tables under Objective 2.
 - c. Check settings to ensure that the school leader can edit the agenda
2. SIF email school leader (and others needed for planning). [Draft](#)
 - a. If the first quarterly routine, introduce the process. Highlight the idea that this is *their* meeting. The point of the meeting isn’t to present to the state, it’s to gain an understanding of the impact of the work done to date, and an opportunity to acknowledge what has worked, what is challenging, and to identify assistance that would be supportive.
 - b. Review planning process for quarterly and timeline of what needs to happen by when.
 - c. Offer times to schedule 60 or 90 minute planning meeting (depending on the number of goals to be reviewed).
 - d. Ask the leader to prepopulate the tables in Objective 2 with data for each goal and to determine who from the school team will speak to the data as it relates to the goal. (This should not be the principal.) They only need to add the information to the blue rows of the tables, they do not need to enter other information.
 - e. Please reach out to (name of person who can support, if anyone) for support in creating data visuals.
 - f. Provide a due date (needs to be prior to the planning meeting)
3. Optional: If someone from your team is supporting data visualization, they should follow up with an email to the school leader to offer assistance in creating data visuals.
4. SIF: Based on response from school leader schedule planning meeting. Send invite to school leader and others needed for planning (data support person).
5. Hold Planning Meeting:
 - a. Objective 1: Review structure of the quarterly meeting and meeting logistics (in agenda). Reinforce that the school leader will be facilitating. Identify who will be attending the quarterly meeting- encourage the school team to attend.
 - b. Objective 2: Review data and plan discussion
 - c. Objective 3: Steps to prepare for quarterly meeting
 - d. Pluses and Deltas (reflect on meeting)
6. SIF: Send summary of meeting to school leader and other participants within a day of the meeting, pasting the next steps table into the email. (copy RL)
7. SIF: Add template for quarterly meeting to rolling agenda. ([samples here](#))
8. SIF: Check links to data.

9. SIF: Send follow up email or call school leader 3 days before the quarterly meeting to answer questions, review facilitation responsibility, troubleshoot.
10. SIF: After quarterly:
 - a. Complete form in FileMaker
 - b. Follow up on next steps assigned to SIF
 - c. Follow up with school leader on plans to share data with staff

Draft Email Sample

Good Morning...

Your quarterly routine is just around the corner on (date). Some collaborative planning is needed in order to be prepared for the routine. The goal of the routine is for the participants to develop a shared understanding of your data, your successes, and your challenges. This is also the opportunity to identify assistance that would remove barriers and move your work forward. These requests for assistance can be made to the district level team, the Regional Lead, or other specialists.

The planning process includes the following:

- I have a planning agenda prepared (Agenda for Planning Meeting) and will send an invite for a xx minute planning meeting. Times that I have available are below, please let me know what works for you and I'll send an invite by (date)
 - enter days and times available here
 -
- Your team will need to prepare for the planning meeting by:
 - Preparing data for each of the goals listed in the table under Objective 2 in the planning agenda. *[(name) can support with creating data visuals or determining alternative data points]*
 - Determine which member of the school team will speak to the data as it relates to your goal. This is someone other than the school leader. Enter the name in the second blue row of each data table in the agenda.
 - *You only need to complete the blue rows of the Objective 2 tables in the agenda. We will do the remaining work together when we meet.*
- At the planning meeting we'll review the quarterly routine, discuss data, determine questions that may need to be asked of team members and/or additional data points that may be useful.

Your school team has been working so hard at meeting your students' needs and striving to reach your vision. This quarterly routine is the opportunity to share the results of your hard work and identify needs that others can address.

I look forward to hearing from you with the dates for our planning meeting.

Best Regards,

[SIF]

Sample Quarterly Routine Planning Agenda Template

Quarterly Planning Meeting

time
Zoom link is



Attendees:

Facilitator:

Note Taker:

Next Steps Tracker:

Timekeeper:

School Vision:

Meeting Objectives:

- Determine objectives for quarterly routine
- Data discussion to prepare questions and additional data points
- Plan timeline for Improvement Cycle phases 1-3 for SY21-22

Norms:

- Take an inquiry stance
- Ground statements in evidence
- Assume positive intentions
- Start and end on time
- Stick to protocol
- Be here now
- Everyone is prompt and prepared

To Prepare For This Meeting Please:

- Prepare your data for each goal.
- Save the data in a location that will be accessible for SIF and Data Specialist
- Under Objective 2, complete the blue rows in the table for each goal.

