



Marshall Street

# Navigating Data for Multi-Tiered Systems of Support





## EQUITY-BASED PRACTICES FOR USING DATA AT THE DISTRICT, SCHOOL, AND CLASSROOM LEVELS TO ACCELERATE STUDENT SUPPORTS







*A Collection of Research-to-Impact Practices Developed with the Networked Improvement Community for Students with Disabilities*

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# Preface

In *Navigating Data for Multi-Tiered Systems of Support: Equity-based practices for using data at the district, school, and classroom levels to accelerate student supports*, we share a set of best practices for leveraging data to respond to student academic and social-emotional needs with a particular focus on Black and Latinx students with disabilities experiencing poverty. The Networked Improvement Community for Students with Disabilities (NIC), a group of 10 public charter school networks serving more than 75,000 students nationwide, identified the best practices through their work between 2019 and 2023.

Led by **Marshall Street** at Summit Public Schools, in partnership with technical assistance providers NIRN, RTI International, SRI International, and SWIFT Education Center, the purpose of the three-year NIC was to systematically improve the way our education system serves Black and Latinx students with disabilities experiencing poverty and share these solutions with school systems everywhere. This report is funded by the Gates Foundation. The findings and conclusions contained within are those of the authors and do not necessarily reflect positions or policies of the Gates Foundation.

The NIC used continuous improvement to translate existing research for improving learning outcomes into best practices and to iterate the practices to ensure they worked in a variety of school contexts.

In ***Navigating Data for Multi-Tiered Systems of Support: Equity-based practices for using data at the district, school, and classroom levels to accelerate student supports***, we share the results of this vital work:

- A **literature review** summarizing the key research related to multi-tiered systems of support
- Three **best practices** in which schools in the NIC used data to individualize student supports. Each best practice includes:
  - Case studies highlighting how schools in the NIC implemented the practices
  - Step-by-step implementation guidance
  - Key prerequisites and accelerants for successful implementation in any context
- Two additional **case studies**, which look at how network-level leaders can use data as a team to more effectively support schools and how another network used a text messaging intervention to engage families in reviewing students' grades
- One **guidance document** that provides recommendations to consider when creating and revising data dashboards to meet the needs of school staff to implement these practices

We share these best practices so that any school in the country can leverage the learning from the NIC to accelerate dramatic gains in learning outcomes for their students with disabilities. We hope that administrators and educators across the country can use the stories within this guide to build their school cultures of continuous improvement as well.

# Acknowledgments

## About Marshall Street

Marshall Street is a division of Summit Public Schools based in Redwood City, California. Marshall draws from more than 15 years of institutional knowledge and extensive experience in school improvement. Through our programs, we increase the capacity of our school partners to carry their work forward in the ways most meaningful to their communities.

Continuous Improvement is a set of principles and practices to help educators "get better at getting better." Marshall's Continuous Improvement team uses these tools to tackle intricate, systems-level problems in K–12 education. From 2019 to 2023, Marshall led a multi-year Networked Improvement Community (NIC) to make dramatic gains in the learning experiences, environments, and outcomes for Black and Latinx students with disabilities experiencing poverty.

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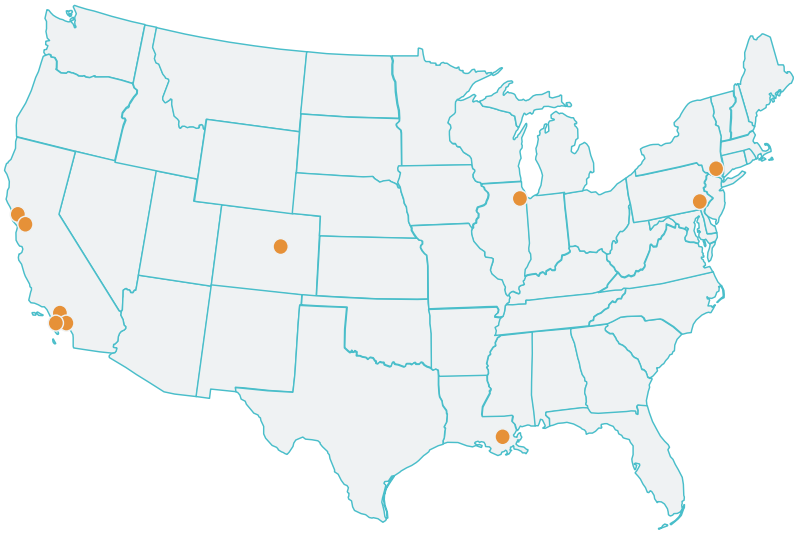
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# Overview

## NAVIGATING DATA FOR MULTI-TIERED SYSTEMS OF SUPPORT

A collection of research-to-impact practices developed with the Networked Improvement Community for Students with Disabilities

COLLECTION OVERVIEW

# Navigating Data for Multi-Tiered Systems of Support

## Introduction

### The Challenge

#### America's public schools fall short in meeting the needs of students with disabilities.

Students with disabilities consistently perform at levels below their peers without disabilities. On the most recent administration of the National Assessment of Educational Progress, **8th grade students with disabilities performed 39–41 points lower than their peers without disabilities in reading and math**,[1] illustrating just how deeply schools are failing students with disabilities. These disparities persist long after graduation, as students with disabilities are less likely than their peers to enroll in postsecondary school, to be productively engaged in community activities, to live independently, and to achieve financial independence.[2]

#### Implementation of MTSS is inconsistent in secondary schools.

Multi-tiered systems of support (MTSS) have been associated with improved academic achievement and reduced incidents of suspension and other punitive disciplinary actions for students.[3] Students with disabilities who attend schools with strong MTSS implementations also experience improved academic and behavioral outcomes and increased graduation rates.[4] These findings indicate one way to improve the poor outcomes of students with disabilities is to implement MTSS at scale. MTSS implementation at the secondary level, however, still lags behind elementary schools, meaning that students with disabilities in middle and high schools do not consistently receive a benefit from this structured approach to data-based decision-making and intervention planning.[5] Using data-driven early warning systems that identify students who need additional support, and then responding to that data and implementing appropriate interventions, is likely a key strategy for using MTSS to improve outcomes for secondary students.[6]

# What is MTSS?

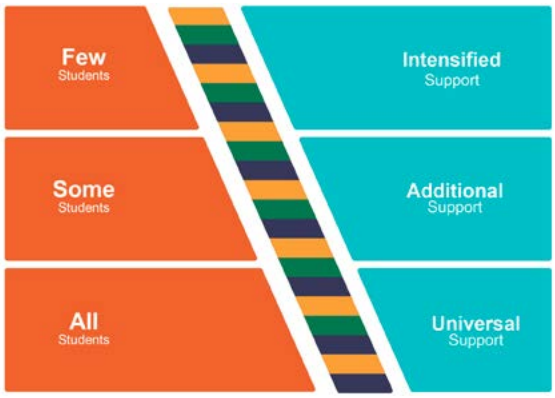
## DEFINITION

A multi-tiered system of support (MTSS) is a preventative framework that leverages data to organize instruction and intervention to improve academic, behavioral, and social-emotional outcomes for students.[7]

## COMPONENTS

The MTSS framework is composed of four essential components:[8]

1. **Screening** — regularly administered assessments to identify students at risk for poor academic, social-emotional, or behavioral outcomes
2. **Progress monitoring** — the ongoing, frequent collection and use of data to:
   A. assess students' performance
   B. quantify a student's rate of improvement or responsiveness to instruction or intervention
   C. evaluate the effectiveness of instruction and intervention using valid and reliable measures[9]
3. **A multi-level prevention system** — increasingly intensive instruction and intervention organized across three tiers, with "Tier 1" referring to evidence-based, high-quality schoolwide academic, social-emotional, and behavioral supports for **all students**, "Tier 2" referring to small-group, standardized interventions aligned with identified student needs **for some students**, and "Tier 3" referring to intensive and individualized supports for **few students** with ongoing, intensive needs
4. **Data-based decision-making** — the use of data to make decisions about instruction, movement within the multi-level prevention system, allocation of resources, and identification of students with disabilities




*Equity-Based MTSS Model by Swift Schools*

## HOW IT HELPS STUDENTS

Implementation of multi-tiered systems of support results in improved academic, social-emotional, and behavioral outcomes for students.[10] The features of MTSS that contribute to improved and more equitable outcomes for students include the following:

- **Decisions made within an MTSS framework are driven by data.**
- **MTSS emphasizes high-quality, evidence-based instruction at all tiers.**
- **Collaborative, data-driven decision-making and strong leadership are core to effective MTSS.**
- **MTSS represents a systematic approach to pursuing equitable student outcomes.**

**Benefits of consistent MTSS implementation include the following:**

- It allows for all students to receive timely support for their unique student needs, including academic, behavioral, and social-emotional needs.[11]
- Educators can more efficiently identify student needs and respond to them in a timely manner.[12]
- Fewer students "fall through the cracks."[13]
- Students with disabilities are less stigmatized for receiving additional supports and services.[14]

## Many schools lack the resources to build robust data systems for instructional decision-making.

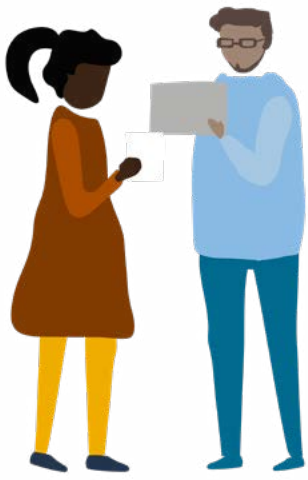
Unfortunately, many schools lack access to or funding for data systems and infrastructure that are key to implementing MTSS well, such as progress-monitoring tools, aligned curriculum, and intervention programs based on evidence-based practices that would support cycles of instructional improvement as part of an MTSS.[15] Building or having another company build these custom solutions in ways that enable effective and efficient instructional decision-making requires capacity or money that most schools do not have available. The staff training and planning time necessary to use these tools effectively also requires additional funds. Without preplanning for the allocation of resources toward data systems aligned to their instructional needs, schools cannot make changes that will have marked effects on student learning and achievement.[16]

## Existing data infrastructures are not designed to support data-driven decision-making.

Over the last 30 years, student information systems have evolved from simply reporting student enrollment data to including data from state standardized assessments, diagnostic and interim assessments, and student course and assignment grades. These evolutions have not always accounted for the different ways in which educators interact with data, making it challenging for schools to use the data they have collected for their decision-making. As schools more regularly use data in structured ways to reflect on practice and drive instructional decisions as part of their MTSS, they need ways to look at data at multiple levels and disaggregate results by subgroups — that is, they need tools designed to drive instructional change. To make the development of these tools possible for educators to effectively review student data and monitor their progress, system-wide support for data infrastructure, systems, structures, and training are essential.[17]

## Effective use of data requires change to systems and culture.

Schools often train educators to interpret data from student information systems in a single professional development but fail to build regular, structured time for educators to make use of these skills.[18] To avoid this, school leaders can reinforce a culture of continuous improvement by devoting time for educators to participate in cycles of reviewing data, identifying students who need additional support, creating action plans, and assessing the effectiveness of those action plans.[19] However, building these data routines into existing systems and structures — such as coaching sessions, regular professional development, or collaborative time between educators — can be difficult. As a result, data routines fail to become habits or part of the educator workflow, and knowledge built in training is lost over time.



# Our Approach

MTSS involves a host of essential components to ensure schools have a system for responding to students' individual needs. Keenly aware of the power of data to drive decision-making, schools within the NIC embraced a commitment to developing the tools, routines, and systems needed to leverage data effectively within an MTSS approach. The NIC's commitment to focusing on data does not ignore the other aspects of successful MTSS approaches, but it highlights how the collection and use of data is fundamental to the other pieces of an MTSS system. This work was guided by the following principles:

- **EFFECTIVE DATA-DRIVEN DECISION-MAKING RELIES ON TOOLS AND INFRASTRUCTURE.**
- **DATA-DRIVEN DECISION-MAKING IS BEST FACILITATED IN COLLABORATIVE STRUCTURES THAT ENGAGE THE RIGHT PEOPLE.**
- **CLEARLY ARTICULATED AND CONSISTENTLY IMPLEMENTED ROUTINES FACILITATE EFFICIENT AND EFFECTIVE DATA-DRIVEN DECISION-MAKING.**

Together these principles help educators implementing MTSS address gaps at all levels of the school system, from the network all the way to teachers. In turn, this pushes them to prioritize student groups positioned furthest from opportunity, like students with disabilities who are Black, Latinx, and living in poverty. As educators continuously review data and assess their practices to adjust instruction to meet the needs of priority groups, improved teacher practices and new instructional strategies benefit all students.

## Data Tools and Infrastructure

To effectively implement an MTSS framework, schools need system-wide support for data collection, analysis, and decision-making. Data infrastructure should facilitate the efficient collection of data describing a range of student outcomes,[20] allow for monitoring student responsiveness to instruction and intervention, and support educators in analyzing data to make informed decisions about planning content and instructional strategies.[21] **STEM Prep** and **Collegiate Academies** built their own systems to enable educators to transfer data from existing student information systems into more usable formats for regular analysis and instructional decision-making. The experience of both networks and existing research on MTSS demonstrate that school leaders and educators also needed training, protected time, and resources to learn how to use data and make informed decisions about planning content and instructional strategies to meet all students' needs.[22]

## Teams that Bring the Right People Together

To meet the needs of students successfully within an MTSS approach, diverse teams of educators need to collaboratively and routinely analyze trends in student performance, including data on student subgroups. This needs to happen at the classroom, school, and district level. To have the greatest impact at the school level, site leaders need to bring together teams of educators with diverse perspectives, create time and space for different types of school teams to regularly review and respond

to data, and support the use of collaborative problem-solving to find the best strategies to meet students' needs. **Summit Public Schools** and **STEM Prep** engaged grade-level teams to regularly analyze student data in order to collaboratively identify potential interventions to address specific student needs. **Mastery Schools** created an interdisciplinary team to address students' postsecondary readiness needs using data on a biweekly basis.

**Central office teams also need to gather leaders across the district to collaboratively take an MTSS approach to thinking about how they use data to individualize the different levels of support they are providing to schools.** **Green Dot Public Schools** realized that they needed to individualize the types and intensity of supports they gave schools rather than looking only at aggregated data and making network-wide decisions for all schools through a one-size-fits-all lens. Their team of network-level leaders looked at disaggregated data by school as well as by student groups so they could devise strategies to support school leaders' work to improve outcomes at their schools.

**Bringing the right people together also includes regularly engaging students and families in routines that teach them how to analyze their own data, develop goals using data, and create plans that help them meet those goals.** For example, **STRIVE Prep** engaged families using text messaging to give families information about students' grades and a channel to communicate with schools about their students' academic progress. Additionally, **KIPP Northern California** and **STRIVE Prep** created 1:1 student-conferencing structures to teach students how to use their data from course and assignment grades to set goals and make plans to achieve them. These types of engagement are particularly important for families who are Latinx, Black, and living in poverty because they have historically been disenfranchised by the education system and disempowered from accessing student grades, communicating with educators, or advocating for their students' needs.

## Routines and Regular Data Analysis

By creating regular, dedicated time for teams to engage in data routines, educators can respond to students' needs more quickly and effectively, improving student outcomes. Teams should meet at regular intervals with clear agendas and meeting protocols that guide educators to:

1. Identify which students or disaggregated student groups need additional support on which skills
2. Choose the best strategy to address needs
3. Make a plan for how to implement the strategy
4. Reassess to determine the effectiveness of the strategy used
5. Choose to continue to use the strategy, adapt the strategy, or discontinue using the strategy

The NIC, as a community, found it necessary to develop and refine strategies for integrating the use of data into educators' workflow to ensure the timely response to students' needs. Routines were developed at the individual teacher, team, school, and network levels to support system-wide use of data. **Collegiate Academies, STEM Prep, Summit Public Schools,** and **Green Dot Public Schools** all created structures that provide educators with regular, dedicated time to engage in data routines. **Collegiate Academies** built these routines into their co-teachers' co-planning meetings. **Green Dot**

**Public Schools** instituted quarterly co-planning days during which co-teachers review data and create longer-term plans together. **STEM Prep** and **Summit Public Schools** built data routines into their existing grade-level team meetings so that teams of educators can collaborate to find potential solutions to meet students' needs.

For these data routines to be effective, school leaders need to consider the types of training necessary to help educators develop the skills and then habits around using data for daily instructional planning. It cannot be overlooked that staff need training in analyzing data and identifying appropriate interventions for students. In particular, data for subgroups of students, such as our priority population, should be disaggregated so that their unique data trends and needs are not obscured by overall averages. **Collegiate Academies** and **Summit Public Schools** found that initial professional development is best supported with regular coaching to ensure that educators can analyze and respond to data with confidence. Coaches can also help educators learn how to build their own regular practice of reviewing and responding to data to ensure that all learners are mastering content and that their teaching practice improves over time.

Data-driven decision-making processes within an MTSS can be implemented from the district level down to the student level so that every stakeholder uses data to guide decisions in the interest of improved student outcomes. **This collection of practices highlights the ways that data is essential to meeting the needs of students who are furthest from opportunity so that educators can address their needs as responsively and efficiently as possible.**



**STUDENTS AND FAMILIES**

Student Conferencing for Life and Academic Skills

How to Improve Family Engagement with Text Messaging



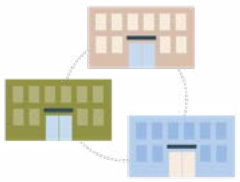
**CLASSROOM**

Implementing Routine Data Cycles to Rapidly Address Student Needs



**SCHOOL**

Establishing Effective Data Routines in School-Based Teams



**NETWORK**

How Network Leaders Use Data to Respond to School-Based Needs

# Enabling Conditions

Each chapter within the collection identifies the prerequisites needed to implement each specific practice. However, a set of overarching prerequisites is shared across all practices:

- Dedicated and protected collaboration time for teachers, grade-level teams, and instructional coaches to collect and analyze student-level data by class, course, and grade levels
- Accessible data readily available in a data tool or dashboard
- A school-wide commitment to collaborative problem-solving that is supported by a defined set of strategies that faculty can choose from to respond to a variety of needs

## Dedicated Time

Educators need dedicated time to analyze data, design interventions, and monitor the progress of those interventions. Scheduling time in the school week for data analysis, problem-solving concerns in the data, planning, and implementing tiered supports is a key requirement for MTSS to be successful.[23] Although individuals and teams may meet at different cadences based on their purposes, protecting time for data analysis and planning is essential, and schools must account for all stakeholders when building schedules.

The table below describes different purposes and cadences that various stakeholder groups may employ.

| GROUP | DATA VIEW | PURPOSE | CADENCE |
|---|---|---|---|
| Individual Teachers | Student-level by class and/or course | • Interventions based on course and school goals<br>• Instructional adaptations for tomorrow's class/course | Daily/Weekly |
| Grade-Level and/or Content Area Teams | Student-level and subgroups by grade level and course | • Interventions based on school goals<br>• Instructional adaptations for next week<br>• Family communications<br>• Celebrations (e.g., awards for progress) | Weekly |
| Instructional Coaching | Student-level and subgroups by class and/or course | • Shared problem-solving for meeting students' needs<br>• Curricular adaptations<br>• Orchestrating support that may require additional staff, space, or time | Weekly/ Biweekly |

# Accessible Data Systems

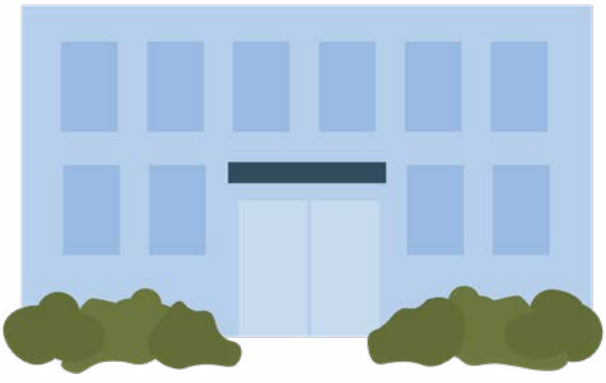
Most school systems have one or more data or student information systems that house student data. Many of these tools are simply gradebooks that do not allow educators to see patterns across assignments or standards, while others report standardized test scores but do not provide visibility into students' specific errors. While in the NIC, **Collegiate Academies** and **STEM Prep** found that their existing data systems did not always facilitate targeted data analysis and intervention planning for educators. In response, both networks built alternative data systems that gave educators different ways to look at their student data to more easily make instructional decisions. Some tools are more adaptable than others (i.e., they allow for individual school or network customization) or better fit the purpose a school or team has for the data. Much of the usefulness of a data system comes down to the accessibility of the data tool (e.g., user experience, ease of navigation, and ability to see a range of data) and the ease with which educators can sort or filter data. When selecting a data system, feedback from a variety of educators is essential to understanding whether a given data tool will work for a given purpose or not.

Schools may discover a need for custom dashboards to facilitate data protocols. Excel, Google Sheets, and Tableau are examples of platforms that can be leveraged for this purpose. To learn more about the process for creating a data dashboard, see **How-To: Design and Prototype a Data Dashboard**.

# Schoolwide Commitment to Problem-Solving

While it is important that schools or networks create structures and resources that help educators determine the best strategy to meet identified needs, an underlying commitment to collaborative problem-solving is likely to yield stronger results than problem-solving by individual stakeholders. Educators who work together to find new solutions, especially to the most challenging situations, can build their toolbox of strategies (**a list of interventions, for example**) more quickly. In addition, schools that foster a commitment to collaborative problem-solving are likely to have teachers who engage in informal activities to solve problems without waiting for formal structures such as grade-level or departmental meetings.

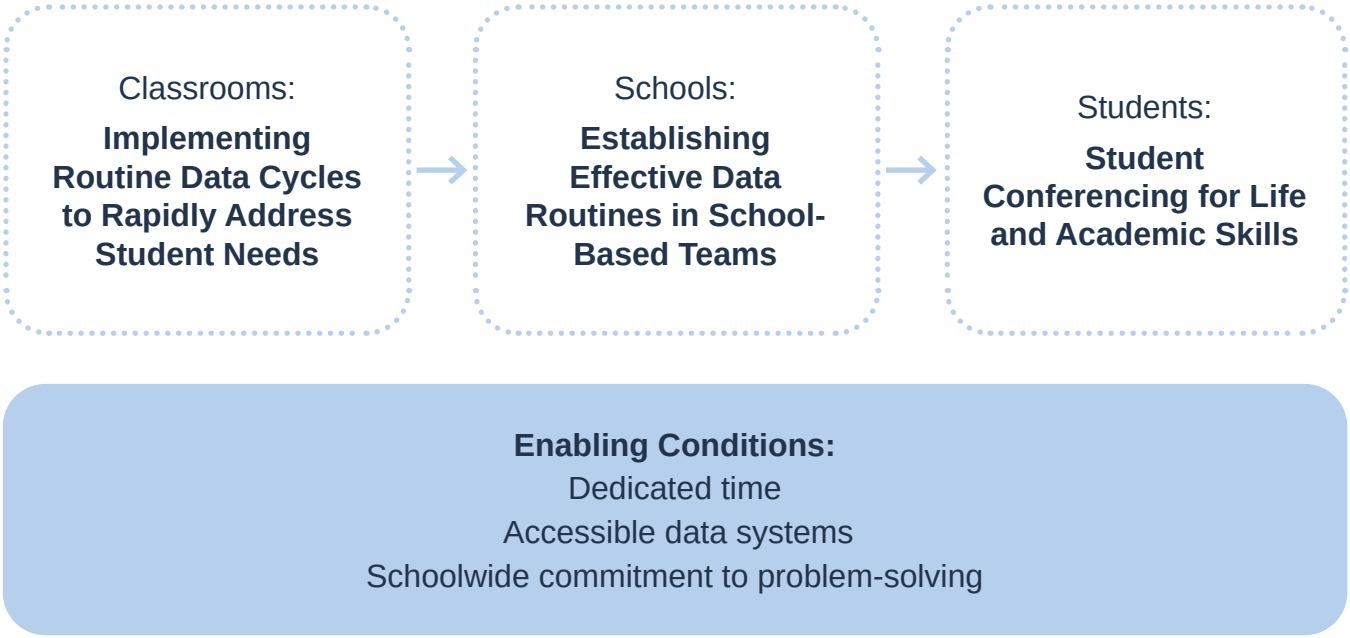
Schools will benefit from developing a set of easily accessible resources that educators can draw on when problem-solving. Networks or schools can use intranets, websites, or cloud storage systems that allow educators to access resources and information from anywhere. This repository should be regularly updated so that new resources and strategies can be added and older ones updated to include adaptations. When relevant, resources should indicate that they are only recommended for specific populations. A protocol for vetting resources and strategies can ensure that they are high-quality and effective.



# The Collection

This collection includes **three best practices** and **two case studies** essential to the work of improving the use of data to devise tiered levels of support for schools, students, and families on behalf of improving learning outcomes for all students, as well as a **guidance document** to use when considering how to set up and improve data tools to put these practices into action.

Each of the practices detailed in this collection is an independently strong and valuable practice for improving the use of data by educators and teams within an MTSS model to make gains for our priority population. However, when implemented layer by layer, the steps described in this collection strengthen data practices at all levels of an education system. Through these practices, schools in the NIC embedded MTSS within every level of their school systems, with each level benefitting from the levels above. The combined effect helped NIC schools to address the needs of students in order to improve their outcomes.




The audience for this collection is educators, schools, and networks who believe that all students are capable of increasing their academic achievement, who fundamentally believe that it is the system's responsibility to ensure this is a reality for all students it serves, and who are looking for ideas on how to initiate or refine their approach to this work. While many research papers, reports, and technical assistance centers provide guidance on the implementation of an MTSS framework, this collection is unique in that, rather than providing a comprehensive explanation of all aspects of MTSS, it offers unique guidance about improving data-driven decision-making and teaming practices within the MTSS model to serve our priority population:

- It ties together multiple elements critical to addressing the needs of all students, specifically for Black and Latinx students with disabilities experiencing poverty, within an MTSS framework.

- It emphasizes the importance of using data at all levels of the school system along with the engagement of individuals from all levels of the school system.
- It grounds each practice in both foundational and current research while emphasizing (1) detailed, real-world examples of the practice as implemented in secondary schools and classrooms within the NIC and (2) a step-by-step guide to the implementation of the practice.

## Chapter 1: Implementing Routine Data Cycles to Rapidly Address Student Needs

System-wide data routines are necessary to support educators to review classroom-level data at least biweekly to determine student needs and drive instructional decision-making and interventions. In addition, educators benefit from accessible data systems that allow them to sort student data in meaningful ways and disaggregate data by subgroups. This chapter details the steps a network or school can take to design regular data routines so educators can respond in a timely manner to students' needs. The chapter also describes how data systems and professional development can help strengthen these data routines for schools.

## Chapter 2: Establishing Effective Data Routines in School-Based Teams

While educators need to individually analyze data and make instructional decisions based on the individual student needs shown in that data, school-based teams also need to gather and use data to coordinate timely, targeted support for students across grade-, department-, or other site-level teams. This chapter describes different types of school-based teams and their purposes. It also discusses how teams can create useful structures to ensure efficient meetings and create accountability for the resulting action items. Strong data routines used by teams of educators can help supplement the individual and regular use of data for decision-making in schools.

## Chapter 3: Student Conferencing for Life and Academic Skills

Student conferencing is a regular, consistent time during class for teachers to coach students 1:1 on how to set goals, make plans to achieve their goals, enact their plans, and reflect on their progress. Any school staff member can conduct conferencing with students, but the schools in the NIC that implemented this practice piloted conferencing with special educators and students with disabilities. This chapter explains how 1:1 student conferencing can be implemented in a variety of configurations based on individual school capacity and student needs. The steps outline the skills students need in order to begin conferencing as well as those they can gain by participating in conferencing.

## Case Study: How Network Leaders Use Data to Respond to School-Based Needs: Green Dot Public Schools

The use of MTSS is not confined within the walls of each school building. It can also be used at a system level when network leaders consider how to best support each of their schools. Green Dot Public Schools built a team of network-level leaders who meet monthly to analyze data and identify tiered supports for schools based on their needs. This case study describes the journey that Green Dot's leaders went through to consistently review data through an equity lens and devise strategies to best support the schools within their own locus of control.

## Case Study: How to Improve Family Engagement with Text Messaging: STRIVE Prep

The COVID-19 pandemic physically disconnected students and families from their schools — sometimes for multiple years — forcing school and network leaders to consider new ways to re-engage families in the education system. STRIVE Prep developed a routine of using a text-messaging intervention to help ensure that all families could stay informed about their students' academic progress and communicate with their school in a new way. This case study details how STRIVE Prep piloted their text messaging strategy with the families of students with disabilities before expanding it to all students at one of their schools. The case study also includes the steps a school can take to implement a similar text messaging intervention.

# How to Approach this Collection

We recommend readers begin with chapter 1, as this chapter provides foundational guidance on how classroom teachers can best use data to identify student needs, design interventions, and plan interventions. After chapter 1, readers are encouraged to explore chapters 2 and 3 for insights on how to use data within site-based teams and for 1:1 student conferencing to support all learners effectively.

Next, readers can explore a compelling case study about how a network used a data protocol to help its leaders collaboratively analyze data and design actionable supports for schools in their network. The final case study describes how one school used a text-messaging intervention to ensure that all families were informed about their students' progress.

### RELATED AND SUPPORTING PRACTICES

Guiding Literacy Interventions Through Tiered Assessment

Strengthening Timely Interventions Through Goal Setting and Progress Monitoring

A Collaborative Approach to Student Work Analysis

Building School-Based Transition Teams to Accelerate Student Progress Toward Postsecondary Goals

Maximizing Student Progress Through Data-Informed Systems

### FURTHER READING

Multi-Tiered System of Support: Blueprint for MA
from the Massachusetts Department of Elementary and Secondary Education

# Appendix

## Notes

1 US Department of Education, “Focus on NAEP: Students With Disabilities”

2 Sanford et al, *Post-High School Outcomes*

3 Rangel-Pacheco and Witte, A Brief Review of MTSS Evaluation Measures

4 American Institutes for Research, “Special Education”

5 Vaughn and Fletcher, “Response to Intervention”

6 American Institutes for Research, “Secondary Schools”

7 American Institutes for Research, “Essential Components of MTSS”

8 Ibid.

9 American Institutes for Research. “What is Progress Monitoring?”

10 Rangel-Pacheco and Witte, *A Brief Review of MTSS Evaluation Measures*

11 McIntosh and Goodman, *Integrated Multi-tiered Systems of Support*

12 Ibid.

13 Ibid.

14 Giangreco and Suter, “Precarious or Purposeful?”

15 Mason et al., “From Professional Development to Implementation”; Minnesota Department of Education, “Using Multi-Tiered Systems of Support”

16 Ibid.

17 McIntosh and Goodman, *Integrated Multi-tiered Systems of Support*

18 Drury et al., “Educational Leaders Perspectives”

19 SWIFT Education Center, “Professional Learning Community”

20 McIntosh and Goodman, *Integrated Multi-tiered Systems of Support*

21 Gersten et al., “Mathematics Instruction”; McIntosh and Goodman, *Integrated Multi-tiered Systems of Support*

22 Drury et al., “Educational Leaders Perspectives”

23 Mason et al., “From Professional Development to Implementation”

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Marshall Street

# Literature Review

## NAVIGATING DATA FOR MULTI-TIERED SYSTEMS OF SUPPORT

A collection of research-to-impact practices developed with the Networked Improvement Community for Students with Disabilities

NAVIGATING DATA FOR MULTI-TIERED SYSTEMS OF SUPPORT

# Literature Review


## ABSTRACT

Multi-Tiered System of Support (MTSS) is a framework for schools and districts to address barriers to learning for students. This literature review synthesizes the existing research base on MTSS; namely what MTSS is, why it is important, the benefits and challenges of the framework, an overview of common implementation strategies, and what is currently known about the efficacy of MTSS. This review is designed for school district administrators considering adopting or improving MTSS practices at their district.


## Introduction

This literature review was written for an audience of educators, schools, and districts seeking to improve outcomes for secondary students with a focus on Black and Latinx students with disabilities living in poverty. In this literature review, we share a concise overview of MTSS, an adaptive organizing framework for data-informed academic and behavioral instruction and support that meets student needs in a timely manner. The purpose of this review is to equip district- and school-level staff who are considering adopting or improving MTSS practices with a summary of the research on MTSS so that staff can make informed, thoughtful implementation decisions for their districts. The literature review was conducted by Marshall Street, a coalition of educators working to systematically improve opportunities for students across the United States.

This literature review is part of a larger collection of improvement tools for districts. The Networked Improvement Community for Students with Disabilities (NIC), a group of 10 public charter school networks serving more than 75,000 students nationwide, launched in 2019 to make dramatic gains in the learning experiences, environments, and outcomes for Black and Latinx students with disabilities experiencing poverty. Led by Marshall Street at Summit Public Schools in partnership with technical assistance providers NIRN, RTI International, SRI International, and SWIFT Education Center, NIC participants used continuous improvement methods, supported by this literature review of leading

research and a corresponding toolkit of best practices, to improve implementation in these areas with the potential to increase academic outcomes for students with disabilities: Collaboration, Literacy, Multi-tiered Systems of Support, Transitions, and Emotional and Behavioral Supports.

This literature review provides a brief overview of the research regarding the following questions:

- **WHAT IS MTSS?**
- **WHY IS MTSS IMPORTANT?**
- **WHAT ARE THE BENEFITS OF MTSS?**
- **WHAT ARE THE LIMITATIONS OF MTSS?**
- **WHAT IS THE MOST COMMON FRAMEWORK(S) OF MTSS?**
- **HOW EFFECTIVE IS MTSS AND FOR WHOM?**
- **WHAT ARE THE NECESSARY CONDITIONS FOR SUCCESSFUL IMPLEMENTATION?**

# What is MTSS?

A Multi-Tiered System of Support is a framework for educators for organizing, aligning, and implementing a system of academic, behavioral, social-emotional learning, and mental health support for all students (California Department of Education, n.d.; Choi, McCart, and Sailor, “Achievement of Students With IEPs,” 2020; Colorado Department of Education 2017; Drury et al. 2021; Horner and Halle 2020; McCart and Miller 2020; McIntosh and Goodman 2016; Thurlow et al. 2020). MTSS not only integrates the service delivery of two existing support models — response-to-intervention (RTI) for academics and schoolwide positive behavioral intervention and support (PBIS) for behavior — but it also incorporates social-emotional learning and mental health support service delivery in order to increase the efficiency and efficacy of support (California Department of Education, n.d.; McCart and Miller 2020; McIntosh and Goodman 2016). The hallmarks of MTSS include multiple tiers of student support, high-quality instruction utilizing evidence-based practices, universal screening, decision guidelines, progress monitoring, collaborative teacher teams, and the use data for continuous improvement practices to improve implementation (McCart and Miller 2020; McIntosh and Goodman 2016; ESSA, Sec 8101(33) in Thurlow et al. 2020; McMaster and Wagner 2007 in Drury et al. 2021). MTSS is a prevention-based framework for systematically addressing barriers to learning in pursuit of improved academic and social outcomes for all learners (Averill and Rinaldi, n.d.; Drury et al. 2021; Horner and Halle 2020; Leonard, Coyne, Oldham, Burns, and Gillis 2019).

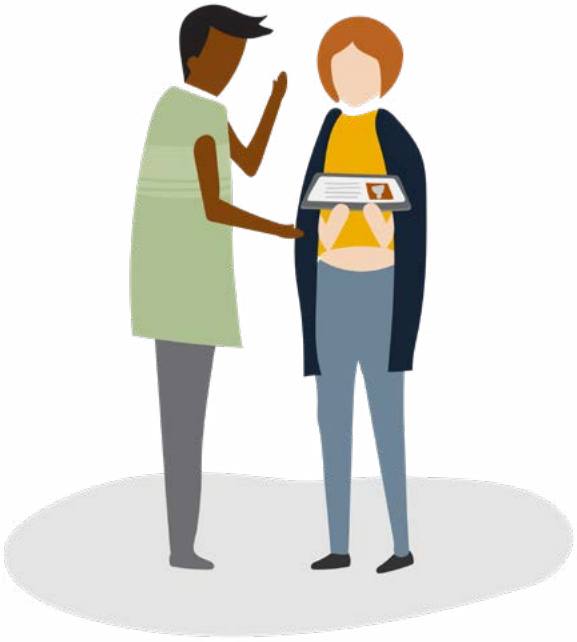
The multiple tiers offer differentiated and increasingly intensive support for academic, behavioral, and social learning (IRIS Center, n.d.). As McCart and Miller (2020, 4) state "MTSS is a comprehensive set of academic, behavioral, and social supports that rely on data to mobilize and coordinate diverse resources for students."

## Why is MTSS Important?

For decades, the public education system in the United States has struggled to effectively serve students with a diverse set of needs, particularly students with disabilities. Inclusive classrooms — that is, classrooms in which both students with and without disabilities are served together — are both an educational requirement and a best practice for serving students with disabilities due to governmental mandates such as No Child Left Behind (NCLB), the Individuals with Disabilities Education Act (IDEA), and the Every Student Succeeds Act (ESSA), as well as evidence-based research showing academic gains from such classrooms (Alnasser 2020; Brendle, Lock, and Piazza 2017; Cole et al., n.d.; Cramer et al. 2010; Weiss, Glaser, and Lloyd 2020). Yet, many schools struggle with the school-wide cultural shift that is required to actualize inclusive education (Sailor 2015).

MTSS is a leading strategy for advancing the school-wide cultural shift to inclusion through efficiently and equitably allocating resources to meet the needs of all students, including students with disabilities and traditionally marginalized students. Schools across the United States have embraced MTSS due to multiple factors:

- **The potential for all students to receive timely support for their unique student needs, including academic, behavioral, and social-emotional needs** (Gage et al. 2015; Nelson et al. 2004 in Scott et al. 2019; McIntosh and Goodman 2016; McCart and Miller 2020; Sailor 2015), **particularly those students who typically are not served well by the existing education system, including students with disabilities and students "who live in poverty, who experience high mobility, who benefit from an accelerated curriculum, or who struggle to learn for other reasons"** (Choi, McCart, and Sailor, "Reshaping Educational Systems," 2020, 8).
- **The potential to increase the efficiency of teachers by reducing the time it takes to regularly identify student needs and prepare individualized support for those needs** (Lane, Oakes, and Menzies 2019 in Choi, McCart, and Sailor, "Reshaping Educational Systems," 2020; McIntosh and Goodman 2016; McCart and Miller 2020; Sailor 2015).
- **The ability to use federal and local funds to implement MTSS activities via the Individuals with Disabilities Act and the Every Student Succeeds Act** (ESSA, Sec 2103(b)(3)(F) in Thurlow et al. 2020; IDEA 2004 in Drury et al. 2021; Sugai and Simonsen 2012).



Today, all 50 states have adopted some form of MTSS (Zhang et al. 2023).

# Benefits of MTSS

The literature surveyed cited the efficacy of MTSS on behavioral and academic outcomes (see Efficacy of MTSS and for Whom) and noted a number of additional benefits, which are outlined in the table below:

| BENEFIT | CITATION |
|---|---|
| Builds an organizational structure that provides a continuum of support for students | Averill and Rinaldi, n.d. |
| Promotes Local Educational Agency (LEA) participation in aligning and coordinating a spectrum of student support | California Department of Education, n.d. |
| Spurs system-wide shift to educational best practices | California Department of Education, n.d.; Lane, Oakes, and Menzies 2019 in Choi, McCart, and Sailor, "Reshaping Educational Systems," 2020; McCart and Miller 2020; Sailor 2015 |
| MTSS framework can be applied to many domains such as literacy, behavior, math, and resilience | McIntosh and Goodman 2016 |
| Enables integration of extra-academic systems-level evidence-based practices into the framework | **School-family partnerships:** Averill and Rinaldi, n.d.; McCart et al. 2009; Sullivan and Daily 2013 in McIntosh and Goodman 2016<br><br>**Wraparound and parenting supports:** Averill and Rinaldi, n.d.; Eber, Hyde, and Suter 2011 in McIntosh and Goodman 2016; Stormshak, Fosco, and Dishion 2010 in McIntosh and Goodman 2016<br><br>**Mental health supports:** Barrett, Eber, and Weist 2013 in McIntosh and Goodman 2016<br><br>**Drop-out prevention:** Legters and Balfanz 2010 in McIntosh and Goodman 2016 |
| Provides more sustainable, effective, and efficient delivery of services and support | Choi, McCart, and Sailor, "Reshaping Educational Systems," 2020; McIntosh and Goodman 2016 |
| Presents opportunity to reframe focus from the place where instruction occurs to the allocation of staff, supports, and services in an equitable manner | Choi, McCart, and Sailor, "Reshaping Educational Systems," 2020 |
| Provides more seamless support to students through combined academic and behavioral support system, reducing the number of students who "fall through the cracks" | McIntosh and Goodman 2016 |
| Reduces stigmatization of students with disabilities or otherwise marginalized students who receive additional support | Giangreco and Suter 2015 |

## Limitations of MTSS

No limitations to the MTSS framework were raised in the literature surveyed, however, multiple challenges to implementation were mentioned. Those challenges include:

- initiative change fatigue on the part of educators (McIntosh and Goodman 2016);
- lack of MTSS knowledge and training for teachers, administrators, and district staff (Drury et al. 2021);
- difficulties actually using data to inform tiered support (Drury et al. 2021; Leonard et al. 2019);
- lack of access to or funding for tools such as progress monitoring tools and aligned curriculum based on evidence-based practices (Mason et al. 2019; Minnesota Department of Education 2019);
- limited time for implementation of tiered support (Mason et al. 2019);
- difficulties serving students with the most significant cognitive disabilities (Thurlow et al. 2020); and
- lack of systems, structures, and policies (Drury et al. 2021; Leonard et al. 2019).

Because these challenges to implementation can forestall the adoption of MTSS in schools, the **Necessary Conditions for Implementation** section of this literature review examines them more thoroughly.

# Common Implementation Frameworks

The MTSS model is based on a public health approach to intervention (Brown-Chidsey and Bickford 2016 in Drury et al. 2021) and combines three, or sometimes more, tiers of student services:

- Universal Support / Tier 1: high-quality instruction and support available to all students,
- Additional Support / Tier 2: different instruction and support for students who need more in addition to Universal Support
- Intensified Support / Tier 3: instruction and support provided with variations in intensity (such as greater frequency and duration) in addition to Universal and Additional Supports

(Averill and Rinaldi, n.d.; Batsche et al. 2005 in Averill and Rinaldi, n.d.; Drury et al. 2021; Horner and Halle 2020; McIntosh and Goodman 2016; McCart and Miller 2020; Thurlow et al. 2020; National Center on Response to Intervention 2010 in Thurlow et al. 2020).

To support the appropriate use of services within the tiers, most MTSS models incorporate the elements of teaming structures, data for decision-making, evidence-based curriculum instruction and support materials, and continuous improvement processes (McCart and Miller 2020, 10). There are many names for the different elements used in the research including universal screening, progress monitoring, and problem-solving models (a term based on RTI practices) (Batsche et al. 2005; Drury et al. 2021; Fuchs and Fuchs 2006, Gresham 2007 in Averill and Rinaldi, n.d.; Horner and Halle 2020; Hughes and Dexter 2011 in Drury et al. 2021; Leonard et al. 2019; Mason et al. 2019; McIntosh and Goodman 2016).

A commonly used visual depiction of the tiers is a triangle, “representing levels of prevention (primary, secondary, or tertiary), types of support for students (universal, targeted, or intensive), curricula (core, strategic, individualized), or tiers of instruction (Tier 1, Tier 2, Tier 3)” (McIntosh and Goodman 2016, 13). Each layer is additive, meaning that all students receive Universal Support / Tier 1 services, some students will then receive Universal Support / Tier 1 and Additional Support / Tier 2 services, and few students

receive Universal Support / Tier 1, Additional Support / Tier 2, and Intensified Support / Tier 3 services (Averill and Rinaldi, n.d.; McCart and Miller 2020; McIntosh and Goodman 2016; Thurlow et al. 2020).

Common misperceptions of the tiers include the following:

- The perception that students need to move through all tiers in succession before receiving the level of service that they need (Fuchs et al. 2003 in McIntosh and Goodman 2016). Thurlow et al. (2020, 6) notes that no student should only receive Tier 3 support, as doing so would ignore the other instruction and support in Tiers 1 and 2.
- The perception that the tiers are only applicable to some domains, such as early literacy and behavior. In contrast, the tiers can be applied to nearly any topic in education (McIntosh and Goodman 2016).
- The perception that the tiers are a way to label students. In contrast, the tiers are used to describe supports that a student needs in the moment; the tiers are not a permanent descriptor of a student (McCart and Miller 2020; McIntosh and Goodman 2016).
- The perception that MTSS is only for some students, not all students. In contrast, MTSS is designed to provide services and resources to all students based on their needs (McCart and Miller 2020).
- The perception that Tier 3 is the "special education" tier. In contrast, this tier is for any student who needs intensive interventions in a particular domain (Thurlow et al. 2020).

## Efficacy of MTSS and for Whom

When viewed in sum, the literature on the effect of MTSS on academic outcomes shows varied results. Researchers typically attribute the variation in outcomes to the degree of fidelity of implementation (Coyne et al. 2016; Fuchs, Fuchs, and Malone 2017 in Coyne et al. 2018). Generally, researchers have found that MTSS, when implemented with fidelity, can have a positive impact on math performance and mixed results on reading performance (Gersten et al. 2009; Montague and Jitendra 2012 in Choi, McCart, and Sailor "Achievement of Students With IEPs," 2020; Choi et al. 2016; Choi, McCart, and Sailor, "Achievement of Students With IEPs," 2020; Scott et al. 2019). One study hypothesized that because the schools in their study had so many existing supports for reading, MTSS's ability to impact reading was limited as compared to math (Choi, McCart, and Sailor, "Achievement of Students With IEPs," 2020).

Recently, researchers have been able to more precisely measure the fidelity of MTSS implementation to draw more definitive conclusions on the efficacy of MTSS on academic performance. Scott et al. (2019) obtained fidelity measurements from 29 elementary, middle, and high schools in the United States over four years. They found that schools with higher MTSS fidelity in the reading domain were positively associated with more students at or above proficient in language mechanics and mathematics, but not in reading. Conversely, higher MTSS fidelity in the math domain was associated with more students at or above proficient in language mechanics, but not mathematics nor reading. Additionally, higher MTSS implementation fidelity in the behavioral domain resulted in significantly fewer suspension events, as compared to matched comparison schools (Scott et al. 2019, 308). As relates to the Networked Improvement Community's target population, schools with higher MTSS fidelity in this study had student demographics of 14% Black, 7% Latinx, and 63% free/reduced lunch status, though the study did not report on specific outcomes by sub-groups. The study also did not report the percentage of students with disabilities in the sample (310).

Choi, McCart, and Sailor ("Achievement of Students With IEPs," 2020) were also able to more precisely measure MTSS implementation in order to draw conclusions on academic performance. Their study examined impacts on academic performance specifically for students with disabilities (as measured by students with Individualized Education Plans (IEPs)) at 14 schools in the same large, urban school district serving students in Pre-K–5th grade and Pre-K–8th grade (3). Similar to Scott et al. (2019), this study found that students with disabilities in high-fidelity implementation schools showed increased math state assessment scores, as compared to comparison schools; however, reading score growth was equivalent to comparison schools (1, 6). The study did not report on race/ethnicity or socioeconomic demographics, nor on combined race/ethnicity, socioeconomic, and disability status.

Importantly, researchers in both of these studies noted the intensive support the sample schools received, including coaching and targeted technical assistance, in order to achieve high fidelity of implementation. Coyne et al. (2018, 15) observed that "there are many difficulties and challenges associated with implementing MTSS in schools under real-world conditions (Arden et al. 2017; Coyne et al. 2016)" and though sample schools may demonstrate consistent implementation as recommended by research, "that level of implementation may not mirror current practice in the field (Balu et al. 2015)," which can result in uneven academic performance.

Beyond academic scores, other academic- and behavior-related gains have been observed in schools implementing MTSS at varying levels of fidelity, including the results described in the table below.

| RESULTS | FOR WHOM | CITATION |
|---|---|---|
| Reduced gap between actual reading performance and grade-level standards for children at risk (e.g., the gap between kindergarten performance and 3rd grade standards) | For students in sample with disabilities, including students at risk | Simmons et al. 2008 in Choi, McCart, and Sailor, "Achievement of Students With IEPs," 2020 |
| Reduced identification rate of students with reading disabilities and increased passing rate on assessments | For students in sample with disabilities, including students at risk | Harn, Chard, and Kame'enui 2011 in Choi, McCart, and Sailor, "Achievement of Students With IEPs," 2020 |
| Increased time on tasks and academic outcomes through an integrated academic and behavioral MTSS framework | For students in sample with disabilities, including students at risk | Algozzine, et al. 2016; McIntosh et al. 2008 in Choi, McCart, and Sailor, "Achievement of Students With IEPs," 2020 |
| Significant improvement on ELA and Math scores | Students of color in elementary and middle schools in sample | Choi et al. 2022 |
| Improvement of academic performance and of educational equity (i.e., reduced impact of race, socioeconomic status, and gender), in schools implementing equity-based MTSS with high fidelity | Students in elementary and middle schools in sample | Choi et al. 2022 |
| Fewer suspension events | For all students in sample | Scott et al. 2019 |

# Necessary Conditions for Implementation

As MTSS is a schoolwide system of support and services for students, much of the research suggested addressing the implementation challenges and preparing for successful adoption by focusing on system-wide levers. As a brief review, the implementation challenges raised in the literature include the following:

- initiative change fatigue on the part of educators leading to a loss of enthusiasm and willingness to try new educational approaches (McIntosh and Goodman 2016);
- lack of MTSS knowledge and training for teachers, administrators, and district staff, particularly around data-driven problem-solving (Drury et al. 2021);
- lack of systems, structures, and policies that support MTSS implementation and remove barriers to implementation (Drury et al. 2021, Leonard et al. 2019);
- difficulties actually using the data that is collected to inform tiered support in a dynamic fashion (Drury et al. 2021, Leonard et al. 2019);
- lack of access to/funding for tools such as progress monitoring tools, and aligned curriculum and intervention programs based on evidence-based practices (Mason et al. 2019; Minnesota Department of Education 2019);
- limited time for implementation of tiered support, particularly Additional Support / Tier 2 and Intensified Support / Tier 3 (Mason et al. 2019); and
- difficulties serving students with the most significant cognitive disabilities (Thurlow et al. 2020).