Schedule xx minutes

T I M E	MIN	ACTIVITY								
		<p>Objective 1: Determine objectives of the quarterly meeting</p> <p>What insights do you want to gain as a result of the data review? Who needs to be present in order to gain that insight? What process or protocol would support this objective? <i>(Notice & Wonder, Atlas, Data Driven Dialogue, other)</i></p> <p>Notes:</p>								
		<p>Objective 2: Review data and plan next steps.</p> <p>(15 minutes per goal)</p> <ol style="list-style-type: none"> 1. Review and discuss data. What do you notice? What do you wonder? 2. What questions do you want to discuss with the team?. 3. Identify additional data sources that may support the discussion. 4. Review next steps <p>(10 minutes)</p> <p>Identify which goal/s will be the focus of discussion at the quarterly meeting.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="background-color: #e1eef6; padding: 5px;">Goal 1 <i>(SIF pre-populate)</i></td> <td style="background-color: #e1eef6; padding: 5px;">Quarter 1 Data <i>(School leader enter data here.)</i></td> </tr> <tr> <td style="padding: 5px;">What do you notice and wonder about this datapoint?</td> <td style="padding: 5px;">Notice: Wonder:</td> </tr> <tr> <td style="padding: 5px;">What additional data sources can we pull to answer these questions?</td> <td style="padding: 5px;"></td> </tr> <tr> <td style="padding: 5px;">Who from the school team will speak to this data as it relates to your goal? <i>(This is someone other than the school principal.)</i></td> <td style="padding: 5px;"></td> </tr> </table>	Goal 1 <i>(SIF pre-populate)</i>	Quarter 1 Data <i>(School leader enter data here.)</i>	What do you notice and wonder about this datapoint?	Notice: Wonder:	What additional data sources can we pull to answer these questions?		Who from the school team will speak to this data as it relates to your goal? <i>(This is someone other than the school principal.)</i>	
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Next Steps:	Share the data and the questions with the team member who will speak to the data. Review the data and questions together. This is an opportunity to identify areas for the team to problem-solve and request assistance.
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Goal 2 <i>(SIF pre-populate)</i>	Quarter 1 Data <i>(School leader enter data here.)</i>
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What additional data sources can we pull to answer these questions?	
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Next Steps:	Share the data and the questions with the team member who will speak to the data. Review the data and questions together. This is an opportunity to identify areas for the team to problem-solve and request assistance.

Goal 3 <i>(SIF pre-populate)</i>	Quarter 1 Data <i>(School leader enter data here.)</i>
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Next Steps:	Share the data and the questions with the team member who will speak to the data. Review the data and questions together. This is an opportunity to identify areas for the team to problem-solve and

request assistance.

Notes:

(In January) Objective 3: Plan steps and the timeline for Improvement Cycle Phases 1-3 for SY21-22

Process	Discussion	Decision/Timeline
Committee		
Surveys -Student -Staff -Parent		
Focus Groups		
Facilitated Self Assessment		
Fishbone/5Whys		
Priority Statements		
Evidence-Based Practice Selection/Confirmation		
Plan Draft Work: - Goals - Actions aligned to Evidence-based practices - Professional devel plan - Communication plan		
Committee Review of Plan		
Plan Completion		By 5/5
Public Posting		By 5/10
Superintendent & Board Approval		

SIF Approval		By 6/15
Plan finalized in FRPP		By 6/30

10 **Objective 3: Steps to Prepare for Quarterly Meeting**

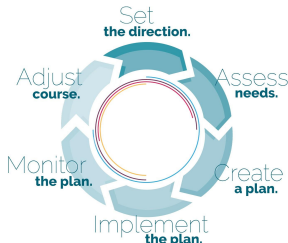
What will happen	By Whom	By When
Add a quarterly meeting agenda to the school folder and send a link to the school leader.	SIF	Day of planning meeting
Prepare an agenda with information from this planning meeting. Add links to data and ensure that everyone will have access. Email SIF with questions and to review the final agenda.		1.5 week prior to quarterly meeting
When the agenda is final, send a link to the agenda to all meeting participants. Ask each participant to review the agenda and the data prior to the meeting.		1 week prior to quarterly meeting
Check with the school leader to review roles, answer questions, and review links to data.	SIF	2 days prior to quarterly
Determine plan for sharing data with school staff.		