Networks in the NIC that focused on improving MTSS implementation found that they needed to first find ways to create accessible data systems that would allow educators to understand and respond to the needs of all learners. Once that infrastructure was built, they could focus on training network and school leaders as well as educators in the new data tools.



The SWIFT Education Center (2024) identifies the system-wide levers as the MTSS framework, administrative leadership, integrated educational framework, family and community engagement, and inclusive policy structure and practice. A synthesized list of system-wide levers found in the literature are listed on the following page as necessary conditions.

| NECESSARY CONDITION | EXPLANATION |
|---|---|
| Build administrative leadership and support | The literature noted that administrators need to **build consensus to commit to implementing MTSS** (Batsche et al. 2005 and Castillo et al. 2010 in Averill and Rinaldi, n.d.); **build a shared vision and supportive data-driven problem-solving culture school-wide** (Batsche et al. 2005 and Castillo, et al. 2010 in Averill and Rinaldi, n.d.; Colorado Department of Education 2017); **cultivate their instructional leadership skills in MTSS** (Mellard, Prewett, and Deshler 2012 in Drury et al. 2021); **foster inclusive decision-making** (SWIFT Education Center 2024); and **deliver targeted professional development for staff** (SWIFT Education Center 2024). |
| Build a school-wide MTSS infrastructure | In collaboration with their districts, schools need to build a school-wide MTSS infrastructure (Batsche et al. 2005 and Castillo, et al. 2010 in Averill and Rinaldi, n.d.) that includes **data collection methods** (McIntosh and Goodman 2016); a variety of **collaborative teaming structures across systems** (general education, special education, administration, and school- and district-level support staff) (Averill and Rinaldi, n.d.; McIntosh and Goodman 2016) to **utilize the data for problem-solving** (Gersten et al. 2008; Sugai and Horner 2009 in McIntosh and Goodman 2016); **aligning and organizing the tiered support, including those for special education services** (SWIFT Education Center 2024; Thurlow et al. 2020); **incorporating aligned curriculum and intervention programs** based on Universal Design for Learning and other evidence-based practices (SWIFT Education Center 2024); and **building knowledge on continuous improvement cycles** (SWIFT Education Center 2021). |
| Integrate the school's resources and organizational structure | Integrating resources and organizational structures includes actions such as **acquiring assessment and intervention programs** (Mason et al. 2019; Minnesota Department of Education 2019), **redefining roles for paraeducators and specialists** (SWIFT Education Center 2024); **hiring and training MTSS coaches** (Coyne et al. 2018); **ensuring every student has a primary general education classroom placement** (SWIFT Education Center 2024); **scheduling appropriate time** in the school week for data analysis and problem-solving, planning, and implementing tiered support (Mason et al. 2019); ensuring the use of **language and practices that are based on service needs** as opposed to disability labels (SWIFT Education Center 2024) and creating a **positive school culture** where all students have access to extracurricular activities and all staff are contributing to student outcomes (SWIFT Education Center 2024). |
| Include families and community members as partners | MTSS is a whole school transformation that requires the partnership of families and community members. As part of the MTSS adoption process, schools and districts should **engage authentically with families for input and feedback** (SWIFT Education Center 2024), **provide opportunities for families and community members to participate in school** and the education of the students (Fan and Chen 2001 and Jeynes 2012 in Gross, Choi, and Francis 2018; SWIFT Education Center 2024) and **provide families with information needed to support their students** (Fan and Chen 2001 and Jeynes 2012 in Gross, Choi, and Francis 2018; SWIFT Education Center 2024). |

| | |
|---|---|
| Evaluate and adapt district policies and practices for MTSS | A variety of district changes are needed to support MTSS adoption and implementation. Those changes include **recalibrating district office roles** to cross-functionally support MTSS implementation (Averill and Rinaldi, n.d.), **building knowledge of district staff** (including the superintendent) in MTSS (Drury et al. 2021; SWIFT Education Center 2024), incorporating **opportunities for district staff to attend school-level meetings** (SWIFT Education Center 2024), building a **regular process for reviewing and revising policies** that impact MTSS implementation (SWIFT Education Center 2024), and **removing barriers to implementing MTSS** (SWIFT Education Center 2024). |

Schools and districts can use tools such as the Schoolwide Integrated Framework for Transformation Fidelity of Implementation Tool (Pollitt et al. 2019) or the Academic and Behavior Response to Intervention School Assessment (ASA) fidelity tool (Scott et al. 2019) to track their MTSS adoption progress.

Further, the literature noted that the order in which schools and districts implement the above system changes matters for successful MTSS adoption. A study by Choi et al. (2018, 10) found that administrative leadership played a critical role in school transformation and that "meaningful school-wide change might not occur without the mediation of high-quality school leadership." This suggests that schools and districts in early stages of adoption focus on first building administrative leadership in order to propel the other system changes.

# Conclusion

In conclusion, MTSS is truly a school-wide approach to meeting students' needs. When implemented with fidelity, MTSS can be an effective approach to meeting all students' needs, not just students with disabilities. For successful implementation, schools and districts must understand they are committing to a whole-school transformation and subsequently invest significant time to continuously align system-wide resources, professional development, policies, structures, and systems.

Schools implementing MTSS with high fidelity have seen strong gains in math and limited gains in reading for all students, in addition to reduced suspensions. For staff, high-fidelity implementation provides organizational clarity on educational practices and policies; accessible data systems; increased whole-school collaboration; and more sustainable, efficient, and effective implementation of student services. In short, MTSS is a framework for meeting student needs that, if implemented with high fidelity, has the potential to improve academic and behavioral outcomes for Black and Latinx students with disabilities experiencing poverty.

Best practices for implementing MTSS are discussed in ***Navigating Data for Multi-Tiered Systems of Support: Equity-based practices for using data at the district, school, and classroom levels***.

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Marshall Street

# Establishing Effective Data Routines in Site-Based Teams

**A RESEARCH-TO-IMPACT PRACTICE DEVELOPED WITH THE NETWORKED IMPROVEMENT COMMUNITY FOR STUDENTS WITH DISABILITIES**

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# Establishing Effective Data Routines in Site-Based Teams

**Implementation Level**

- [ ] District/Central Office
- [x] School
- [x] Program/Department
- [ ] Classroom

**Who Implements**

- [x] Teacher(s)
- [ ] Instructional Coach
- [x] Principal
- [ ] Central Office Leadership
- [ ] Specialist

## Practice Overview

### What is the Practice?

Site-based teams gather and use data to coordinate timely, targeted support for students across grade, department, or other site-level teams.



# Why are Site-Based Data Teams Important?

Structured meetings that focus on analyzing student data are necessary for educators to problem-solve how to best ensure all students receive the education they need. In many cases, schools already have student study team (SST) structures in place to address the needs of at-risk students through a multi-tiered system of supports (MTSS). These types of intervention team meetings help teachers implement high-quality instruction that focuses on the needs of all students, particularly Black and Latinx students with disabilities experiencing poverty. This high-quality instruction can reduce the need for more intensive intervention, allowing students with disabilities to remain in the general education classroom as much as possible.

Site-based data teams use a similar approach, but they look at data using different lenses, which are determined by the team's purpose.

## Why it Works

Site-based teams directly impact student learning experiences by ensuring that instruction is data-driven and based on individual student needs. They also work indirectly by strengthening educators' knowledge and capacity to address these needs. Teams of teachers collaborating create opportunities for peer learning among teachers to build collective expertise.[1] In particular, the diverse experience and knowledge of each member can be transferred to others as team members work together to address challenges. Teams that also adopt and implement a data-driven decision-making process can further increase teacher and school capacity and improve student achievement.[2]

Increasing teacher capacity through site-based teams is particularly important for students of color and students with disabilities who are more likely to be placed with the least skilled teachers.[3] Site-based teams can help less experienced teachers gain important pedagogical knowledge that will help them educate all learners.

Furthermore, site-based teams aid both newer and veteran teachers to grow their knowledge and capacity for making data-driven decisions about student needs and to reflect on their own practices. As a result, all students receive more targeted instruction, fewer students need additional intervention, and more students with disabilities can be educated within the general education classroom.[4]



Summit Atlas GLT reviews data during their weekly collaboration

# Implementation at a Glance

The information in this section provides a high-level view of what to consider when implementing this practice. Enabling Conditions describes the minimum conditions needed for successful implementation, including resources, mindsets, staffing, and recommended time allocation. Steps to Implement presents a concise checklist of action items, which are explained in detail in the following section.

## Enabling Conditions

| | |
|---|---|
| **Prerequisites** | • All school staff members understand the concepts of universal, additional, and intensified supports.<br>• Schoolwide norms guide how staff collaborate with one another in a manner that is supportive, respectful, and asset-based.<br>• Coaching structures exist to support educators in data analysis, planning of action steps, and the implementation of strategies to meet all students' needs. |
| **Recommended Materials** | • Team meeting agenda or protocol<br>• Data tool (e.g., grading systems, databases that can disaggregate demographics, attendance systems) that allows for disaggregation of all identified data points<br>• Resources for helping teachers and teams choose strategies for accelerating learning |
| **Staff Commitment** | • Dedicated team lead to manage meeting agendas, oversee documentation of meetings, and follow up on action items (e.g., school leader, department chair)<br>• Dedicated team of staff members to regularly engage in site-based team meetings<br>• Dedicated network data-support personnel to troubleshoot data or data tools with team members |
| **Recommended Tme Allocation** | • School leadership<br>– 2 hours per week for their own data analysis and preparation to support team meetings<br>– Individual data coaching meetings (45–60 min. per week per team)<br>• Team members<br>– Weekly team meeting (45–60 min. per week)<br>• Data support<br>– 1 hour per week to fix issues and update any data |

# Steps to Implement

### LAY THE GROUNDWORK FOR SITE-BASED DATA TEAMS

To begin, **school leaders will:**

- ☐ Define team purpose
- ☐ Determine team members
- ☐ Train team members on data analysis
- ☐ Develop meeting resources

### PREPARE FOR TEAM MEETINGS

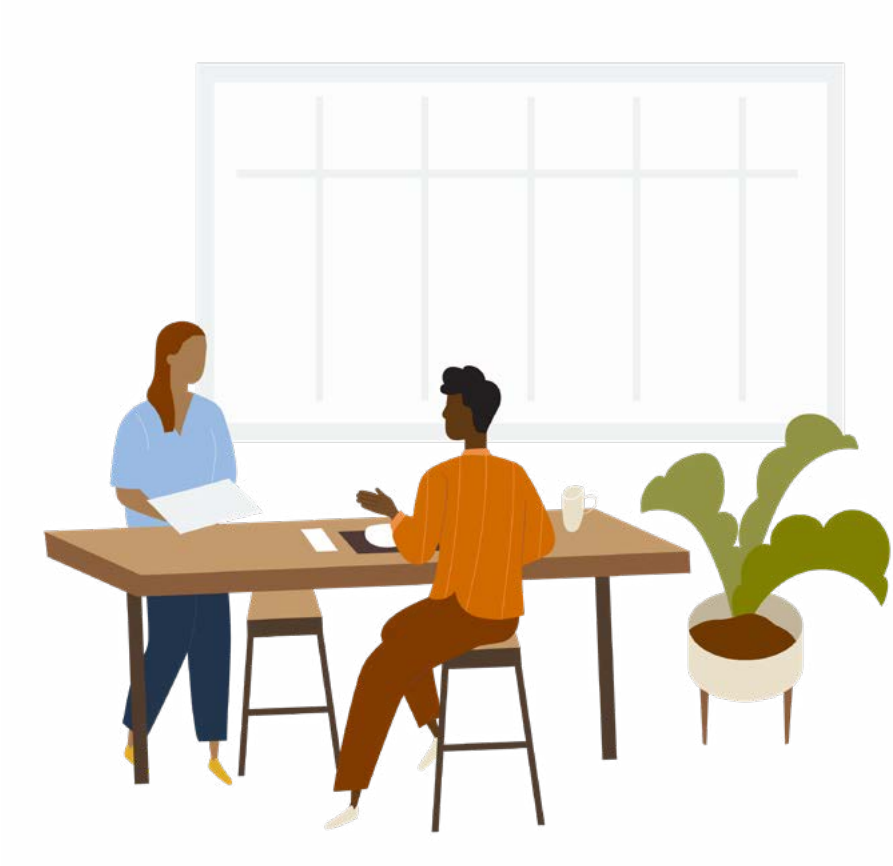
To prepare, **teams will:**

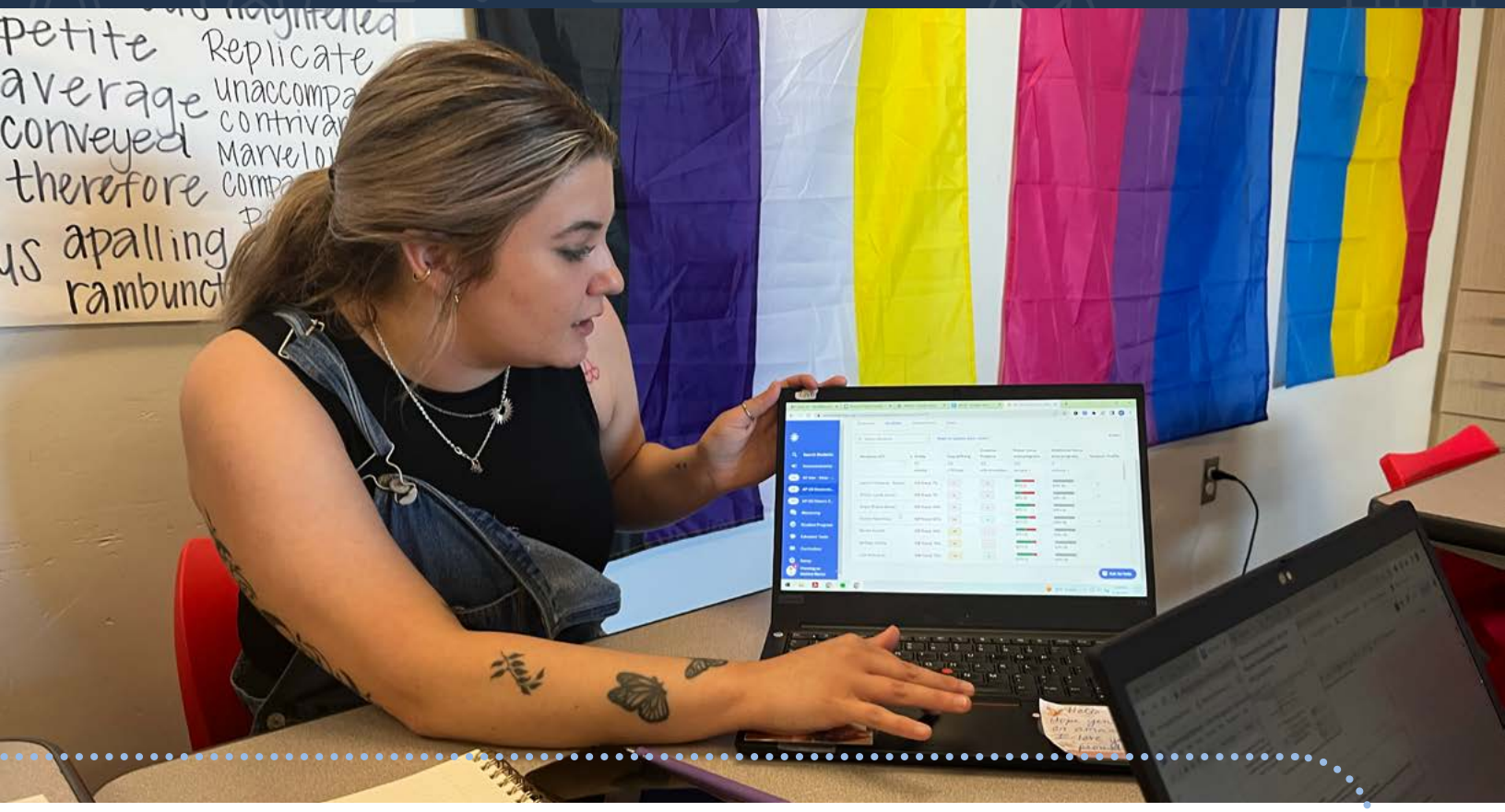
- ☐ Identify the data for analysis
- ☐ Establish team norms

### LAUNCH TEAM MEETINGS

To implement the practice, **teams will:**

- ☐ Complete pre-work
- ☐ Hold meetings
- ☐ Enact plans and follow up






# Bringing this Practice to Life

## GRADE-LEVEL TEAMS USE DATA TO DESIGN ACCELERATION OPPORTUNITIES

*It can be challenging in the secondary context to find opportunities to intervene and re-teach content to small groups of students. To meet the challenge, Summit Atlas created a weekly student support block dedicated to targeted instructional grouping to ensure students gain skills they have not yet mastered in class. To use this time most effectively, Summit Atlas staff need to use data to target the courses, content, and skills that will benefit students the most.*

### Understanding the Challenge

During the period of remote learning caused by the COVID-19 pandemic, Summit Atlas struggled to help students not yet mastering **cognitive skills**, a set of learning outcomes for Summit Public Schools graduates. At the heart of the struggle was the difficulty of providing "just-in-time" support to the students experiencing barriers with remote learning. Atlas's teachers had trouble knowing what the students' needs were and finding time in the daily schedule to address those needs. To make that time available, Atlas created a block each week (based on a structure developed at the

Summit Public Schools network-level) during which students could get more targeted support on challenging assignments or topics. To provide effective support during these acceleration blocks, Atlas needed a way for teachers to quickly identify student needs and to coordinate, school-wide, which teacher could provide the necessary support. Atlas leadership determined that existing grade-level teams were an asset that could be leveraged to solve this problem. Their grade-level teams — 9th–10th and 11th–12th — included content teachers, as well as grade-level special educators, a school leader, and other relevant staff (e.g., teaching assistants, therapists, counselors). Together, this team could collaboratively review data and plan responsive actions for students.

## Transitioning from Virtual to In-Person Norms

During COVID virtual school, solving for "where" acceleration blocks would meet proved relatively easy. Staff sent students Zoom links that students could use to meet, with little delay, the teachers they needed support from. However, when Summit Atlas returned to an in-person school setting, it became more challenging to solve for "where."

To tackle this issue, Summit Atlas Director of Learning Experience Kristina Brawley and Summit Atlas Principal Dan Effland reflected on their success in virtual school and wondered if they could apply a similar approach in the school building. In the physical space, they would need to communicate to students further in advance because the rooms for acceleration blocks would change, and unlike virtual school, a simple click would not lead them to the correct teacher. Additionally, as with any changes to physical space, school culture needed to be of foremost concern for implementation. While Kristina proposed changing class lists for acceleration blocks on a daily basis to maximize the "just-in-time" learning, Dan suggested making these changes once every two weeks to minimize disruptions that could negatively impact school culture. Ultimately, they agreed to start with once-a-week roster changes for acceleration blocks, in an effort to both rapidly meet student needs and minimize disruptions to school culture.

## Building a Tool to Support Rostering

To facilitate the grade-level team members' rostering of students into classes based on data, Kristina connected with Linh Hoang, data lead at Summit Public Schools, for help in building a scheduling support tool. Kristina and Linh began meeting on a weekly basis to clarify the tool's requirements and how teachers would need to use it. Kristina communicated specifically what data she needed to see, why she needed to see it, and how it would help to improve student outcomes and efficiencies for teachers. Following their meetings, Linh iterated on the scheduling tool to support those exact needs. In time, the scheduling tool developed into an early version of the acceleration block planning tool that became a lynchpin of the grade-level team meeting.

## IMPROVING THE PRACTICE BY BUILDING DATA ANALYSIS SKILLS

While supporting grade-level teams in rostering students weekly, Dan and Kristina noticed that teachers were strong in considering the "who" of their acceleration blocks, but they were not yet as strong in the "what" and "how" aspects of the steps needed to plan blocks. Their teachers needed more support in analyzing student progress data to understand student needs and how to respond to them.

Inspiration for building data analysis skills in teachers struck after Dan participated in a network-wide data protocol during a meeting of all Summit principals. At the meeting, the principals used a protocol that involved analyzing data, setting a goal for a priority metric, identifying actions to move toward that goal, and receiving feedback from peer principals. Dan recognized this protocol was a modified version of a Plan-Do-Study-Act cycle to meet stated goals and could also benefit his teachers' development of their data analysis skills.

After the principals' meeting, Dan suggested creating a grade-level team meeting protocol: first have teachers use a similar simplified goal-action-feedback protocol, and only then have grade-level teams determine how to roster students into classrooms.

Today, the weekly grade-level team meeting protocol looks like this:

| | |
|---|---|
| 10 min. | The learning specialist shares updates about students for the week. |
| 10 min. | Teachers identify student needs and make a plan to meet the needs:<br>1. Teachers use student progress data to identify the student needs that will make the biggest impact.<br>2. Teachers make a plan to address the need within the following week.<br>3. Teachers set a goal for improved student performance.<br>4. Teachers give one another feedback on their plans. |
| 25 min. or less | Teachers roster students in acceleration blocks, according to the intervention plans. If more than one teacher adds a student to their roster, the team discusses prioritization of needs to determine the optimal class for the student to join. |

| | A | B | C | G | H | I | L | M | N | O | P |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | USE PLUS SIGN (+) ABOVE COLUMNS TO EXPAND FOR MORE DETAIL | | | | | | | | | | |
| 3 | Grade | Student Name | Mentor | LC Schedule | Is MLL? | MLL Teacher | Gender | Race | Assignment | Teacher/Room | Mon, 11/6 |
| 4 | 9 | [redacted] | J Barco | | ☐ | | M | Black or African American | Outside- Meet in OLS1 | | |
| 5 | 9 | | J Barco | | ☐ | | X | White | Yoga | | |
| 6 | 9 | | J Barco | | ☐ | | M | Hispanic | Outside- Meet in OLS1 | | |
| 7 | 9 | | J Barco | | ☐ | | M | White | Outside- Meet in OLS1 | | |
| 8 | 9 | | J Barco | | ☐ | | M | Black or African American | Grayson Support | | |
| 9 | 9 | | J Barco | | ☐ | | M | Two or More Races | Outside- Meet in OLS1 | | |
| 10 | 9 | | J Barco | | ☐ | | F | Two or More Races | Outside- Meet in OLS1 | | |
| 11 | 9 | | J Barco | | ☐ | | M | White | Allen Support | | |
| 12 | 9 | | J Barco | | ☐ | | F | Black or African American | Allen Support | | |
| 13 | | | | | ☐ | | | | Grayson Support | | |
| 14 | 9 | | J Barco | | ☑ | | F | Black or African American | Earl Support | | |
| 15 | 9 | | J Barco | | ☑ | Brittany Allen | F | Black or African American | Allen Support | | |
| 16 | 9 | | J Barco | | ☐ | | F | White | Outside- Meet in OLS1 | | |
| 17 | 9 | | J Barco | | ☐ | | M | White | Game Room OLS2 | | |

*Example of Summit Atlas' rostering tool used to determine for which class students will attend acceleration blocks.*

### MAKING COLLABORATIVE DECISIONS

**Summit Atlas** grade-level teams often have to negotiate where a student will receive the most benefit during their acceleration blocks when they need intervention in more than one class. In these cases, teachers balance students' multiple needs with other factors, such as:

- content prioritization (e.g., distance from mastery, current grade, value of assignments),
- relationships with teachers,
- other services students are entitled to in their IEPs, and
- student interest in the subject.

Atlas school leaders give teams the autonomy to make these decisions using data and provide additional support when needed.

## Acceleration Blocks in Action

Every Monday morning, students receive an email from the scheduling tool that tells them which class to attend for their weekly acceleration block. Teachers then enact the plans they created for the "who" (students they're focusing on), the "what" (the way students will show mastery), and the "how" (the strategies teachers proposed to their grade-level team and received feedback on).



# How to Implement this Practice

The steps below provide step-by-step guidance for implementation of site-based teams specific to school and community context, along with accompanying resources to get started.

## Lay the Groundwork for Site-Based Data Teams

### Step 1: Define Team Purpose

School leaders and leadership teams should have a clear vision for why a team of educators is meeting. Various site-based teams will have different purposes based on the group of students they are focusing on and the problem they are trying to solve. The team's goal needs to be clear and within the team's locus of control.

The table below presents examples of possible team structures and purposes:

| Team | Purpose |
|---|---|
| Grade-Level | Foster collaboration among educators within the same grade, allowing them to share insights, discuss student progress, plan across subjects, address challenges, and coordinate efforts to ensure a cohesive and supportive learning environment for students within that grade level. These meetings serve as a platform for effective communication, data analysis, and collaborative decision-making to enhance the overall educational experience for students in that specific grade. |
| Departmental | Collaboratively address curricular concerns within the content area, particularly as it relates to vertical alignment across grade-levels. These meetings could also be used to discuss types of accommodations, modifications, or interventions that pertain to the subject area. |
| Intervention | Analyze student data to identify individual students who need more intensive levels of intervention in or outside of their classes. This team will also monitor data for students who receive these interventions to determine whether interventions are working effectively, new interventions are needed, or additional support may be needed from special education. |

### Step 2: Determine Team Members

The choice of team members should align with the purpose of the team. Ideally, teams consist of individuals with varied viewpoints on the same issue or group of students. By leveraging diverse perspectives in any team, schools can more holistically and effectively address student needs. For grade-level teams, this might include a school counselor or special educator who works with that grade level.

When choosing team members, consider the following factors:

- Diversity of perspectives and roles
- Time availability
- Leadership or decision-making ability
- People from whom getting buy-in is helpful

It is important that teams define roles and responsibilities for team members. Teams need a clearly defined leader, even if that role rotates among members. The table below provides examples of team structures and recommended members to include in each:

### Including Diverse Roles to Create Effective Teams

At **Mastery Schools**' Simon Gratz High School, staff members work in teams to help seniors with their postsecondary plans and goals. Team members in a variety of roles — including social workers, special education transition team members, senior seminar teachers, and college and career advisors — work with seniors on their journey toward postsecondary life. The diverse perspectives in these meetings help the Gratz team consider and plan for all aspects of students' postsecondary needs. See ***Building School-Based Transition Teams to Accelerate Student Progress Toward Postsecondary Goals***.

| Team | Members |
|---|---|
| Grade-Level | Made up of all staff members who work directly with students in a specific grade level. Most, if not all, teachers in this team will see each student in one academic class, but the team may include special educators who teach students in that grade-level, as well as other support providers. |
| Departmental | Made up of all teachers and content specialists who relate to a specific content area, regardless of grade level. May include interventionists, coaches, or special educators who support the content area team. |
| Intervention | This team should include a diverse set of staff members, including general educators, special educators, mental health providers, counselors, school administrators, school psychologists, and other specialists. Families can also be included in an intervention team. |

## Step 3: Train Team Members on Data Analysis

Using summer or beginning-of-year training to build necessary mindsets related to data analysis and the purpose of the team will help create the foundation for the team throughout the year. Professional development throughout the school year can then build team members' common understanding, language, and capacity for data analysis. Both alignment of staff mindsets and technical training will help ensure consistency across the team regardless of each member's role.

Consider creating a scope and sequence for the year that covers all the technical skills team members will need and also provides the chance to recalibrate around mindsets. A scope and sequence might include the following:

- A step-by-step process for how to make meaning of the data that will be analyzed in the meetings
- A process for analyzing and interpreting disaggregated data by subgroups (The process of analyzing all students as well as subgroups should be specific to the purpose of the meeting.)
- An introduction to any data tools, such as student information systems, analysis tools, or data visualizations, that will be used during the meeting
- Practice using tools and applying them to an actual meeting (Part of this practice should also include how to make meaning of data and trends.)

### Strategic Planning: Purpose Driven Decision-Making

**Summit Atlas** grade-level teams meet weekly to determine specific student needs for intervention or acceleration based on progress data. During this collaboration, they aim to share insights on their student data and discuss how best to balance students' various academic needs across content areas during the school's acceleration block. The clear purpose of this meeting makes it easier for teachers to use the appropriate lens when analyzing data, as well as to make the best decisions based on that data.

## Step 4: Develop Meeting Resources

### PROTOCOL

Draft a team data protocol aligned to the purpose and vision of the team that allows for a one-hour meeting. The protocol needs to ensure that all team members do at least the following:

1. **Review relevant data.** Look for patterns, trends, and outliers.
2. Pay special attention to **subgroups and equity.**
3. **Make sense of the data.** Try to understand why the data look the way they do.
4. Plan for **how to respond to the data**, answering the questions:
   - What will be done?
   - Which students need support?
   - Who will take the action?
   - Where and when will this happen?
   - How will you know if it worked?
5. **Give and get feedback** from another teammate or the whole team.

The protocol should take into account the amount of support team members will need with data analysis and problem-solving, both individually and as a group. Some teams might develop a protocol in which teachers make sense of their data individually and then come together as a group for problem-solving.

### ACTION STEPS BANK

School leaders will need to create a resource of different action steps or interventions that team members can choose from when developing a plan for how to respond to their data. Action steps should be feasible, timely, and in the teacher or team's locus of control. It is a good idea to start a basic prepopulated list based on research. The team can expand the list over time as they brainstorm new ideas during team meetings. Teams can also add to their bank of action steps information on how students have responded to the actions or how easy they were to implement with fidelity. Over time, team members will see how different interventions work for different students and for the varied needs of those students, giving them the self-efficacy and empowerment to keep trying new options when prior strategies have not worked.

# Prepare for Team Meetings

## Step 5: Identify the Data for Analysis

The team itself must determine what data is most applicable for the team to analyze based on its purpose and goals. This determination should balance team objectives with school and network priorities in order for it to be as useful as possible. While schools and networks may prioritize outcomes such as test scores or class grades, teams can choose data that is more connected to daily instruction. Changes will be more apparent in these more proximal measures than in less frequently collected measures (e.g., summative assessments, state standardized assessments).

The figure below shows examples of how data used by a school-level team can be aligned with school or network outcomes of interest.

| SCHOOL/NETWORK PRIORITIES | SCHOOL-TEAM PRIORITIES |
|---|---|
| State assessments → | Unit assessments |
| GPA → | Assignment grades |
| Graduation rates → | Passing grades |
| Suspensions → | Referrals |

## Step 6: Establish Team Norms

Before launching meetings, site-based teams benefit from agreement on team norms. When establishing norms, important factors to consider include the following:

- Expectations for how interventions are implemented
- Data entry requirements prior to and for meetings
- Meeting protocol
- Completion of necessary pre-work
- Materials needed (e.g., laptops, exit tickets, grade books)
- Beliefs about sharing each member's unique expertise
- Collaboration for the best results for students

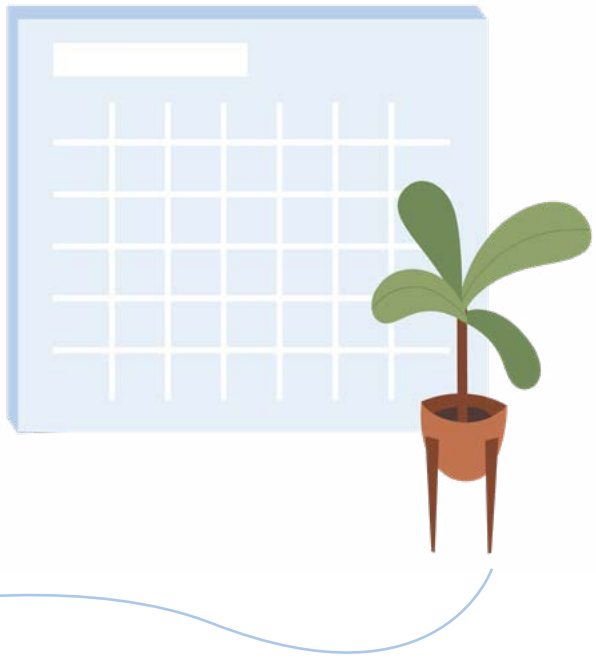
### Aligning Data Across the School

Misaligned data will, over time, erode buy-in from team members. Early on, **Summit Atlas** school leaders aligned intentionally on how they talked about data analysis and subsequent placement of students in interventions to address the needs of all students. They created a leadership team around their new grade-level meetings that included teachers who were less accepting of the school's acceleration blocks so that they could build the capacity of team members and, over time, shift the mindset of teachers to adopt the practice.

When team members are able to express expectations and agree to norms that everyone will hold, frustrations and disagreements are less likely to occur in the future. In the process of agreeing to norms, teams can modify the protocol that was created in Step 4, which will help build buy-in from team members. Regardless, the team will benefit from having common expectations that members hold one another accountable for, such as that grades will be updated by the end of every Friday or that intervention activities will not be the same as the original assignment.

### Create a Schedule that Works for Everyone

Scheduling team meetings may seem obvious, but it can often pose an unexpected challenge. It is important to try to reduce all possible conflicts for team members. For instance, consider how to schedule meetings so that special educators who support students in multiple subjects can attend each content-area meeting and not end up double-booked. This is made easier when school leaders, leadership teams, and site-based teams collaborate on the scheduling systems to ensure that all necessary members can attend meetings. To reduce potential conflicts, schools can use a shared school-wide calendar to schedule meetings so that all staff members can see when various team meetings are held.



# Launch Team Meetings

## Step 7: Complete Pre-work

Pre-work should be in service of making meetings more efficient when time is limited. If team members do not believe this to be true, they are unlikely to complete pre-work. Possible pre-work from members can include:

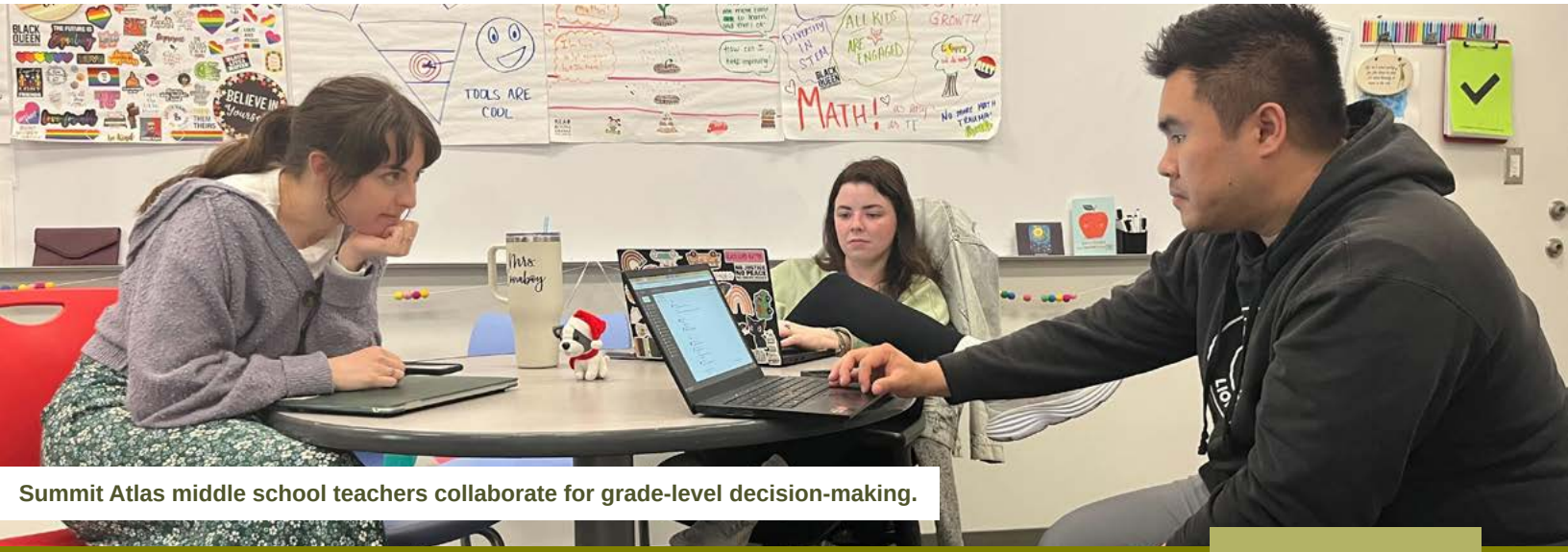
- grading exit tickets,
- inputting data,
- reading,
- completing prior action items,
- looking for classroom trends in the data, or
- researching potential interventions.

## Step 8: Hold Meetings

At the end of the meeting, make sure there are clear action items with defined deadlines. Just like pre-work, action items should be relevant to the work discussed in the current meeting, and should be returned to in the next. Without transparency and follow-up on action items, team members will not feel accountable to one another.

Action items can include:

- checking in with a student,
- researching on possible interventions that can be added to the team's intervention bank,
- connecting with an outside organization,
- scheduling a follow-up meeting,
- implementing interventions,
- creating needed materials, or
- emailing staff.




**Summit Atlas middle school teachers collaborate for grade-level decision-making.**

### WHAT DO SITE-BASED DATA TEAM MEETINGS LOOK LIKE?

The following example illustrates what a site-based data team meeting can look like. Some teams will have team members create their own individual goals and/or create team-wide goals that all members work toward. Consider what both the team and the students might benefit from most.

| | |
|---|---|
| **Step 1** (Independent) → | Find trends in the current data. |
| **Step 2** (Independent) → | Develop a strategy to impact that student data in the next week (e.g., small group instruction, study guides, scaffolded practice). |
| **Step 3** (Independent) → | Identify a goal for what the data will look like next week. |
| **Step 4** (Whole-team) → | Share findings, plan, and goal from steps 1–3. Give teammates feedback. |
| **Step 5** (Whole-team) → | Go through the process of placing students into intervention classes. |

## Step 9: Enact Plans and Follow Up

The most difficult step in the process for site-based teams is implementing the action steps determined in the meeting. This step requires team members to enact plans with fidelity and quality so that the data eventually shows improvement as a result. Furthermore, some plans may not work, for a variety of reasons, forcing the team to reconsider the chosen actions. And while the team needs to hold its members accountable for enacting the plan, there should be a considerable amount of grace given when a plan does not work out. Providing this courtesy helps all members feel like they can continue to innovate and persevere. A certain amount of failure has to be tolerated — even celebrated — before trying the next possible strategy for responding to data.



# Practice Snapshot

## COLLEGIATE LEADER DATA MEETINGS

***How can a school foster collaboration between special and general educators to enhance learning outcomes for students with disabilities?***

*One promising approach is an emerging practice called "data teaming." Data teaming involves regular meetings among school stakeholders to collectively analyze student needs and develop intervention strategies. This collaborative process can effectively break down silos and create a more inclusive and effective learning environment for all students.*

*During the 2022–23 school year, Rosenwald Collegiate Academy (RCA), a Collegiate Academies public charter high school in New Orleans, implemented data teaming after noticing a troubling trend: Special education teachers weren't seeing the impact of specialized instruction without teaming and alignment from general education teachers, while general education teachers struggled to provide differentiation and re-teaching to support students with disabilities. As a result, both general education students and students with disabilities were struggling to achieve content mastery.*

### The Journey

Sonia Scott, the director of special education, and Samara Levy, the director of academics, had been seeking new ways to improve content mastery for their students with disabilities.

Although RCA had implemented co-teaching—a collaborative teaching structure aimed at enhancing teachers' ability to provide coordinated and individualized student support—it did not produce the desired learning outcomes the school had anticipated, especially for students with

disabilities. Sonia and Samara noticed that co-teachers tended to stick to a single co-teaching model, even when a different type of co-teaching model might be more suitable for meeting students' needs. Moreover, they observed that communication between general education and special education teachers was challenging, partly due to conflicting meeting times. Although both groups met separately with Sonia and Samara on a weekly basis, they did not have consistent joint meetings. This lack of collaboration compounded the issues they faced.

After reflecting on the school's co-teaching history and efforts, Sonia and Samara formulated a new hypothesis. They believed that implementing a school-wide practice of utilizing student progress data to identify academic needs, selecting suitable co-teaching models, and fostering information-sharing between general and special educators would enhance the co-teaching process and, in turn, lead to improved learning outcomes, especially for students with disabilities.

## Setting Enabling Meeting Structures

First, Sonia and Samara changed the school's faculty meeting infrastructure. Historically, Sonia and Samara had met weekly with one another to understand student needs and then would meet separately once a week with general education and special education teachers.

However, to better facilitate information sharing, Sonia and Samara changed their meeting approach.

- First, Sonia and Samara would continue to meet weekly, often three times a week, to align on student needs.
- Then, Sonia and Samara would systematically bring instructional coaching teams to observe classes and review data. Instructional coaches met with the co-teaching pairs biweekly to review the data, create re-assessment calendars, and discuss and practice re-teach plans.
- Next, Sonia and Samara would bring together the entire school-wide faculty to collaboratively share student information, understand student needs, and align on interventions.

## Developing Data Protocols

With the new meeting structure in place, Sonia and Samara set out to determine how to best incorporate the use of data in their school-wide faculty meetings. They developed a data protocol that educators could follow each week based on an existing protocol, aiming to establish a consistent practice of using data to inform their intervention planning.

To supplement the data protocol, Sonia and Samara worked closely with Aidan Kelly, Collegiate's chief academic officer, to

**RCA'S DATA PROTOCOL**

- Celebrate and discuss noteworthy academic highlights.
- Review all student data — such as assessment results, attendance, and behavior data, via a comprehensive data collection tool — to identify student needs.
- Collaboratively develop action steps to meet student needs, such as learning strategies, interventions, and resources.

incorporate the use of a comprehensive data collection tool built specifically for Collegiate's school network. The tool incorporates various data points, such as assessment results, attendance records, and behavior data for individual students. "We dedicated ourselves to improving data communication," shared Aidan. "Through trial and error, we discovered the most effective method of conveying information: a graph with specific numbers, represented by red or green indicators. This approach is instrumental in presenting the essential insights to leaders at [a particular] level."

## Introducing the Practice to Faculty

To introduce the new data teaming protocol and meeting structure, Sonia and Samara brought together their full faculty.

- First, Sonia and Samara began by clearly communicating the reasons behind the changes with teachers and staff. Specifically, they underscored Collegiate's mission and values, emphasizing the importance of supporting all students.
- Next, Sonia and Samara reminded teachers and staff about the shared goal of planning student interventions with intentionality and using data to drive instructional decisions effectively.
- Then, Sonia and Samara spoke about their shared desire to help students see the connection in learning across all classes in order to improve student investment. For example, RCA wanted students to experience how concepts learned in algebra are relevant and applicable in science class, as well as other disciplines.
- Finally, Sonia and Samara shared their hypothesis: by fostering increased collaboration among RCA's teachers and staff, they believed they could collectively fulfill Collegiate's mission, provide effective support to all students, and strengthen students' understanding of the interconnectedness of learning across various subjects.

RCA's teacher response was positive. The teachers were willing to try the new data teaming approach and actively contributed their insights and suggestions on how to establish even more effective systems and structures to bolster student achievement.

## Implementing the Practice

After introducing the new data teaming protocol and meeting structure with the full staff, Sonia, Samara, and the school started implementing.

- Once a week, Sonia and Samara met together to review student data and design school-wide action steps using the data collection tool and data protocol.
- After the 1:1, Sonia and Samara gathered their instructional coaches and school leaders to use the data protocol and data to engage in collaborative decision-making. Together, the instructional team leveraged their collective knowledge about the student, special education best practices, and general education best practices to more deeply understand the student data and to design interventions.

- This meeting helped instructional coaches go into **coaching meetings** with a clear understanding of student needs from both the special and general education perspectives. The instructional coaches distribute the data and share aligned action steps with teachers, who then further break down the student data and contribute their own perspectives on student needs and highest-leverage interventions.
- Completing the data teaming cycle, teachers take the data and action steps to their classrooms. Teachers break down student data, including attendance, behavior, and GPAs, with their students. Further, classroom-level student data is posted around campus, and teachers engage in conversation about individual student data with students and their parents.

## Making Improvements to the Practice

Initially meeting once a week 1:1 as directors, Sonia and Samara noticed that they still needed to have multiple informal 1:1 check-ins beyond the once-a-week meeting. Realizing the benefits of the more frequent check-ins, Sonia and Samara adjusted their practice in the second semester. From the first semester to the second semester, Sonia and Samara increased their 1:1 meetings to three times a week, comprising two 75-minute sessions and a brief 10-minute huddle.

Reflecting on their changed approach, Sonia noted, “This semester we approached it completely differently. At the last minute last semester, we were making sure to get students to master standards. This semester, we are making sure that we are monitoring the progress of data together. Now, we are already meeting student learning goals at the beginning of the semester.”

## The Results

At the end of the school year 2022–23, **92% of RCA’s students with disabilities achieved Mastery on their LEAP and/or April Dunn projects, up from 44% at the end of the school year 2020–21.**

Moreover, data teaming has had a significant positive effect on RCA’s school culture. By involving all instructional leaders and teachers in the process, RCA created an environment that fostered collaboration, innovation, and a shared sense of responsibility for student success. Sonia reflected on the importance that data teaming had in improving collaboration, sharing: “Collaboration was a new system and structure that came from this teaming structure. We had different teachers collaborating with one another to support in areas where we knew we needed the most support. Our teaming structure brought together ownership and teamwork.”

# Summary

Site-based teams have the potential to provide proactive support to educator teams, programs, or entire schools by using data to identify issues and develop action steps. Teams should be intentional about the data and action steps they take to ease the burden for others and function as a support system based on the level of needs identified in the data. This can help ensure that students, especially those with disabilities who are Latinx, Black, or living in poverty, are able to receive the appropriate amount of academic support to make progress. To do this, formal structures and strong data that support decision-making are essential for the team's activities to be effective and centered on improving outcomes for students. Including diverse team members in these processes helps educational systems stay aligned in their school culture and actions to improve outcomes for all students. When diverse teams work together with the same purpose, they can strategically use their collective expertise to best support student learning and outcomes.