5 **What worked well about this meeting and what we would have liked to change?**

Plus	Delta

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Sample Quarterly Routine Agendas

<h1 style="margin: 0;">Quarterly Mtg School Name</h1>		
Date/Time Zoom Link		
Attendees:		
Topic: Quarterly Review of Action Plan and Benchmarks		
School Vision:		
To Prepare For This Meeting Please: <ul style="list-style-type: none"> School leader: Send members of the quarterly meeting the agenda and data by (date) Members attending the meeting: Review the data (links) in the tables before the meeting to prepare questions for the meeting. Members attending the meeting: Add questions about the data to the agenda by (date). 		
Schedule [xx minutes]		
TIME	MINUTES	ACTIVITY
	5	<p>Check-in and review how objectives of this meeting connect to our ongoing work</p> <ul style="list-style-type: none"> Come to an understanding about the target data Identify challenges/barriers and define achievements Define next steps for the school including “ask” from LEA if barriers are beyond the control of the school <p>Review Role Assignments Facilitator: Analysts: Accountable Owners:</p>

Note Taker:
 Timekeeper:
 Next Step Tracker:
 Chat Box Monitor:

Meeting Norms:

- Take an inquiry stance
- Ground statements in evidence
- Assume positive intentions
- Start and end on time
- Stick to protocol
- Be here now

0

Review next steps from our previous meeting

What will happen	By Whom	By When	Status ?

10
min
per
goal

Review of Benchmark Goals and Data

- Come to an understanding about the benchmark data
- Identify barriers or define achievements
- Define the next steps for the school including “ask” from LEA if barriers are beyond the control of the school

Goal 1 <i>(SIF pre-populate)</i>	Quarter 1 Data <i>(School leader enter data here from planning meeting.)</i>
Accountable Owner	
Noticings and wonderings about the data.	

What additional data sources have we reviewed?	
In what ways has the action plan impacted this data? How might you know?	
Requests for Technical Assistance from LEA, RIT, or others	

Goal 2 <i>(SIF pre-populate)</i>	Quarter 1 Data <i>(School leader enter data here from planning meeting.)</i>
Accountable Owner	
Noticings and wonderings about the data.	
What additional data sources have we reviewed?	
In what ways has the action plan impacted this data? How might you know?	
Requests for Technical Assistance from LEA, RIT, or others	

Goal 3 <i>(SIF pre-populate)</i>	Quarter 1 Data <i>(School leader enter data here from planning meeting.)</i>
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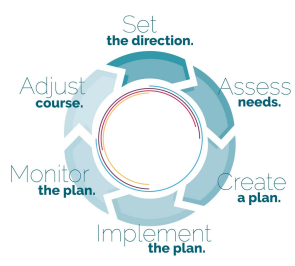
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**What worked well about this meeting and what we would have liked to change?
How did we do following our Norms?**

How did the process of this meeting support or hinder the team's understanding of the current status?	What could be done to improve the quarterly check in?

January Quarterly Mtg

Date/Time
Zoom Link



Attendees:

Topic: Quarterly Review of Action Plan and Benchmarks

School Vision:

To Prepare For This Meeting Please:

- School leader: Send members of the quarterly meeting the agenda and data by (date)
- Members attending the meeting: Review the data (links) in the tables before the meeting to prepare questions for the meeting.
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Schedule [xx minutes]

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Who will describe this data?	
What work took place in this area since last quarter?	
How does this data compare to the Q1 data?	
Did we meet the Q2 target?	
What is the annual goal that we are striving for?	
Noticings and wonderings about the data.	
What next steps are necessary to reach the goal?	
In what ways and the LEA, RIT, or others support the next steps?	

Goal 2 <i>(SIF pre-populate)</i>	Quarter 1 Data <i>(School leader enter data here from planning meeting.)</i>
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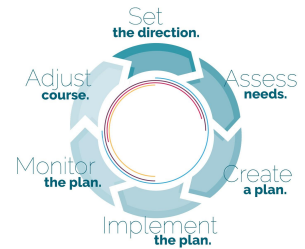
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3 Quarterly Mtg

Date/Time
Zoom Link



Attendees:

Topic: Quarterly Review of Action Plan and Benchmarks

School Vision:

To Prepare For This Meeting Please:

- School leader: Send members of the quarterly meeting the agenda and data by (date)
- Members attending the meeting: Review the data (links) in the tables before the meeting to prepare questions for the meeting.
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Schedule [xx minutes]

TIME	MIN	ACTIVITY
	5	Check-in

	<p>Objectives</p> <ul style="list-style-type: none"> • Come to an understanding about the target data • Identify challenges/barriers and define achievements • Define next steps for the school including “ask” from LEA if barriers are beyond the control of the school <p>Review Role Assignments Facilitator: Note Taker: Timekeeper: Next Step Tracker:</p> <p>Meeting Norms:</p> <ul style="list-style-type: none"> • Take an inquiry stance • Ground statements in evidence • Assume positive intentions • Start and end on time • Stick to protocol • Be here now
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end of year goals?
Implications: How can this inform your work in the next month?

Q2 Target	Actual

Review next steps from this meeting

Next Step	By Whom?	By When?	Status?

5

What worked well about this meeting and what we would have liked to change?

How did the process of this meeting support or hinder the team's understanding of the current status?	What could be done to improve the quarterly check in?