FURTHER LEARNING

**Collaborative Teams Toolkit**

STATE OF NEW JERSEY DEPARTMENT OF EDUCATION

**Team Formation Form**

SWIFT EDUCATION CENTER



ESTABLISHING EFFECTIVE DATA ROUTINES IN SITE-BASED TEAMS

# Appendix

# Appendix

## How to Measure

When making use of site-based teams' data routines for instructional support, monitoring how useful, usable, and utilized the practice is by team members and across the school system can accelerate learning to improve outcomes for students. Be aware that improvement in process measures is usually necessary to ensure a high enough level of fidelity for outcomes to see improvement. At minimum, these measures are most essential:

| PRIMARY MEASURES | | | | | |
|---|---|---|---|---|---|
| **Measure Type** | **Data Collection Type** | **Question Asked** | **Results** | **What does success look like?** | **Examples and Notes** |
| Process | Meeting notes | Is the team meeting as scheduled?<br>Yes / No | Percent of scheduled meetings held | Increasing percent of scheduled meetings held until reaching 100% | Could measure this both per team and school-wide |
| Process | Meeting notes<br>Observation | Is the team correctly using the meeting protocol?<br>Yes / No | Percent of held meetings in which the protocol is used correctly | Increasing percent of meetings where the protocol was used correctly until reaching 100% | Consider noting the sections of the protocol that are skipped or not addressed correctly to see patterns. |
| Process | Lesson plans<br>Observation<br>Meeting notes | Are action plans implemented as designed?<br>Yes / No | Percent of action plans implemented as designed | Increasing percent of action plans implemented until 100% | Note any barriers to implementation or adaptations made over time. |
| Outcome | Grade books | Are student grades improving?<br>Yes / No | Percent of students who improved their grades | Increasing percent of students showing improved grades over time | The data analyzed to see positive effects should align with what is used during meetings. |

Additional measures can guide a team to know whether the routine data protocol is leading to the desired improvements for students:

| SECONDARY MEASURES | | | | | |
|---|---|---|---|---|---|
| **Measure Type** | **Data Collection Type** | **Question Asked** | **Results** | **What does success look like?** | **Examples and Notes** |
| Process | Meeting notes | Are meeting objectives met?<br>Yes / No | Percent of meetings that achieved the meeting objective | Increasing percent of meetings achieving objectives over time until reaching 100% | These should be the objectives listed in the protocol used. |
| Process | Lesson plans<br>Meeting notes | What action steps were taken? | List of action steps or interventions and their frequency of use | A diverse list of steps taken that can be correlated with changes in student outcomes | |
| Outcome | Lesson plans<br>Observation | What new practices are teachers using? | List of new strategies or methods used in classrooms over time | Increasing frequency of evidence-based strategies used | Map new strategies teachers use to those identified in meetings to correlate the two. |
| Process | Survey | Do team members find meetings valuable?<br>Yes / No | Percent of team members who find meetings valuable | Increasing percent of team members until reaching 100% | |

# Notes

1 Berry et al, *Collaboration*

2 Marzano et al, *School Leadership that Works*

3 Lankford et al, “Teacher Sorting”

4 Burns and Symington, “A Meta-Analysis”

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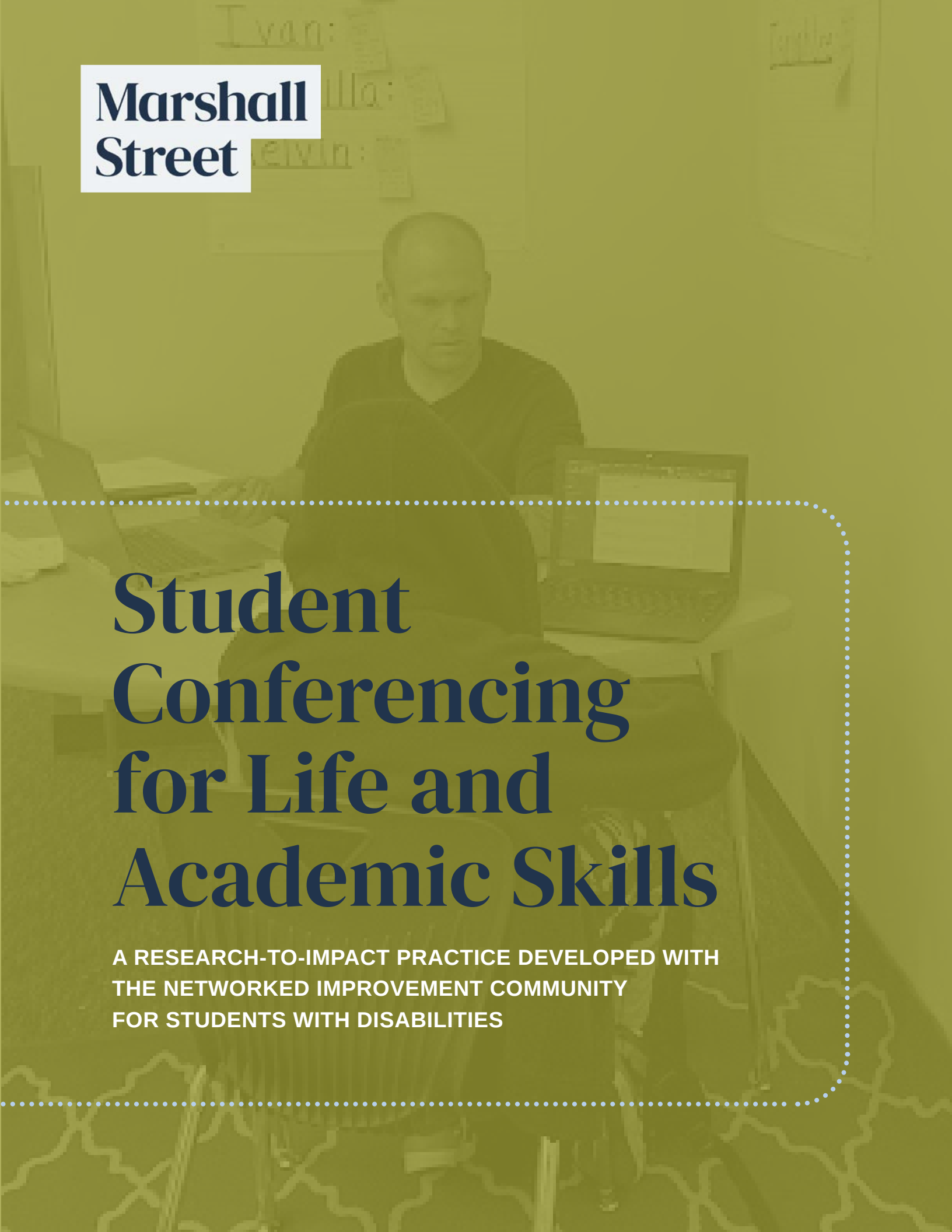
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Marshall Street



# Student Conferencing for Life and Academic Skills

**A RESEARCH-TO-IMPACT PRACTICE DEVELOPED WITH THE NETWORKED IMPROVEMENT COMMUNITY FOR STUDENTS WITH DISABILITIES**

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# Student Conferencing for Life and Academic Skills

**Implementation Level**

- [ ] District/Central Office
- [x] School
- [ ] Program/Department
- [x] Classroom

**Who Implements**

- [x] Teacher(s)
- [ ] Instructional Coach
- [ ] Principal
- [ ] Central Office Leadership
- [ ] Specialist

## Practice Overview

### What is the Practice?

Student conferencing is a regular, consistent time during school days for educators to coach students 1:1 on how to set goals, make plans to achieve their goals, enact their plans, and reflect on their progress.

### Why is Student Conferencing Important?

Many Black and Latinx students with disabilities experiencing poverty are subjected to school cultures with low expectations, are not given autonomy to direct their own learning, and are not given opportunities to engage in deeper learning.[1] Student conferencing is a structure that helps interrupt the negative cycle of low expectations. It builds students' skills for success by providing a time for students to explicitly learn habits through 1:1 reflections with educators.



## Why it Works

David Yeager, Carol Dwek, Angela Duckworth, and many other researchers have demonstrated the importance of habits and skills such as grit, perseverance, and agency for student success in school and life. There is a strong **body of evidence** that underpins student conferencing as a structure that works to build these critical habits and skills for success:

### SENSE OF BELONGING AND DEEPER RELATIONSHIPS

The regular 1:1 interaction between students and teachers during student conferencing helps students build positive relationships with adults in the school building. When students have strong relationships with adults, as well as with other students in their school, they can feel a sense of belonging that can translate into increased engagement and, eventually, academic success.[2]

### GOAL SETTING

Goal setting is associated with increased perseverance, higher aspirations, and positive homework behavior, as well as some improved outcomes for the lowest-performing students.[3] By explicitly teaching students how to self-monitor grades, identify achievable goals, and reflect on progress, students can be empowered to drive their educational futures forward. Student conferencing gives students the opportunity to practice identifying their goals and to learn from their educators how best to achieve them.

### Teaching and Using SMART Goals

At **KIPP Northern California**, special education case managers begin their conferencing work by teaching students how to create their own SMART (Specific, Measurable, Achievable, Relevant, and Time-Bound) goals. By focusing first on SMART goal setting, case managers can easily direct future check-ins based on those goals. Clear data on student goal attainment also helps case managers consider what steps are most effective in helping students reach their goals.

### SELF-DETERMINATION

Students build self-determination — the initiative to plan, implement, and evaluate their own learning needs and outcomes, with or without the help of others[4] — by developing a host of skills that are generally not explicitly taught to students outside of conferencing.

Some of the skills include:

- understanding how assignment completion impacts a final grade, including how some assignments are worth more than others;
- creating a goal to address the high-leverage assignments to get the desired grade;
- making a plan for how to study more effectively for a test;
- connecting learning to personal goals;
- advocating to teachers when extra time or additional help is needed; and
- regulating emotions in response to setbacks.

### EXECUTIVE FUNCTIONING

Students with disabilities, especially those who are Latinx, Black, and living in poverty, particularly benefit from this practice because many disabilities affect executive functioning skills and thus require explicit instruction to increase these skills.[5]

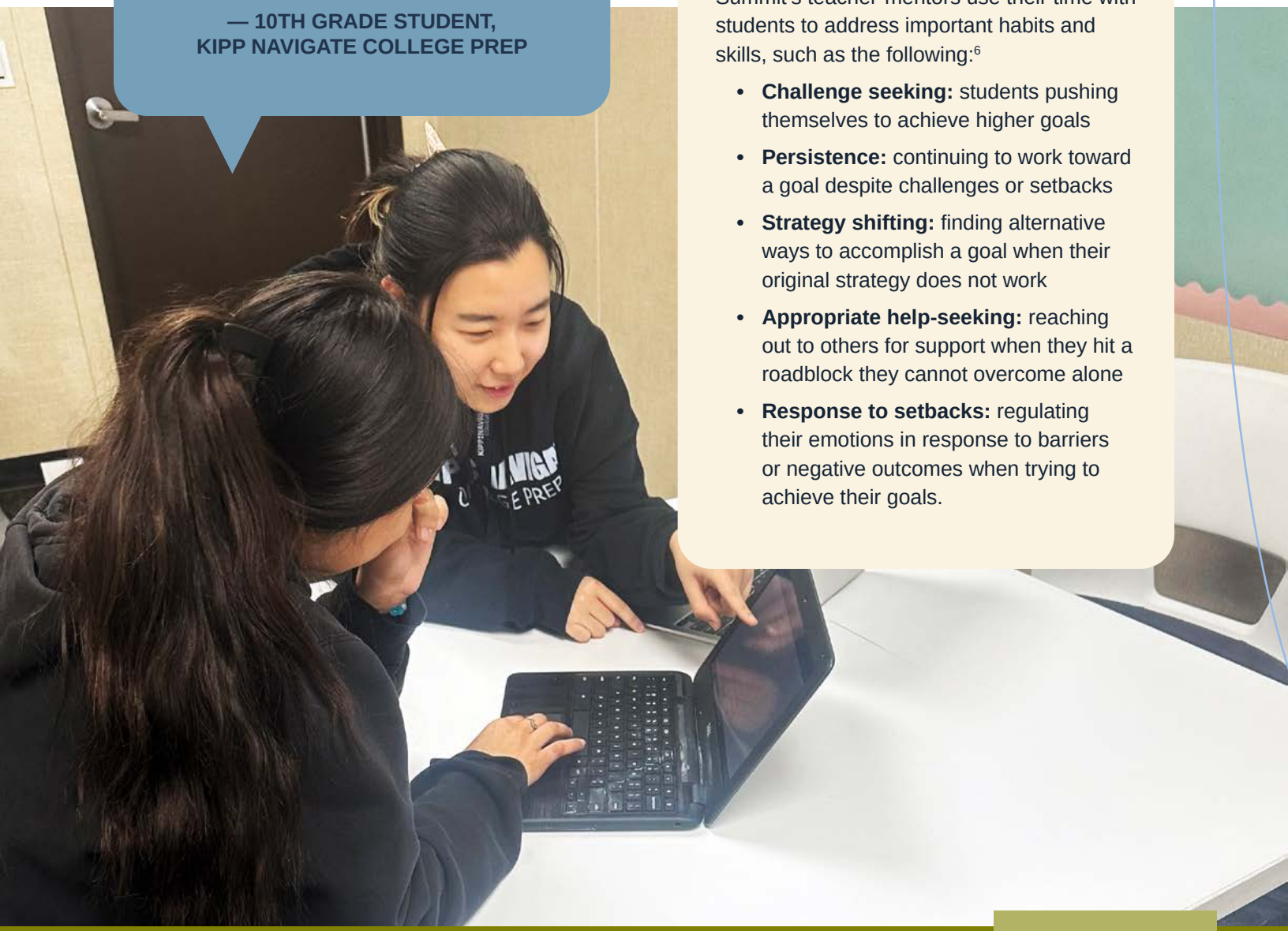
> "I like that I get to talk to someone about school. Even though I see [my teacher] every day, I like having one-on-one time."
>
> **— 10TH GRADE STUDENT, KIPP NAVIGATE COLLEGE PREP**

## Summit's Mentorship Structure

Nearly two decades ago, **Summit Public Schools** pioneered weekly 1:1s for every individual student. Over time, Summit has evolved the structure, content, and process for these meetings to better meet all students' needs. Through long-term mentoring relationships, teacher-mentors become the students' advocates, inside and outside of the classroom. Mentors provide guidance, support, and skill-building so that, eventually, the leadership of weekly meetings shifts to students. Mentors also come together to meet and discuss individual student's needs in a structure called Kid Talk.

Summit's teacher-mentors use their time with students to address important habits and skills, such as the following:[6]

- **Challenge seeking:** students pushing themselves to achieve higher goals
- **Persistence:** continuing to work toward a goal despite challenges or setbacks
- **Strategy shifting:** finding alternative ways to accomplish a goal when their original strategy does not work
- **Appropriate help-seeking:** reaching out to others for support when they hit a roadblock they cannot overcome alone
- **Response to setbacks:** regulating their emotions in response to barriers or negative outcomes when trying to achieve their goals.



# Implementation at a Glance

The information in this section provides a high-level view of what to consider when implementing this practice. Enabling Conditions describes the minimum conditions needed for successful implementation, including resources, mindsets, staffing, and recommended time allocation. Steps to Implement presents a concise checklist of action items, which are explained in detail in How to Implement this Practice, below.

## Enabling Conditions

| | |
|---|---|
| Prerequisites | • System for communication across teachers to share information about student needs, priorities, and plans<br>• A schoolwide understanding of the concepts of universal, additional, and intensified supports<br>• Belief among teachers that holding student conferencing can help students achieve their goals |
| Recommended Materials | • Conference protocol or agenda<br>• Student goal and progress tracker for whole-staff communication |
| Staff Commitment | **Initial Training**<br>• 1 hour of teacher training on using the school grade reporting system, particularly from the student's perspective<br>**Ongoing PD and Meeting Time**<br>• 1 hour per quarter for ongoing teacher professional development<br>• 1 hour per month meeting time for educators to share student information from conferences |
| Recommended Time Allocation | • Class time for the general or special education teacher to implement 10–15 minute 1:1 student conferencing (see Conferencing Cadence and Class Blocks) |

# Steps to Implement

### GETTING STARTED

To **get started** at the beginning of the school year, **school leaders:**

- [ ] Use data to identify students who need student conferencing
- [ ] Help educators determine student conferencing schedule
- [ ] Help educators develop a standardized meeting protocol
- [ ] Establish a communication system for collaborating teachers
- [ ] Embed student conferencing supports in coaching structures

### HOLDING STUDENT CONFERENCES

Throughout the school year, to **hold student conferences:**

- [ ] Students complete pre-work
- [ ] Educators create independent or partner work for all students
- [ ] Educators set up a conferencing space
- [ ] Students and educators hold student conferences
- [ ] Students implement their plans
- [ ] Educators document outcomes from student conferencing






# Bringing this Practice to Life

## ACCELERATING LEARNING WITH STUDENT CONFERENCES AT STRIVE PREP

*STRIVE Prep Federal[7] in Denver, Colorado wanted their students to take ownership over their short- and long-term goals, grades, and study habits. Teachers there realized that these self-determination skills needed to be taught explicitly for students with disabilities. To do that, STRIVE Prep Federal introduced student conferencing structures. The team piloted student conferencing in one special education math class, and encouraged by the pilot's success helping students pass classes, they have since spread the practice to multiple classrooms across grade levels. The scene described below shows a typical conference between one student and her teacher.*

### Starting a Conference

Jolisa and her math teacher, Mr. Miller, get settled and organized across from each other at a table with their laptops. Mr. Miller helps Jolisa find the right bookmark and pull up her student portal, while he also pulls out a paper form to start their check-in.

**Mr. Miller:** How is your week going, Jolisa?

**Jolisa:** I'm yellow. [points to "yellow" on her check-in sheet]

**Mr. Miller:** Why are you a yellow?

**Jolisa:** I'm tired from staying up too late.

**Mr. Miller:** How do you think being tired impacts you at school? I love how much energy you bring to my math class, and I'd love to see you be able to give the same energy to all your classes. How can we find some ways to help you get enough sleep each night?

This initial interaction between Mr. Miller and Jolisa starts their check-in with an opportunity to build their relationship. Mr. Miller shows Jolisa that he cares about her well-being and sees the positives in her even when she isn't feeling like she's at her best.

## Reflecting Using Data

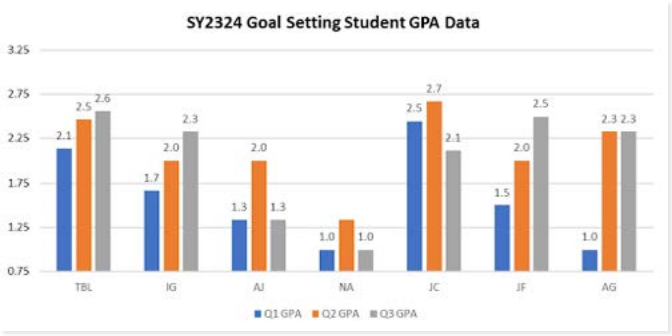
From there, Mr. Miller asks Jolisa questions about her academic successes and challenges from the last week. Her reflections naturally lead them into a conversation about Jolisa's current grades. Mr. Miller guides Jolisa through the process of looking for patterns in her grades. When he sees some troubling grades in her math and English classes, Mr. Miller asks Jolisa to look at her assignments in those classes. Jolisa acknowledges that despite turning in all the assignments, she didn't complete them all and doesn't feel confident that what she turned in was correct.

Mr. Miller then spends time asking about specific, low-scoring assignments, which allows him to work with Jolisa on regulating her negative emotions around her struggles with some assignments. He reminds her of her past successes and tries to redirect her. Mr. Miller also explains to Jolisa that it is helpful to look at her grades in classes to see how she did on assignments because she can usually meet with her teachers to revise her work and get higher grades.

## Planning for the Future

Key to this redirection is focusing on Jolisa's long-term goals of going to college and studying art. Mr. Miller reminds Jolisa that passing her classes is the way to achieve those goals. He is then able to help Jolisa make a plan of action for how she can revise and then resubmit high-quality work. The two create a new goal for Jolisa to revise one assignment that she needs to resubmit by their next check-in. Mr. Miller asks Jolisa to restate her goal and then to write it on a sticky note to put on the class's public goal board.

## Outcomes from Conferencing




The entire student conference takes Mr. Miller about 13 minutes. These steps help develop a culture of care, accountability, and reflection that are reinforced every two weeks during student conferencing.

The initiative has already benefited students. All of the students who had an IEP and met with Mr. Miller for student conferencing passed all of their classes. When Mr. Miller spread student conferencing to his advisory class, 80% of students who had an IEP and met with him for student conferencing increased their GPA that semester. They did that by using self-advocacy skills, by learning routines for completing tasks, and by learning how to transfer good work habits from classes they liked to use in classes they did not enjoy. Improving their grades was just the beginning for Mr. Miller's students, who now also feel valued, empowered, and motivated to reach for their goals in life.

# How to Implement this Practice

This section provides step-by-step guidance for implementing student conferencing, along with accompanying resources to get started. The steps are organized into two sections for implementation: Getting Started and Holding Student Conferences.

## Getting Started

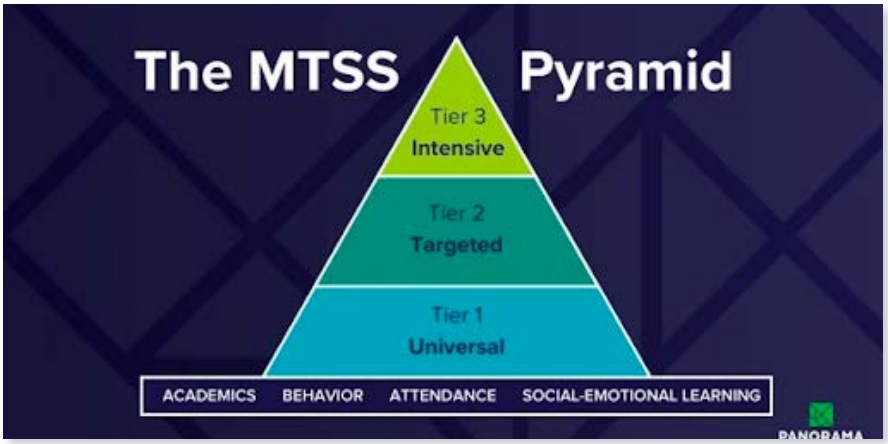
When school leaders set up school-wide systems and supports for student conferencing, the practice thrives and student outcomes improve. Below are various system elements school leaders can implement prior to the start of the school year to enable successful student conferencing.

### Step 1: Use Data to Identify Students Who Need Student Conferencing

While conferencing can be structured as a system-wide universal intervention, it can also be done to provide targeted or more intensive support to a subset of students who need additional support in building social-emotional skills, study skills, or relationships. School-based teams can use data to identify a select number of students who need student conferencing the most or to determine whether an entire caseload or class should receive conferencing as a universal intervention. (See ***Establishing Effective Data Routines in School-Based Teams***.)

Student conferencing can also be implemented at varying levels of frequency and intensity. Conferencing can happen weekly, biweekly, monthly, or even quarterly, depending upon individual student needs and educator capacity. In many circumstances, it is not feasible to check in with all students on a biweekly basis, so it is useful to prioritize the students who need conferencing the most. It is helpful to use a variety of data sources to determine which students need conferencing at what level. Student grades, surveys (e.g., Panorama Climate Survey), and staff feedback can all be used to make these determinations. A few students will need the most frequent student conferencing schedule, while students who are independently succeeding in all their classes may just need periodic check-ins.

**THE LEVELS OF INTERVENTION STUDENTS NEED IN AN MTSS SYSTEM**



## Step 2: Help Teachers Determine Student Conference Schedule

Conferences are generally most effective when educators are able to devote 10 to 15 minutes to each conference. When establishing a schedule, educators can use the data analysis from Step 1 to determine how many days per week to devote to conferencing and how often per month they can meet with each student.

### CONFERENCING CASELOADS

Available time to conference with students often restricts the number of students who can feasibly have conference sessions.

### CONFERENCING CADENCE AND CLASS BLOCKS

The table below presents a variety of ways that schools within the Marshall Street Networked Improvement Community (NIC) built conferencing cadences and class blocks into their school schedules.

## Focusing on Students with the Highest Needs

**KIPP Northern California** started implementing student conferencing with their special educators with just a few students each and gradually added more. They developed the following criteria to decide which students would be introduced to conferencing next:

1. Students who are failing (or are in jeopardy of failing) one or more core content classes
2. Students who are multilingual learners
3. Students who special educators identify as needing the additional support of a check-in

The team amended their criteria as identified student needs changed. Instead of focusing on multilingual learners, they decided to prioritize:

1. Students who are recovering credits from previous semesters
2. Students who have behavior improvement plans

By leveraging student information from project goals as well as educator knowledge to create these priorities, KIPP Northern California was able to maintain teacher buy-in for conferencing.

| | Advisory/Homeroom | Core Classes | Block Classes |
|---|---|---|---|
| **Class Schedule** | 30-minute period, three days per week | 50-minute period, two days per week | 120-minute period, once per week |
| **1:1s per Class** | Two | Three | Seven |
| Level of Intervention | Targeted Conferencing* | Targeted Conferencing<br>Universal Conferencing** | Targeted Conferencing<br>Universal Conferencing |

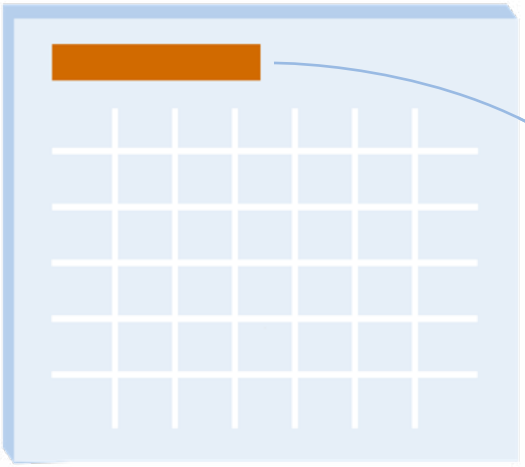
** Targeted Conferencing: Up to 12 students receiving biweekly 1:1s*

*** Universal Conferencing: Up to 28 students receiving monthly 1:1s*

## Implementing Conferencing with Less Structure

**KIPP Northern California** began implementing student conferencing with three special education case managers. Each case manager first conferenced with only one student who they knew would be willing to participate for several months, and later added to their conferencing schedule two additional students who had a greater need for this time. These conferences had to be slotted into the weekly schedule wherever possible because the case managers did not necessarily have the students they managed in their advisory periods. The challenge for case managers was to ensure they still prioritized student conferences amid the multitude of other tasks they were responsible for in a week.

KIPP's initial pilot was able to prove the value and effectiveness of student conferencing to the school leader, who created two dedicated conferencing periods for special educators the following year. By making this shift to teacher's schedules, the school was able to offer biweekly conferences to more than twice as many students.



## Keeping Conferences Meaningful While Scaling

**STRIVE Prep** initially implemented student conferencing in a math class for students with disabilities. The special educator was able to use classroom stations during normal class periods to conference with students. As STRIVE Prep looked to scale its student conferencing practice to more classrooms, they found a way to do student conferencing during shorter advisory periods. The implementation meant conferences went from 12 or 13 minutes to less than 10 minutes, but they accomplished the same purpose of helping students set and meet goals.

## Step 3: Help Teachers Develop a Standardized Meeting Protocol

A conference protocol guides the conversation between teacher and student and provides an accessible way of taking notes and recording information. The protocol can be built into a web or paper form for ease of use. Consider how the protocol can let students have control and responsibility for conferences and for decisions made during conferences. It may also be helpful to have slightly different protocols based on the time of year:

**Use *beginning-of-the-school-year conferences* to build relationships, establish trust, and ensure a strong foundation.**

Beginning-of-year conference protocols could include the following:

- Relational check-ins for teachers to get to know their students and their students' values, mindsets, motivations, and roadblocks. This is also when teachers can discover students' long-term goals to better understand what students and teacher are building toward.
- Opportunities to **build trust**, create a space where students want to be, and establish a relationship that they value as an important part of their week.
- Explicit instruction on writing SMART goals, how to get into student portals, expectations around independent or partner work, and the difference between short-term goals and IEP goals.

Orientation is a great time to set the stage for these foundational conversations so that when conferences become more data-driven and students start setting more concrete goals, teachers can use students' personal information to provide them guidance.

***Middle-of-year conference* protocols could include:**

- focus on academic performance,
- setting specific learning goals,
- creating plans to reach those goals, and
- reflecting on previous weeks.

## Explicit Instruction of Conferencing Skills

**STRIVE Prep**'s math teacher who piloted student conferencing taught his classes the steps of the conferencing process with activities to illustrate each strategy. For example, he started with lessons explicitly teaching his entire class how to write SMART goals. KIPP Northern California, on the other hand, chose to teach **these lessons** during the first few conferences between students and their case managers.

## Letting Conferences Change During the Year

**KIPP Northern California** created a series of conference protocols, which changed based on the time of year each conference would be held. This allowed case managers and students to shift their discussions, for example, to set new goals at the beginning of a semester or focus on course finals at the end.

**By the *end of the school year*, some students may be able to run conferences themselves.** Educators can use various gradual release strategies to support this level of student agency. Some strategies include:

- asking students to check and document their grades before their check-in,
- providing students a script for leading each section of the check-in,
- having students calculate their progress toward their goal, and
- asking students to write their own SMART goals and give feedback during check-ins.

Because conference meetings are very short, staying on schedule may be the biggest implementation challenge. Schools in the NIC used several successful strategies to manage time during conferences:

- Teachers gave conference pre-work to students, prompting students to review previous goals and to reflect on progress and barriers prior to their conference check-in. This ensured students came to conferences ready to share.

- Teachers used a clear time-keeping strategy — such as assigning students to keep time or use a projected timer on the board — to help keep conferences at their designated times.
- Teachers prepared a bank of action steps for students to choose from, rather than having them come up with ideas for actions on their own.
- Teachers created cloze statements and sentence starters for key elements of the meeting so students could focus on the objective of each task — creating SMART goals, for example — rather than on constructing sentences.
- Teachers adjusted the protocol to meet individual student needs, focusing on specific components different students may need rather than trying to cover every subject.

## Step 4: Establish a Communication System for Collaborating Teachers

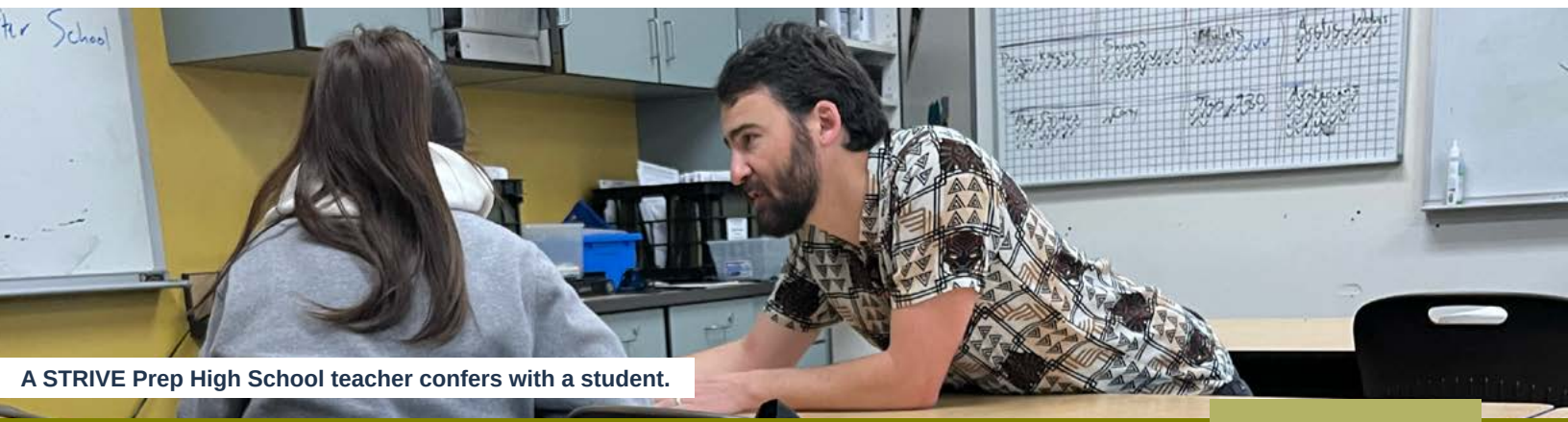
It is important that collaborating teachers can easily document and share student goals, plans, and progress. This information aids teacher follow-up with students and communicates the current status with other staff. A shared spreadsheet can allow staff members convenient access to conference documentation. School leaders can use existing structures to create a time and place for sharing information from conferencing, such as grade-level meetings, co-planning sessions, or schoolwide "kid talk" sessions.

## Step 5: Embed Student Conferencing Supports in Coaching Structures

Collaborating teachers benefit from coaching support and professional development focused specifically on student conferencing. Examples of this might include the following:

- **Observations of student conferencing:** Ideally, instructional coaches observe student conferencing so educators can receive constructive feedback on how to improve conferences.
- **Training on school grade reporting system:** By giving teachers training on using the school grade reporting system, particularly from the student perspective, teachers are then equipped to help students navigate the systems.
- **Professional development on teaching skills:** Through school-wide professional development, teachers can gain skills to build relationships with their students, coach students on habits of success, and help students manage setbacks.

A simple guide can also help educators hold high-quality conferences.



A STRIVE Prep High School teacher confers with a student.

# Holding Student Conferences

## Step 6: Students Complete Pre-Work

Student conference meetings are very short, typically 10–15 minutes. Completing pre-work before the conference ensures the best use of that 10–15 minutes. For example, students can look up grades or other data related to their goals and begin filling out information on the conference form. This pre-work can be assigned as either homework or classwork.

### Differentiating Conference Structures

At **STRIVE Prep**, some students complete their grade reflections independently, ahead of the 1:1, once they've shown that they know how to independently review and reflect on current grades. This practice can also save time in cases where a teacher needs to shorten the conference length for some students.

## Step 7: Educators Create Independent or Partner Work for All Students

In order to be free to conduct 1:1 conferences during class, teachers must create independent or partner activities for all students to work on during conferencing. Additionally, teachers will need to spend sufficient time setting expectations for students during independent work.

## Step 8: Educators Set Up Conferencing Space

Because teachers conduct 1:1 conferences in the same classroom as the rest of the students, a dedicated space for conferencing will be needed. Teachers should set up a conferencing space in the classroom such that they can see the rest of the students while maintaining some privacy for the student in the 1:1 conference.

## Step 9: Students and Educators Hold Student Conferences

Though students need different amounts of support and time in each part of their check-in, 1:1s typically will cover the following steps:

- Relational check-in (2–5 min.)
- Goal setting (2–4 min.)
- Plan (2–6 min.)
- Accountability and next steps (2–4 min.)

The sample agenda on the following page is for a biweekly conference with a middle or high school student with a disability.

## SAMPLE CONFERENCE AGENDA

**Relational Check-in** (~3 min.)

- Ask the student how they're doing.
- Ask a follow-up question for more detail, to clarify, or to ensure they feel heard.
- Ask for a "win" the student has experienced since the last conference.

**Goal Setting** (~2 min.)

- Pull up the student's goals from the prior meeting, along with data on whether or not they met their goals.
- Ask the student what the data tells them about their progress. Help them understand whether it shows that they got closer or further from their goal.
- Ask students which classes they want to focus on this week and why, based on their progress, they have selected those classes.

**Plan** (~2 min.)

- Ask the student to consider barriers to reaching the SMART goal they just created. Gut check whether there is a "root cause" that is going unaddressed that could inhibit the student's progress toward their goal.
- Help the student modify their plan based on both where they are focusing their energy this cycle and their reflection on prior barriers. Make sure the student can give their rationale for modifications. For example:
  - "I will go to the teacher's office hours two days a week because I'm running into too many questions that I need the teacher's help to understand."
  - "My 'plan B' for when my parents can't give me a ride to school is to text my neighbor by 7:30 a.m. to get a ride with them instead."
- Ask the student if there is anything they need from you or other staff members at the school to help them be successful in acting on their plan.

**Accountability and Next Steps** (~5 min.)

- Have the student set reminders, identify how they want to communicate with other teachers or do follow-up, and publicly post their goal (to support accountability, transparency, and relatability across students).
- Set a date for the next check-in and any intermediate steps. Provide recommendations based on knowledge of schedule, upcoming deadlines, and the like.

## Step 10: Students Implement Their Plans

After the meeting, have students fill in any data that will be public, whether in a shared document or on a poster in class. Additionally, students will be responsible for implementing the plan they created during the conference.

There will likely be more times than not that students struggle to enact their plans. A host of barriers both within and outside of school can impede a students' ability to do what they said they would. Educators can use these opportunities to model the compassion and mental fortitude necessary to overcome obstacles to achieving one's goals. Both students and educators are likely to experience frustration at times, but persevering in the face of frustration is what will lead to success.

### Characteristics of a Good Conference at Summit Public Schools

1. Uses an agenda with timings set for the meeting
2. Allows time for personal matters, but does not let those impede having time to focus on academics
3. Builds trust by demonstrating **active listening techniques**
4. Spends time on both reflection (looking back) and goal setting (looking forward)
5. Gives the student feedback on their habits and skills

## Step 11: Educators Document Outcomes from Student Conferencing

Once conferences are over, educators document outcomes to aid in their own follow-up with the student, as well as to have a way to communicate the information to other staff. Use the communication channels established in Step 4 to share this information with other staff members and use structures such as grade-level meetings, co-planning sessions, or schoolwide conversations about students as a time and place for sharing information from conferencing with other staff members. Educators can also help students feel accountable and see that other students are working on the same skills by having a place in class to display students' goals and progress publicly.




*Goal setting and goal tracking tools for students at STRIVE Prep Federal*




# Practice Snapshot

## BUILDING MEANINGFUL STUDENT CONFERENCES AT KIPP PUBLIC SCHOOLS NORTHERN CALIFORNIA

*KIPP Navigate College Prep's special educators built relationships with students while teaching them essential skills through biweekly student conferences. The team built their conferencing program gradually to ensure that time spent in conferences benefitted students as much as possible. Whether writing SMART goals or advocating their needs to teachers, students who participated in student conferencing demonstrated that KIPP Navigate created systems and structures that can benefit all students.*

The special education team at KIPP Navigate noticed a trend that was negatively impacting student performance. Students, particularly students with disabilities, were waiting until the end of a semester to take action on missing work that was preventing them from passing courses. The end-of-semester rush made it difficult for students failing multiple classes to catch up. Students needed to learn the skills to help them stay on track in their classes all semester through regular touchpoints with their special educators.

To address this challenge, the special educators wanted time to meet personally with students to discuss their grades and to help students devise action steps to improve those grades. Holding biweekly student conferences during advisory seemed like a feasible way for the school's special educators to have the types of interactions with students that they felt could have a real impact on their attendance and grades.

Yet KIPP Navigate special educators had a logistical barrier: special educators each taught an advisory class that was made up of students not necessarily in their caseload. This meant that special educators had to find time outside of advisory when they could pull students from class to hold conferences with them. Making this time within the weekly schedule also meant that special educators would only be able to conference with a subset of students.

KIPP Navigate identified eight students for biweekly conferencing in their first year of implementation.

With the students identified, the special educators developed a conferencing protocol focused on students identifying SMART goals and developing steps to achieve them. Additionally, special educators reviewed how to write high-quality SMART goals in order to then support students in developing their own.

The results of student conferencing were positive. All of the participating students increased the number of classes they were passing during the school year, and over 75% of them passed all their classes. Even the most skeptical students at the beginning of their conferencing experience were, by the end, convinced of its benefits to them, as they were able to see their own progress and meet their goals.



**"I've learned [through the check-ins] that I need to be specific because it helps me meet my goals. I also learned how to better organize my thought process about my grades. The meetings helped me pass my classes because they kept me accountable."**

**— KIPP STUDENT**

Based on the initial positive reception to student conferencing, in 2023–24, KIPP Navigate built in two periods per week for special educators to conference with their students, more than doubling the number of students with whom they can meet. Additionally, special educators are continuing to calibrate their protocol and train students to complete prework, both of which will help reduce the length \of each conference. Special educators hope that spreading student conferencing to all of their students with disabilities will help them more quickly achieve their network goals for these students.

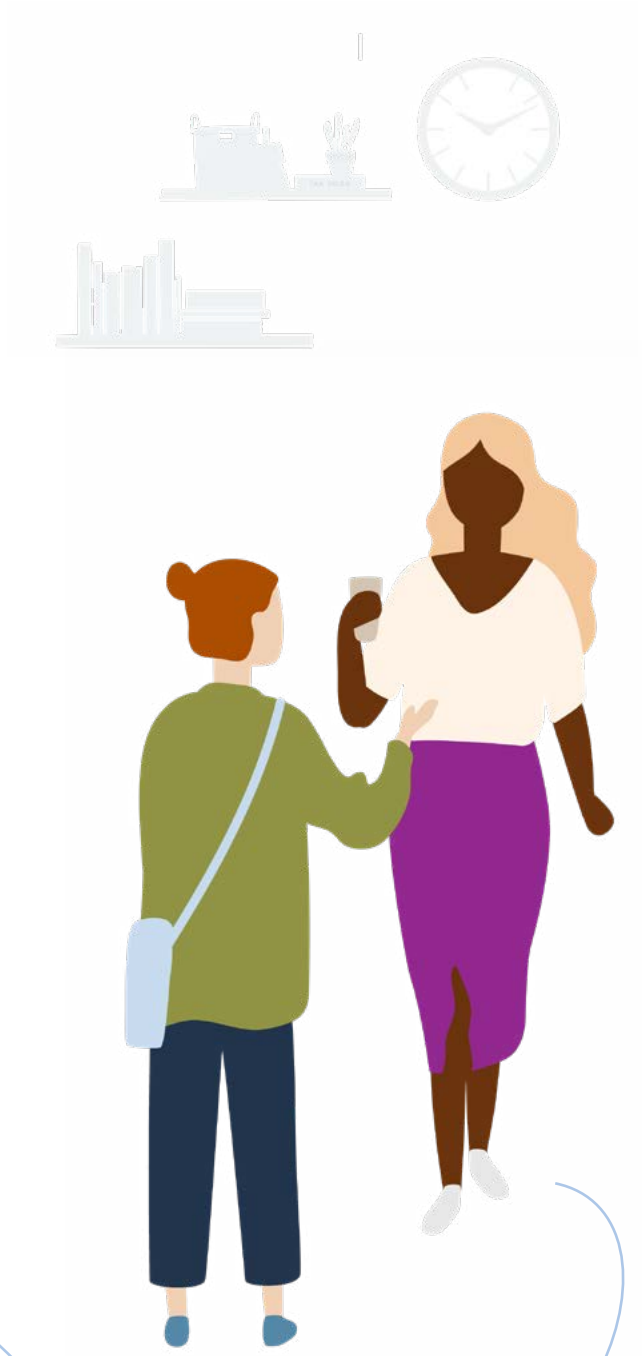


**"I like the check-ins and talking. I do work better after the check-in because I set up goals for myself. They've helped me with completing school work, and are a reminder for me to do my work in order to pass."**

**— KIPP STUDENT**

# Summary

Student conferencing is a useful strategy for helping students acquire habits and skills that aren't explicitly taught in school. Conferencing helps break the cycle of low expectations as students learn to monitor their grades and set reasonable goals for themselves. The time spent conferencing with students also helps develop student-teacher relationships that enhance a sense of belonging in the school setting. Implementation of student conferencing requires careful consideration of the needs of students, as well as planning of schedules and conference protocol. With such planning, student conferencing can be an effective way of improving student outcomes, particularly for Black and Latinx students with disabilities experiencing poverty.



FURTHER LEARNING

**Introducing Students to Goal Setting**
PANORAMA EDUCATION

**What is active listening?**
COURSERA

STUDENT CONFERENCING FOR LIFE AND ACADEMIC SKILLS

# Appendix

# Appendix

## How to Measure

When implementing student conferencing, monitoring how useful, usable, and utilized the practice is by team members and across the school system can accelerate learning to improve outcomes for students. At minimum, these measures are most essential:

| PRIMARY MEASURES | | | | | |
|---|---|---|---|---|---|
| **Measure Type** | **Data Collection Type** | **Question Asked** | **Results** | **What does success look like?** | **Examples and Notes** |
| Process (utilization) | Survey<br>Conference notes | Are check-ins being held?<br>Yes / No | Percent of students with a check-in held at desired cadence | Increasing percent until 100% of students receive a check-in at desired cadence | |
| Process (usefulness) | Conference notes<br>Goal tracker | Are students meeting their conference goals?<br>Yes / No | Percent of students who met their conference goals | Increasing percent over time until 100% of conference goals met | This measure can be displayed publicly in the classroom so students can see the whole class's progress graphically. |
| Outcome | Gradebooks | Are students submitting assignments at a higher rate?<br>Yes / No | Percent of assignments missing in each class<br>Fraction of classes with no missing assignments | Decreasing percent of assignments missing until reaching zero<br>Increasing fraction of classes with no missing assignments | This measure can be used to prioritize which classes to focus on with students during student conferences. |

Additional measures can guide a team to know whether the routine data protocol is leading to the desired improvements for students:

| SECONDARY MEASURES | | | | | |
|---|---|---|---|---|---|
| **Measure Type** | **Data Collection Type** | **Question Asked** | **Results** | **What does success look like?** | **Examples and Notes** |
| Process (usability) | Conference notes<br>Calendar review | On average, how long do student conferences take? | Average duration in minutes of student conferences | There is no one correct conference duration; the ideal conference length will be adequate to hold meaningful conferences for all of the participating students at the desired frequency. | Consider looking at the range of conference durations as well to see if some students need more time and why. |
| Outcome | Gradebooks | Are students passing classes at a higher rate?<br>Yes / No | Average percent of classes students are passing | Increasing average percent of classes passed until reaching 100% | |
| Outcome | Survey | To what extent are students feeling an increased sense of self-efficacy? | Average student ratings on a self-efficacy survey construct | Increasing average rating over time | A survey construct is composed of several questions that target the same concept. Example survey question: “I believe I can meet the goal that I set this week.” |
| Outcome | Survey | Are students feeling a greater sense of belonging? | Average student ratings on a 1–5 Likert scale | Increasing average rating until reaching 5 | This measure could be considered a process measure depending on the theory of action for conferencing. Sense of belonging is best measured using a survey construct rather than using one survey question. |

# Notes

1 Haberman, “The pedagogy of poverty versus good teaching”

2 Hattie, *Visible learning*

3 Martin et al, “Growth Goal Setting in High School”

4 Knowles, *Self-directed learning*

5 Perna and Loughan, “Executive Functioning Skills”

6 The habits and skills listed come from the work of Dr. David Yeager.

7 Strive Prep Federal is now known as Rocky Mountain Prep Federal.

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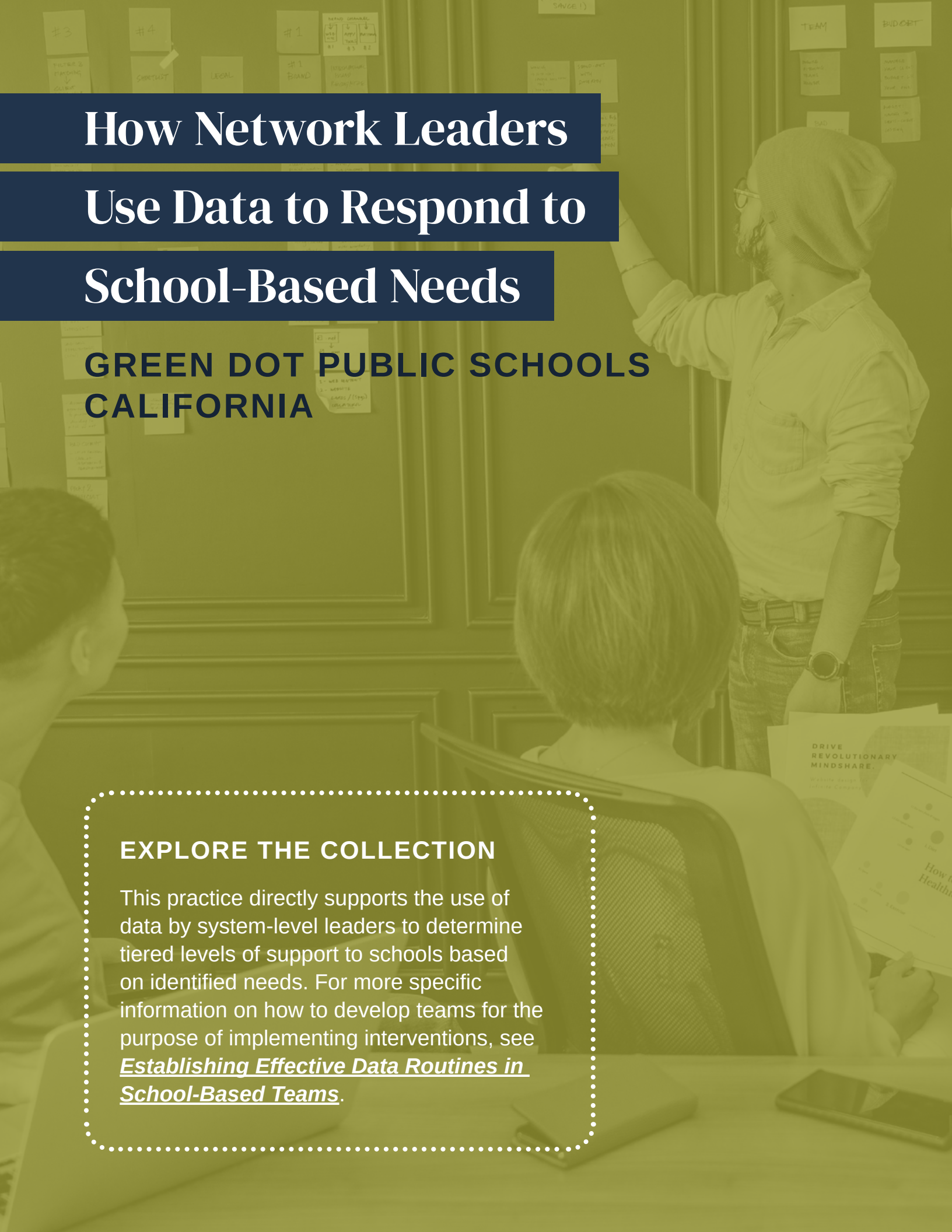
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# How Network Leaders Use Data to Respond to School-Based Needs

## GREEN DOT PUBLIC SCHOOLS CALIFORNIA




### EXPLORE THE COLLECTION

This practice directly supports the use of data by system-level leaders to determine tiered levels of support to schools based on identified needs. For more specific information on how to develop teams for the purpose of implementing interventions, see ***Establishing Effective Data Routines in School-Based Teams***.

# Snapshot

## WHAT IS THE PRACTICE?

An interdisciplinary, cross-functional team that meets regularly with a clear purpose, defined membership, and established routine to review data in order to identify strengths and needs and problem-solve to take timely action to intervene for all students.

## WHY IS IT IMPORTANT?

- School systems and teams are often designed to operate in silos, which limits effective collaboration and ultimately hinders positive impacts on students. This is true at the school level and also at the network level for many school systems across the country.
- Intentional structures are needed to break down silos and create opportunities to analyze data across teams for the purpose of allocating resources and support where needed.
- Network teams require a clear purpose, process, and next steps that align with existing ways of working and organizational goals.
- This type of collaboration can reinforce a sense of shared responsibility for all students. Students can be more fully supported in general education classrooms and achieve positive outcomes when teams bring together diverse knowledge, expertise, and creativity.



**"It helped me broaden my understanding of MTSS at the systems level, not just assigning and removing interventions to kids at the local level."**

— LEILANI ABULON, CHIEF PROGRAMS OFFICER

# The Challenge

## How can network teams use data to respond effectively to school needs?

At Green Dot Public Schools, the Ed Management team has, for many years, existed as a group working to improve network schools. Led by Green Dot's chief programs officer, Leilani Abulon, and chief academic officer, Ed Management brings together the area superintendents who manage and support principals, along with all the program directors, who work under Leilani and lead specific network-level departments such as math and science or special education. The departments and area superintendents have long collaborated on an as-needed basis, but previously worked primarily within their own teams.

Through their participation in the Networked Improvement Community (NIC), Green Dot's network leaders saw how multi-tiered systems of support (MTSS) could be applied much more broadly than to just classroom instruction. In particular, Leilani realized that MTSS could also be used as a framework for network and school-level support, school leader support, and teacher support across the network. The Ed Management team needed to adapt its team structures to make this possible.

# The Practice

## The Ed Management team reviews network-level data to take action for schools.

In collaboration with SWIFT Education Center and the NIC's MTSS professional learning community, Leilani created an initial structured protocol (approximately one hour long) so that network-level leaders on the Ed Management team could have a routine:

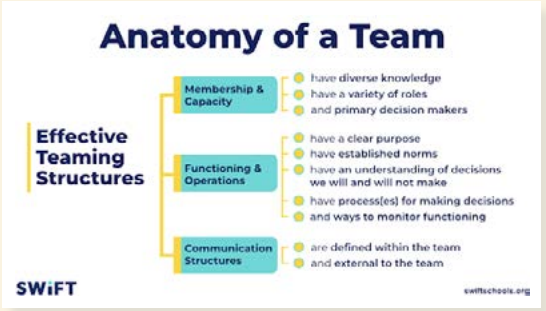
- to analyze school-level data,
- to maintain a bird's-eye view of the network to understand high-level data trends, and
- to coordinate support for schools and the network.

From the beginning, the team made key decisions to help them move forward:

- They would meet every month.
- They would use a specific data routine each meeting.
- They would agree on what data they would analyze each month and what questions they sought to answer using the data (as seen in the table).

### Considerations for Team Design

Teams are most effective when they are designed with intention. This image, created by SWIFT Education Center, identifies three main considerations for team design: membership and capacity, functioning and operations, and communication structures. Team leaders can build the specific structures for the team collaboratively with team members to ensure buy-in.



| DATE AND TIME | ACADEMIC DATA | CULTURE DATA |
|---|---|---|
| **July 14, 2022 (9–11)** | Feedback on Data Questions and Data Routine, Impact Reflection | |
| **August 19, 2022 (9–11)** | Attendance | |
| **September 16, 2022 (9–11)** | Universal Screeners: RI/Ready | Discipline Infractions Responsive (A): Reduction of 30% in 2 most common interactions by school from 21–22 to 22–23 |
| **October 7, 2022 (12–2)** | Grades | Universal Screener: SEL |
| **November 18, 2022 (12–2)** | Grades | Discipline Infractions |
| **December 16, 2022 (12–2)** | Grades | Universal Screeners: RI/Ready |
| **January 27, 2023 (12–2)** | Universal Screeners: RI/Ready | Discipline Infractions |
| **February 17, 2023 (9–11)** | Grades | Discipline Infractions |
| **March 17, 2023 (9–11)** | Grades | Universal Screener: SEL |
| **April 21, 2023 (12–2)** | Grades | Discipline Infractions |
| **May 19, 2023 (12–2)** | Universal Screeners: RI/Ready | Discipline Infractions |
| **June 16, 2023 (12–2)** | Grades | Discipline Infractions |

Importantly, after use of the protocol during the 2022–23 school year, the team opted for a more streamlined and shorter version of their data-for-equity protocol to analyze data. This type of protocol requires participants to look specifically at gaps between subgroups and consider the larger context in which data is collected. Team members are pushed to look at systemic inequities that may exist in their network or schools and to devise concrete actions that can be taken to fix them.

### Network-Level Data-to-Action Protocol

| | |
|---|---|
| **Individually** (10 min.) | Review data. |
| **Small Groups** (25 min.) | Share what you see in the data, particularly any gaps or opportunities that you notice. |
| | Share a question that comes up for you. |
| | Share hypotheses for why the data may look this way. |
| | Discuss what might be needed to address these issues. |
| **Whole Group** (25 min.) | Groups share out responses from small group sessions. |
| | Gain consensus on and solidify next steps. |

# How Green Dot Implemented the Practice

Over time, the Green Dot team developed a process to implement the data-to-action protocol, which they iterate upon each year as new members join the team, priorities evolve, and schedules change. Green Dot's Ed Management team follows clear steps to ensure they are addressing needs across the network:

**Step 1: Define the team's purpose.**

**Step 2: Determine the team members.**

- Make sure team members understand the purpose of the meeting.
- Define roles and responsibilities for team members.

**Step 3: Create a meeting schedule.**

- Reduce all possible conflicts.
- Reinforce the importance of the meeting by protecting the time on calendars.

**Step 4: Create the protocol.**

- Draft a team data protocol aligned to the purpose and vision of the teaming structure and routine.
  - The protocol should allow for data analysis, identifying trends, setting a goal, creating an action plan, and gaining consensus from the team.
  - The protocol should align all team members on the goal of each meeting so that if teams are broken up to focus on different data, topics, or even students, each group's action plan meets the common goal.
- Gain consensus on the data protocol and questions used in the protocol.

**Step 5: Identify the data to analyze.**

- Determine what data is most applicable to the team's purpose and goals.
- Data must be aligned with school and network priorities in order for it to be as useful as possible.
- Misaligned data will, over time, erode buy-in of team members.

**Step 6: Train team members on data analysis tools and methods.**

- Provide a specific step-by-step process and training on data tools that will be used by the team.
- Give examples of how to interpret the types of data that the team will look at regularly.
- Ensure understanding of how to analyze disaggregated data by subgroups based on the purpose and goals of the team.

**Step 7: Create a bank of potential action steps that can be taken.**

- This can be built by the team over time and/or prepopulated with interventions.
- Action steps should be feasible, within the team's locus of control, and timely.

**Step 8: Hold data meetings.**

Green Dot's Ed Management team found success in meeting regularly and learning how to use the protocol they had devised. Over time, the team learned important lessons about how to make these meetings more impactful:

- They needed action plans that they could drive to solve problems for schools.
- Their solutions should not create more work for their school teams.
- They had to be very targeted in the data they looked at and keep it consistent over time. This led to the eventual reduction in the amount of data analyzed.
- The data they looked at had to be similar to the data that individual schools were focused on improving.
- They needed time twice a year to step back and reflect on how effectively they were working together.

# The Impact

## Use of the network-level data-to-action protocol has built skills and capacity.

After about a year and a half of implementing and iterating upon their meetings, one of the biggest improvements that the Ed Management team made was including data questions and a common data routine during every meeting. Even if the team's focus shifted to different data, their data analysis skills and routines were still relevant. The team leaders started using the data-for-equity protocol in department-level meetings to help explore more department-specific equity gaps in the data.

The team continues to meet once a month and now focuses on staff capacity data and how it relates to professional development. The team is doing a book study and analyzing professional development exit slip data to answer specific data questions. Because the Ed Management team is responsible for much of the network-wide professional development, the team no longer needs to worry about who is responsible for implementing interventions and can respond quickly to data. Green Dot plans to triangulate student outcomes data and observational data in order to drive the focus of future professional development.

**To learn more about how effective school-based teams can help you improve learning outcomes for students with disabilities, see *Establishing Effective Data Routines in School-Based Teams*.**

***Green Dot Public Schools California*** *serves approximately 10,000 students in grades 6–12 across Los Angeles. Focal schools for the practice included Ánimo Watts College Preparatory Academy and Ánimo Mae Jemison Charter Middle School in Los Angeles, CA.*

*Green Dot Public Schools is a part of the* ***Marshall Street Networked Improvement Community,*** *a three-year intentional community of 10 public charter school networks nationwide aiming to make dramatic gains for Black and Latinx students with disabilities experiencing poverty. Collectively, the 10 networks identified over 20 best practices that improve learning outcomes and school culture for students positioned furthest from opportunity. Learn more here.*

FURTHER LEARNING

## The PD Book: 7 Habits that Transform Professional Development

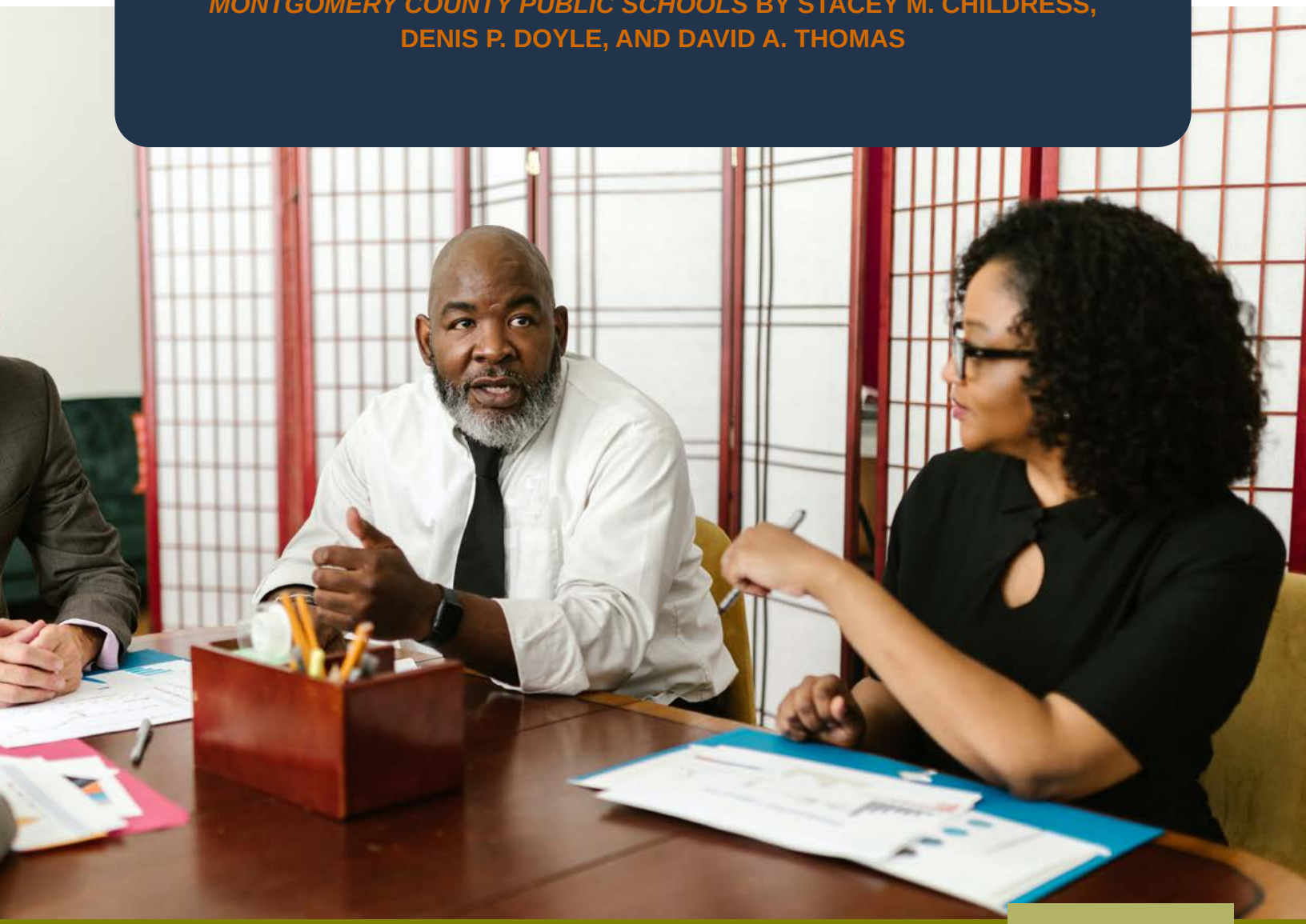
ELENA AGUILAR AND LORI COHEN

## "Integrated Teaming" (pages 161–171)

FROM *INTEGRATED MULTI-TIERED SYSTEMS OF SUPPORT: BLENDING RTI AND PBIS* BY KENT MCINTOSH AND STEVE GOODMAN

## "Data Routines" (pages 92–96)

FROM *LEADING FOR EQUITY: THE PURSUIT OF EXCELLENCE IN THE MONTGOMERY COUNTY PUBLIC SCHOOLS* BY STACEY M. CHILDRESS, DENIS P. DOYLE, AND DAVID A. THOMAS



# How to Improve Family Engagement with Text Messaging

## STRIVE PREP



### EXPLORE THE COLLECTION

This practice enhances family engagement by providing families with more regular access to information about their children while also generating valuable data on family engagement for educators and leaders to address. For more specific information on how to leverage data as part of a multi-tiered system of support, see ***Navigating Data for Multi-Tiered Systems of Support***.

# Snapshot

## WHAT IS THE PRACTICE?

The use of biweekly mass text-message communications to families, in both Spanish and English, to notify families about their students' academic progress and priority activities. Families can respond directly to a school staff member via text message if they have questions or concerns about their student.

## WHY IS IT IMPORTANT?

- Traditional methods of communication with families (e.g., progress reports, teacher letters, flyers) do not always reach families or students reliably or in a timely manner.
- Some families may struggle to attend events or meetings at school, which have historically been key ways that schools engage families and communicate essential information with families.
- Researchers found that daily communication between teachers and families immediately improved homework completion rates, on-task behavior, and class participation, and participants reported stronger teacher-student relationships, broader parental involvement, and increased student motivation.[1]
- Students whose families are more knowledgeable and involved in their education have been consistently shown to have better academic outcomes.[2]



**"It's been great to know grades as they're happening, not just get a progress report at the end of six weeks."**

**— PARENT, STRIVE PREP SMART**

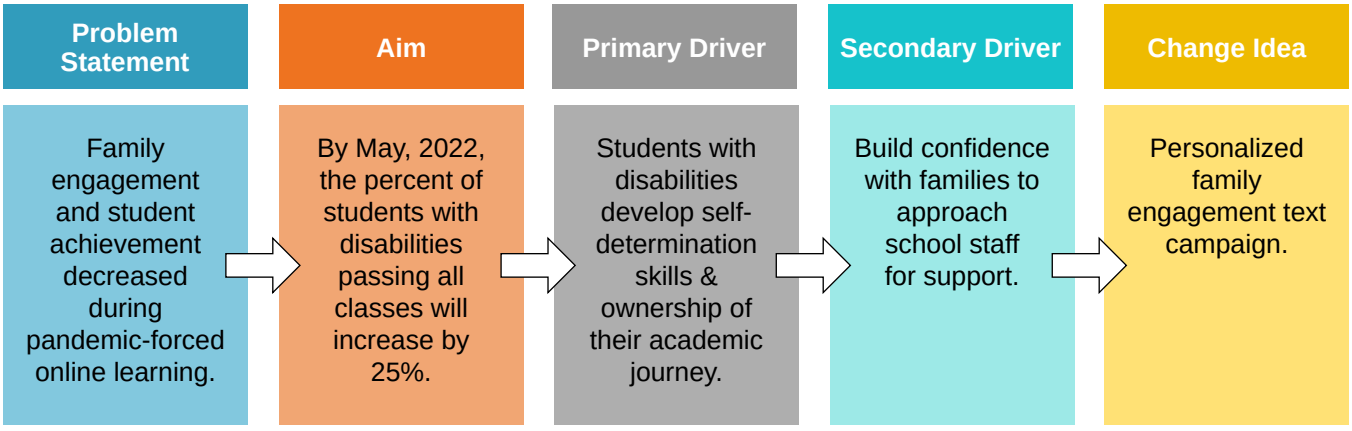
# The Challenge

## Engaging Families after COVID-19

As students began returning to in-person learning from the COVID-19 pandemic, two of STRIVE Prep's network leaders, Jen Bisha and Jose Loera, realized that there was a need to intentionally re-engage families to support student achievement. Their data revealed schools were having less frequent interactions with families than in prior school years, and they believed increasing family engagement was a factor they could meaningfully improve to increase student course passage rates. After careful reflection, they agreed that the solution should consider several key factors:

- Families were not logging into the network's parent portal that showed them their students' grades and assignments.
- Sixty percent of students with disabilities were failing at least one class.
- Families needed communication available in both English and Spanish.
- Families indicated that text messaging was their preferred method of communication.

Jen and Jose decided that text message communication was the ideal family engagement strategy. They chose to use ThruText, an online text messaging system for sending mass communications. This tool would allow the STRIVE Prep team to communicate student-specific information, such as failing grades and missing assignments, and establish a routine cadence for messaging to families. To ensure that all families had access to this critical information, the system would send messages in English and Spanish biweekly. ThruText would also prompt families to check students' grades on the parent portal and encourage them to engage in back-and-forth communication with staff. They hoped this strategy would get every family involved and aligned with the school so families could talk to their students about their education. These conversations would allow families and students to build helpful habits for communicating with each other about academic progress and what students need.



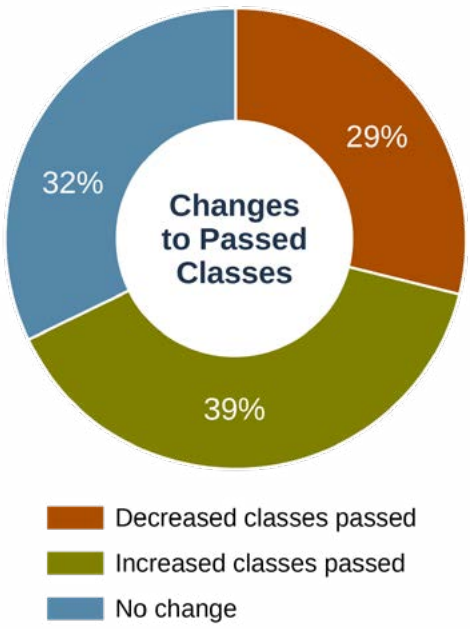

*STRIVE Prep's strategic thinking, represented in a driver diagram flowchart visual, connecting their problem statement and aim to the text messaging strategy to engage families*

# The Practice

## Starting Regular Text Messaging Conversations about Grades

### Prioritizing the Needs of Students with Disabilities

At the beginning of fall 2021, Jen and Jose decided to implement the text messaging strategy only for students with disabilities who were failing at least one class. As they launched this strategy, they quickly realized that even students who were passing all classes needed to build habits with their families around using the parent portal and communicating their needs at school. The team quickly expanded the text messaging practice to send messages to all families of students with disabilities. As a result, STRIVE Prep saw substantial improvements, with 39% of students with disabilities increasing the number of classes they were passing by the end of the fall semester.




Jen and Jose learned a few important lessons from this initial implementation of text messaging with families of students with disabilities. For the first text message, the team sent an introductory video explaining to families the information they would receive over the semester, how they could act on that information, and strategies to support their students. Unfortunately, not enough families watched the video when notified with just a text message. As an alternative strategy, the STRIVE Prep team posted the introduction video on each school's Facebook page and followed up with a text message asking families, "Will you take 10 minutes to read this update on your student's progress?" This strategy resulted in twice as many engagements with the video.



A STRIVE Prep Smart math teacher works with a student.

# How STRIVE Prep Implemented the Practice

Over time, STRIVE Prep learned important lessons on how to best implement their text message intervention. They created simple and targeted messages, a carefully planned calendar of texts, and a routine for sending text messages every other week. Families were able to anticipate when they would receive text messages and could easily respond to the school and their students about students' grades.

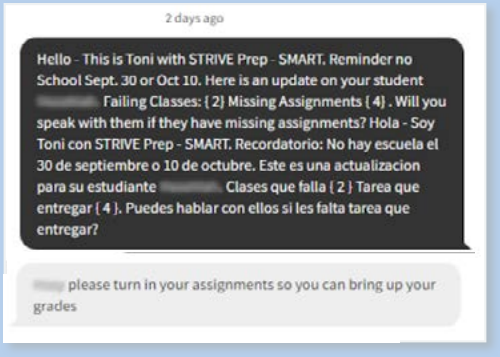
## Anatomy of an Effective Text Message

- Simplicity is key.
- Keep messages very simple and focused on a specific purpose.
- Parts to include:
  1. Introduction
  2. Student-specific information (e.g., number of failing classes)
  3. Upcoming important dates and events (e.g., holidays, final exams, or school-specific activities)
  4. A question to engage families

The table below shows examples of STRIVE Prep's prepared text messages for three weeks:

| Date | English | Spanish |
|---|---|---|
| **Sept. 15** | Will you watch this video today about school-wide expectations? https://vimeo.com/745187120/d54f410771f | ¿Verás este video do 10 minutos hoy sobre las expectativas en toda la escuela? https://vimeo.com/745187120/d54f410771f |
| **Sept. 22** | Hello - this is [INSERT SENDER's NAME] with STRIVE PREP - SMART. Reminder: No school Sept. 30 or Oct. 10. Here is an update for your student %FirstName%. Failing classes: (INSERT). Missing assignments: (INSERT). Will you speak to them about turning in these missing assignments? | Hola - Este es [insertar el nombre del remitente] con Strive Prep - Smart. Recordatorio: No hay escuela el 30 de septiembre u 10 de octubre. Este es una actualización para su estudiante %FirstName%. Clases de falla: (insertar). Asignaciones faltantes: (insertar). ¿Los hablarás sobre entregar estas tareas faltantes? |
| **Oct. 13** | Hello - this is [INSERT SENDER's NAME] with STRIVE PREP - SMART. Here is an update for your student %FirstName%. Failing classes: (INSERT). Missing assignments: (INSERT). Will you be attending family/teacher conferences on Oct. 20th? | Hola - Este es [insertar el nombre del remitente] con Strive Prep - Smart. Aquí hay una actualización para su estudiante %FirstName%. Clases de falla: (insertar). Asignaciones faltantes: (insertar). ¿Asistirá a conferencias familias/maestros el 20 de octubre? |

Families and students then receive messages they can reply to, like this:



# Expanding Parental Engagement to Benefit All Students

As they expanded the text messaging strategy to all students in the STRIVE Prep network, Jen and Jose created a **semester-long plan** of all text messages that would go out to families, taking into account holidays and other important dates to reduce the burden of sending text messages biweekly.

Importantly, they also decided to hire three "family ambassadors," family members of students at a STRIVE Prep school who would send and monitor text messages on a part-time basis. These family ambassadors would be integral to the text messaging process, particularly in communicating with families.

Each school principal created a **video introduction to ThruText** to share with families. The first text message families received included the introductory video and expectations for future text messages every other Thursday. Parents could opt out of the text messaging service, but no parents chose to do so.

Once this introduction to the text messaging service happened and the process was fully active, Jose routinely updated student information in ThruText every Thursday using a spreadsheet of grade data pulled from the student information system.

## How Schools Get Ready for Text Messaging

| Schools | Families |
|---|---|
| • A platform for automated text messaging<br>• Cell phone numbers of students and families<br>• Expectations for when and how families, students, and staff can interact with the messaging system<br>• A calendar that accounts for important events and milestones<br>• Questions for messages that avoid yes or no responses<br>• Introductory text message about the purpose of the text message process, what it is, and what it means<br>• A video that explains expectations for students and available resources<br>• An expectation that school staff update grades weekly before messages are sent out<br>• Alternate mode of communication for follow-up (Facebook, newsletter, etc.) | • A mobile device that can download and use the parent portal<br>• Individual login credentials |

Family ambassadors could then send biweekly text messages to inform families about students' progress. Families could reply to the messages when they had questions or needed additional information, and family ambassadors would respond. Family ambassadors were also responsible for compiling responses from text messages to share with school staff.

On the alternating weeks when messages were not sent, Jose looked at data from ThruText to see how many text messages were read, how many links were visited, and how many families responded. Students' advisors, school leaders, and teachers had the opportunity to use what was learned from the responses and to identify how they could implement the text messaging strategy more effectively in the future.

**TIPS FOR SELECTING A TEXT MESSAGING PLATFORM**

As STRIVE Prep's team considered various platforms they might adopt for this pilot, they needed to balance budget considerations between platform cost and time requirements for processing data. In the end, they chose ThruText because it was a less expensive platform than others they considered. Yet, this decision required considerable data management on the part of the STRIVE Prep team members, especially Jose, because it did not integrate with their student information systems.

When determining which platform is best for a family text messaging system, consider the following:

- Cost of the platform
- Integration of the platform with existing student information systems
- Skill level of team members to run reports and merge content between systems
- Capacity of team members to track engagement and response data
- Training requirements for staff members and families to navigate the system

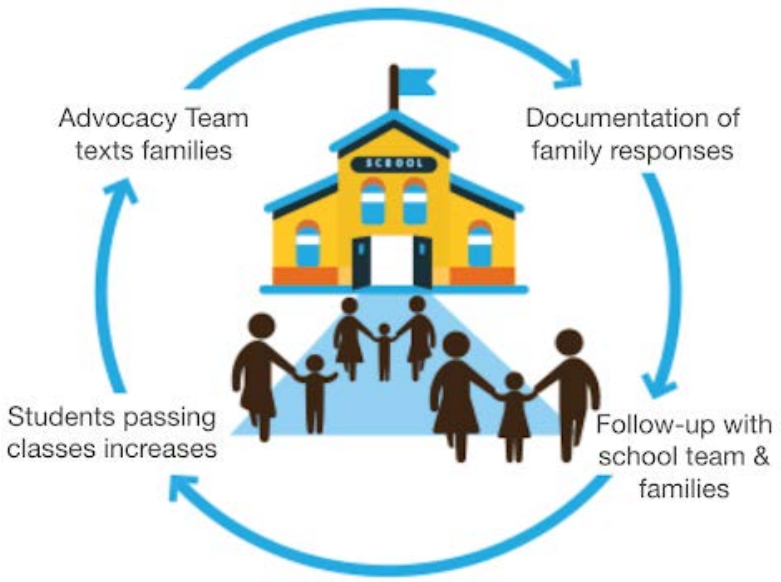
## Barriers to Solve

Even after the text messaging strategy was fully implemented, some barriers remained for the team to solve. One challenge was the limited access family ambassadors had to students' information beyond ThruText. Jen and Jose made sure that family ambassadors had the information that needed to be input into text messages, but without full access to the data systems, family ambassadors could not update information from families into the student information system nor retrieve details they needed about students to respond to follow up text messages from families. In the end, the limited access family ambassadors had to student data meant most data responsibilities lay with Jose. This both limited the impact the family ambassadors could have on family engagement with the text messaging system and put time burdens on Jose to complete data input and address follow-up requests on specific students.

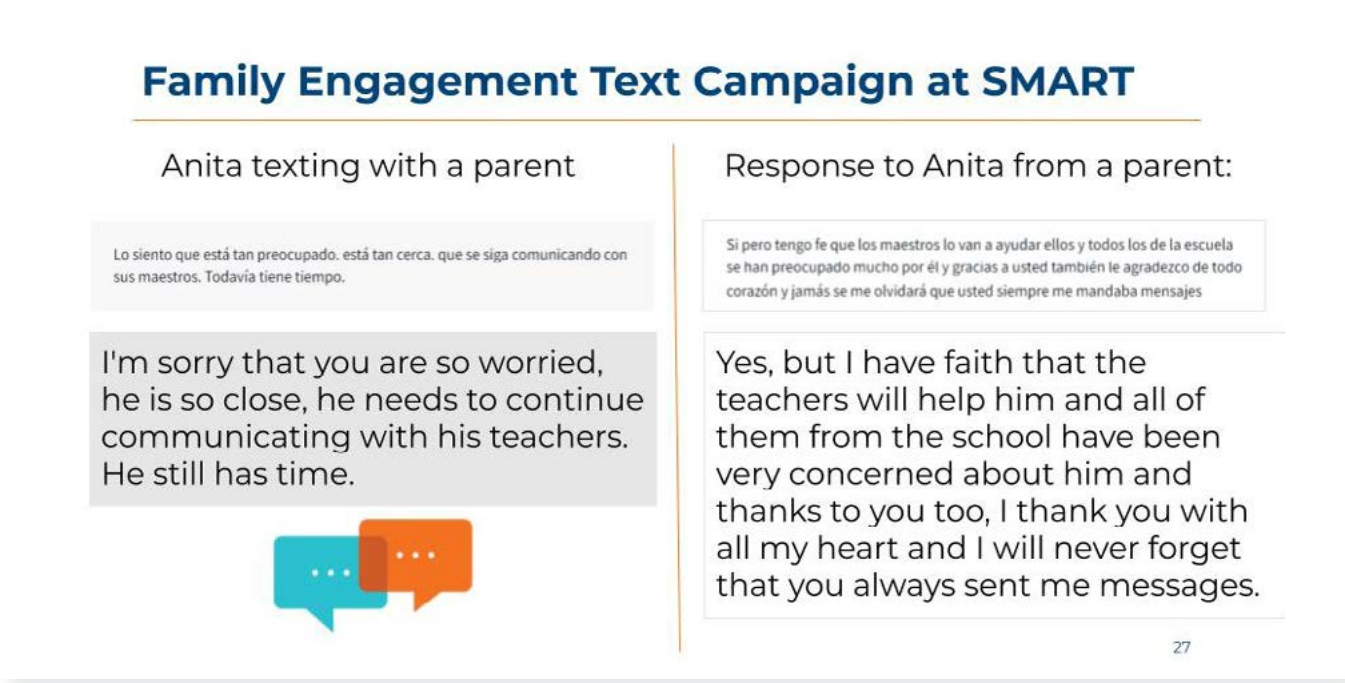
The team also ran into a logistical issue where they could only match one student per phone number, making it impossible to send text messages for two or more siblings at a STRIVE Prep school without applying special assignment rules. For example, in cases where there were two students in the household and two phone numbers for parents or guardians, the team could assign one student to each of the numbers; this did not work, however, if there were more than two students attending the school from the same household. Where the number of students from a single household exceeded the

number of available phone numbers, they established decision-making criteria to prioritize students in the household for text messaging communication, often prioritizing the student with the greatest need for family engagement based on special education eligibility, academic performance, or age.

While Jose regularly analyzed and shared data from biweekly text messages, STRIVE Prep school leaders and educators were unable to routinely review the data on family engagement and follow-up messages. By not reviewing the data on engagement and families' responses, the team did not always understand the home-life factors impacting student progress, valuable information that could have helped them respond appropriately in the classroom. Furthermore, they weren't able to investigate which students did not have family engagement and required further intervention or a different approach. As a result, a key stage in the theory of change that the school was trying to test (shown in the figure at right) was missing, creating a significant barrier to the effectiveness of the program.




*STRIVE Prep's theory of change for family text messaging*



# The Impact

## Using Text Messaging as a Way to Improve Family Engagement in Student Grades

Despite some of the challenges related to implementing STRIVE Prep's text message strategy, families and students benefited from this method of family engagement. When STRIVE Prep surveyed families about how receiving text messages impacted them:

- **100%** of families said they talked to their student as a result of a text message,
- **74%** of families said they checked their student's grades as a result of the text messaging, and
- **78%** of families said they felt comfortable talking to their students about their grades.

These results demonstrate that text messaging accomplished the desired effect of helping families communicate with their students about their grades and develop habits around checking students' grades.

One family expressed how much easier texting was than other forms of communication schools often used: "Text messages are very helpful. It helped me a lot because I don't use email that much." The text message strategy had the added benefit of ensuring that families received text messages in multiple languages so that engagement was not limited based on English fluency. STRIVE Prep also succeeded in accomplishing their goal of reconnecting the schools with families through a regular communication strategy. One family expressed their gratitude: "Thank you for always being aware of our children and helping them in their school progress."






*Survey responses sent via ThruText to families about the text messaging strategy*

## FURTHER LEARNING

### "Why Aren't Text Messaging Interventions Designed to Boost College Success Working at Scale?"

**BEN CASTLEMAN**

### "What Good Can a Phone Do? How Text Messaging Programs Have Been Used to Improve Education and Healthcare"

**JOHN HORSLEY**

### "It's Too Annoying: Who Drops Out of Educational Text Messaging Programs and Why"

**HANS FRICKE, DEMETRA KALOGRIDES, AND SUSANNA LOEB**

### "Some Evidence-Based Practical Tips for Designing Text-Based Parenting Programs"

**LELYS DINARTE-DIAZ**

**To learn more about how you can implement data-driven practices as part of a multi-tiered system of support, see *Navigating Data for Multi-Tiered Systems of Support*.**

***STRIVE Prep*** *is a part of the* ***Marshall Street Networked Improvement Community,*** *a three-year intentional community of 10 public charter school networks nationwide aiming to make dramatic gains for Black and Latinx students with disabilities experiencing poverty. Collectively, the 10 networks identified over 20 best practices that improve learning outcomes and school culture for students positioned furthest from opportunity. Learn more here.*

# Appendix

## Notes

1 Kraft and Dougherty, “The Effect of Teacher-Family Communication”

2 Seitsinger, “Examining the effect of family engagement”

## Bibliography

Kraft, Matthew A. and Shaun M. Dougherty. “The Effect of Teacher-Family Communication on Student Engagement: Evidence From a Randomized Field Experiment.” *Journal of Research on Educational Effectiveness* 6, no.3 (2013): 199–222. https://doi.org/10.1080/19345747.2012.743636

Seitsinger, Anne M. “Examining the effect of family engagement on middle and high school students’ academic achievement and adjustment.” *The Wiley Handbook of Family, School and Community Relationships in Education*, edited by Steven B. Sheldon and Tammy A. Turner-Vorbeck, 163–182. Hoboken, NJ: Wiley Blackwell, 2019.

Marshall Street

# How-To:

## Design and Prototype a Data Dashboard

### NAVIGATING DATA FOR MULTI-TIERED SYSTEMS OF SUPPORT

A collection of research-to-impact practices developed with the Networked Improvement Community for Students with Disabilities

# How-To: Design and Prototype a Data Dashboard

## Guidance Document for School and Network Leadership


**Introduction** ..... **8.3**

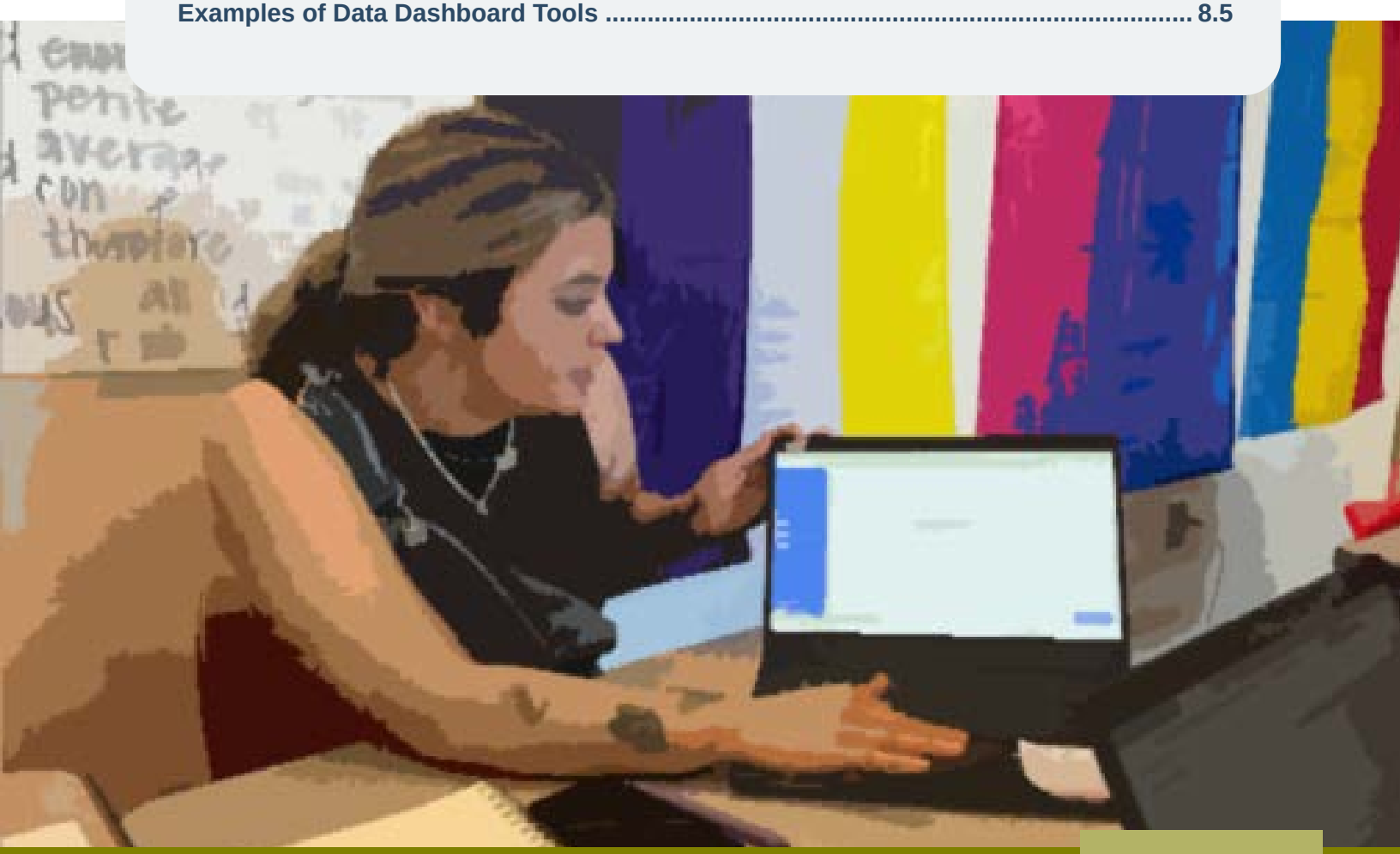
**Design and Develop** ..... **8.3**

Set Up Data Dashboard ..... 8.4

Test and Improve ..... 8.4

Routinely Assess Implementation and Quality ..... 8.5

**Examples of Data Dashboard Tools** ..... **8.5**

# Introduction

When existing data tools do not meet current needs and a school or network chooses to design a custom data tool, it is important to invest the necessary time and effort to ensure the tool is useful, usable, and utilized. Using Excel, Google Sheets, Tableau, or another data visualization tool, teams can customize a dashboard to import and manipulate data to suit the measurement effort. To do this successfully, school systems typically need an experienced data team with the knowledge and capacity to implement these technical needs.

The iterative process necessary to develop an effective data tool can be time-intensive. The following steps may be helpful when planning for this process.

# Design and Develop

First, during the design stage, identify a clear purpose for the data dashboard and define core priorities. The purpose and priorities should connect to student outcomes (e.g., achievement, GPA, attendance, or social-emotional skills) aligned with the school's mission.

The following questions are important to answer during this phase:

- **WHO ARE THE PRIMARY USERS?** (e.g., teachers, grade-level teams, school leaders, or central office)
- **AT WHAT LEVEL SHOULD EDUCATORS ANALYZE DATA?** (e.g., individual students, subgroups, class periods, courses, teacher, or school)
- **WHAT WILL EDUCATORS NEED TO BE ABLE TO DO WITH THIS DATA?** (e.g., reflect on a lesson, reflect on a unit, or identify gaps between subgroups)
- **HOW MUCH TECHNICAL ABILITY DO EDUCATORS NEED TO DEVELOP TO USE THE TOOL EFFECTIVELY?**
- **HOW WILL DATA BE INPUT OR DOWNLOADED INTO THE TOOL, AND WHO WILL MANAGE THAT PROCESS?**
- **HOW MUCH TIME WILL EDUCATORS NEED TO DEVOTE TO THE TOOL OUTSIDE OF MEETINGS?**
- **HOW OFTEN WILL EDUCATORS ACCESS THE DASHBOARD?** (e.g., daily, weekly, biweekly, or monthly)

## Building a Dashboard at Collegiate

**Collegiate Academies** found, early on, that their general student information system (SIS) did not allow teachers to view student mastery of standards by the types of filters they needed (e.g., grade levels, class periods, or subgroups) to evaluate and respond appropriately to the data in order to reteach skills students hadn't mastered. For that reason, Collegiate opted to create their own tool for looking at students' progress on standards and subsequently developed a spreadsheet dashboard that let teachers easily see how students were progressing on each standard and devise plans for how to teach and reteach skills.

These questions will help determine how to design the initial prototype of the dashboard. Key stakeholders may also have valuable input into what the dashboard should look like and how it should function.

## Set Up Data Dashboard

Build a prototype of the data dashboard based on the defined purpose, priorities, and requirements gathered in the design phase.

Using school-wide goals, determine which classroom-level data points best measure the goals to be used in the dashboard. These measures need to be relatively easy for teachers to collect with fidelity and consistency. Examples of data include:

- engagement measures, such as attendance or assignment completion;
- formative assessments, like exit tickets, checkpoints, or independent practice; or
- summative assessments, including project grades, course grades, or unit tests.

Once the dashboard is established, test it for usability by teachers.

### Building Tools for Every Level

Schools can choose between multiple, discrete dashboards that each serve a primary purpose, or nested dashboards that provide a one-stop-shop data experience for an entire school system. For ease of access, a single, nested dashboard allows teachers and district leaders alike to view the same data at different levels of aggregation, each using the dashboard to meet their individual objectives. For example, a chief academic officer can be monitoring school-by-school and student-group-by-student-group progress, while a school leader can track that data as well as classroom-by-classroom or grade-by-grade student progress. Teachers have access to this same data, but can focus their efforts on understanding their own students on a more granular level or collaborate across their grade-level team.

## Test and Improve

Test the prototype with teachers, who can give input on the tool's utility and ease of use, using a small set of representative data. Will users be able to easily disaggregate data at many different population levels, including class periods and subgroups? Can they easily refresh data or upload new data? Considering these factors will help set the dashboard up for successful use.

The initial testers should be key individuals whose buy-in will be important to garner. By engaging these individuals early, you provide transparency into the process and can integrate their perspectives, so they can champion the prototype's use later. These individuals will likely be:

- lead teachers or department heads,
- coaches,
- school leaders, or
- other educators or leaders whose voices are important to new initiatives.

The first prototype of the dashboard will not be perfect, so it is essential to create something simple and be prepared for feedback. Continue to iterate on the dashboard with users until it has the functionality desired to meet the stated objectives.

Throughout the prototyping phase, give special attention to how users actually interact with the dashboard. Anticipate challenges educators may have and training they may need to use the dashboard effectively.

## Routinely Assess Implementation and Quality

After developing and refining the prototype, consider establishing a team structure that allows regular assessment of the implementation and quality of the tool. A structured approach allows teams to systematically evaluate how the tool is being used and its effectiveness. Frequent evaluation of sample data can provide insights into the way individuals and teams are using the tool, identify emerging trends, and pinpoint barriers in implementation. NIC partners found a quarterly review cadence — to review how the tool is being used and to do a strategic set of empathy interviews with users at the classroom, school leadership, and district levels — allowed them to make timely adjustments to the tool, integration settings, and training plans for team members.

Backward-plan timelines for each of these steps to occur based on the final target roll-out date. In order to train leaders and educators on how to use the tool before school starts in the fall, testing of the tool should be complete by the end of the prior school year.

## Developing with the End User is Essential

The successful development of any new tool or protocol requires its own cycles of improvement. Both **STEM Prep** and **Collegiate Academies** spent approximately a semester getting feedback from users at regular intervals through surveys and interviews, which helped their development teams troubleshoot issues and improve inefficiencies. For example, Collegiate Academies learned that many teachers did not have enough knowledge on how to use Google Sheets for them to create filters on their own. As a result, the team created filters ahead of time for teachers and did not take for granted that teachers could learn how to use Google Sheets on their own. In addition, they designed additional training to increase current and future staff capacity to use Google Sheets independently.

### EXAMPLES OF DATA DASHBOARD TOOLS

*Below: Summit's Rostering Tool includes multiple tabs, which are explained in the **Summit Rostering Task Card**.*

- STEM Prep Grade Book Distribution Dashboard
- Collegiate Academies April Dunn Tracker
- STRIVE Prep Student Conferencing Tracker
- Uncommon Schools Reading Intervention Tracker
- Summit Prep Student Support Block Tool

| | A | B | C | G | H | I | L | M | N | O | P |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | USE PLUS SIGN (+) ABOVE COLUMNS TO EXPAND FOR MORE DETAIL | | | | | | | | | | |
| 3 | Grade | Student Name | Mentor | LC Schedule | Is MLL? | MLL Teacher | Gender | Race | Assignment | Teacher/Room | Mon, 11/6 |
| 4 | 9 | [redacted] | J Barco | | ☐ | | M | Black or African American | Outside- Meet in OLS1 | | |
| 5 | 9 | | J Barco | | ☐ | | X | White | Yoga | | |
| 6 | 9 | | J Barco | | ☐ | | M | Hispanic | Outside- Meet in OLS1 | | |
| 7 | 9 | | J Barco | | ☐ | | M | White | Outside- Meet in OLS1 | | |
| 8 | 9 | | J Barco | | ☐ | | M | Black or African American | Grayson Support | | |
| 9 | 9 | | J Barco | | ☐ | | M | Two or More Races | Outside- Meet in OLS1 | | |
| 10 | 9 | | J Barco | | ☐ | | F | Two or More Races | Outside- Meet in OLS1 | | |
| 11 | 9 | | J Barco | | ☐ | | M | White | Allen Support | | |
| 12 | 9 | | J Barco | | ☐ | | F | Black or African American | Allen Support | | |
| 13 | | | | | ☐ | | | | Grayson Support | | |
| 14 | 9 | | J Barco | | ☑ | | F | Black or African American | Earl Support | | |
| 15 | 9 | | J Barco | | ☑ | Brittany Allen | F | Black or African American | Allen Support | | |
| 16 | 9 | | J Barco | | ☐ | | F | White | Outside- Meet in OLS1 | | |
| 17 | 9 | | J Barco | | ☐ | | M | White | Game Room OLS2 | | |

Marshall Street

# Conclusion

## NAVIGATING DATA FOR MULTI-TIERED SYSTEMS OF SUPPORT

A collection of research-to-impact practices developed with the Networked Improvement Community for Students with Disabilities

# Conclusion

Many schools utilize a Multi-Tiered System of Support (MTSS) — a comprehensive framework that centers individual student needs within the wider scope of instruction, differentiation, behavioral support, and intervention (see the California Department of Education definition) — to meet the variety of needs of their students. When implemented effectively, MTSS empowers schools and networks to meet the needs of every student at their current level. It can be a challenge, though, for schools and networks to utilize the framework effectively. It involves:

- identifying the right data,
- disaggregating data in a way that highlights the students most in need of support,
- creating and executing tiered plans to close the gaps, and
- accurately monitoring the implementation of those plans.

Despite having an immense amount of data at their fingertips, schools often need support in creating the systems and routines that are necessary to ensure their most marginalized students are receiving the support that they need.

Over the course of three years, the Marshall Street Networked Improvement Community (NIC) saw teachers and leaders from 10 participating charter networks implement, study, and adjust various best practices for improving outcomes for Black and Latinx students with disabilities who are experiencing poverty. This collection — itself an outcome of the work these schools have done — describes some of the strongest of these practices, focusing specifically on how the participating schools improved their existing MTSS structures. It highlights three best practices: routine data cycles, student conferencing, and site-based teams. There are also two case studies, one focusing on how network leaders at **Green Dot Public Schools** use data effectively at the network level and another on **STRIVE Prep**'s approach to improving family engagement.

Through their work with the NIC, the participating schools honed their already-present MTSS structures, focusing on making changes that prioritized the NIC's target population and would lead directly to positive outcomes for all students. At **STEM Prep**, introducing a gradebook dashboard to support teachers in monitoring student grades in more frequent data cycles led to an increase in the percentage of students with disabilities who had As or Bs in their classes, from 25% to 81%. Additionally, the dashboard helped improve the experience of all students, as the percentage of students without

disabilities who had As or Bs improved from 49% to 77%. At **Collegiate Academies**, leaders honed a data teaming system that led to huge growth for students with disabilities showing mastery on their statewide graduation readiness projects, increasing from 44% to 92%.

Similarly, using data to effectively implement 1:1 conferences with students yielded promising results. At STRIVE Prep, a special education math teacher piloted student conferences in his math class. Every student with an IEP from that class who conferred with the teacher passed all of their classes. As he expanded the practice beyond just his class, 80% of students with IEPs who participated in these conferences increased their GPA that semester. **KIPP Northern California** also piloted student conferencing for students with disabilities and found that every student who participated increased the number of classes they were passing, and 75% of participating students passed all of their classes. Based on this success, KIPP has built additional periods into their schedule so that special educators can meet with more students to confer.

# Key Takeaways

### THE TYPE AND QUALITY OF DATA THAT SCHOOLS UTILIZE MAKES A BIG DIFFERENCE.

One of the biggest challenges participating schools faced at the start of their work with the NIC was that, although they had an immense amount of student data, including academic, behavioral, and social data, they weren't consistently focusing on the data that would drive impact on student learning and growth. As schools work to improve their MTSS structures, an important first step is to consider what their data tells them and what it doesn't tell them. From there, they can focus on the actions needed to either gather the right information or make a plan to solve for the problems they're seeing.

### SCHOOLS MUST DISAGGREGATE DATA TO BE ABLE TO DESIGN FOR PRIORITY SUBGROUPS.

Disaggregating data, or looking at data for groups of students rather than the whole student population, is an effective way to see which students' needs are not being met by the current system. Too often, schools miss gaps for subgroups, such as students with disabilities, because those gaps don't show up when looking at the school's entire student population. To accurately identify which students need higher-touch support services, schools and networks should ensure that they are examining data across grade levels, schools, and student demographic characteristics such as English language proficiency and special education status.

### ALIGNMENT ACROSS ALL LEVELS ALLOWS THE SYSTEM TO FUNCTION SMOOTHLY.

In order for collaboration between educators to be effective, there must be specific time set aside for deliberate co-planning. Not only that, but the time must be used intentionally to increase access to learning for all students. The collaborating teachers and co-teachers in the NIC found that simply meeting together is not enough. Rather, meeting with a plan and with support led to the growth in practice and student impact that they were looking for.

The United States education system was not intentionally designed to respond to the varying needs of students positioned furthest from opportunity in our society, including Black and Latinx students with disabilities who are experiencing poverty. As a result, year after year, students with disabilities repeatedly underperform their peer groups in schools across the country.[1]

**Multi-tiered systems of support that are designed to fit into the current education landscape, while nominally focused on providing support to all students, frequently miss the mark by focusing on the middle, rather than the edges.**

This collection of practices highlights the important work that members of the NIC did to ensure that their students – all of their students – received the targeted instructional and behavioral support that they both need and deserve. Schools must follow the lead of the NIC participants and begin by asking *which of their students are not being served well by the current system*. The answer will allow them to consider how their practices might change so that every student can succeed.



[1] US Department of Education. "Focus on NAEP: Students With Disabilities and NAEP Assessments." The Nation's Report Card. Accessed March 1, 2024. https://www.nationsreportcard.gov/focus_on_naep/student_groups/#/students-with-disabilities/performance

# Networked Improvement Community

FOR STUDENTS WITH DISABILITIES

The Networked Improvement Community for Students with Disabilities (NIC), a group of 10 public charter school networks serving more than 75,000 students nationwide, identified the best practices through their work between 2019 and 2023.

Led by **Marshall Street** at Summit Public Schools, in partnership with technical assistance providers NIRN, RTI International, SRI International, and SWIFT Education Center, the purpose of the three-year NIC was to systematically improve the way our education system serves Black and Latinx students with disabilities experiencing poverty and share these solutions with school systems everywhere.

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