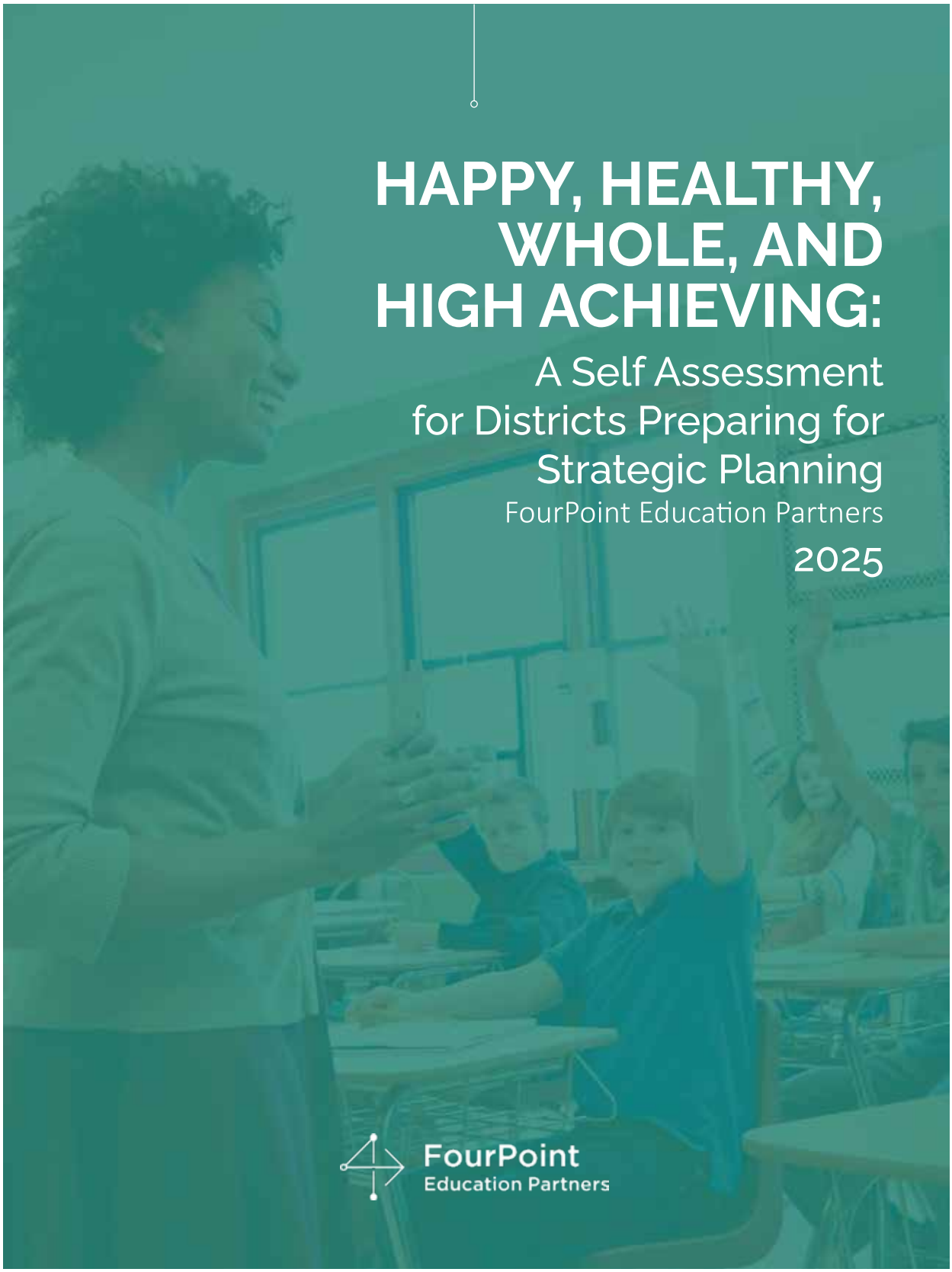


HAPPY, HEALTHY, WHOLE, AND HIGH ACHIEVING:

A Self Assessment for Districts Preparing for Strategic Planning

FourPoint Education Partners

2025

FourPoint
Education Partners

TRANSFORMING OUR EDUCATION SYSTEM

Across the country, education system leaders are working to transform schools to make them more inclusive and dynamic environments that promote learning for all students, regardless of economic background, race, disability, or language of origin. This is a tremendous challenge logistically, emotionally, economically, and—of course—for teaching and learning.

At FourPoint, we also see an urgent opportunity for leaders to revitalize and rehumanize education systems, to increase equity and excellence for all students. Ultimately, we believe, school communities can restore the promise that all students can experience an education that helps them become happier, healthier, whole, and high achieving.

School leaders have shown that they can rise to any challenge. It is now time to press on towards an education system often spoken about but rarely achieved. In these challenging times, we have the chance to be bold. To embrace the uncomfortable. To break long-standing patterns of inequity and to ensure that the needs of every student are met. We also have the opportunity to make space for teachers to take their practice to the next level. Taking bold action starts with being clear about shortcomings in our current education systems.

Educational transformation requires that we refocus on our priorities in a way that better prepares all students for success. We believe that getting to this new normal requires leaders to be crystal clear about what is essential to student success and thinking differently about the role of schools.

To help education leaders plan for this transformation, we offer this planning guide. The guide provides a structure and framework for planning based on the key issues under consideration by leaders across the country, including ensuring student and staff safety and well-being, addressing student learning gaps, and making sure students are prepared for college and careers. It also supports planning for deeper partnerships to expand supports and services required for healthy growth and development. Special attention is also paid to policies and practices, logistics and operations, and strategically aligning and deploying resources. Lastly, the guide is designed to support leaders to promote coherence and innovation throughout with a series of steps that can be followed to accelerate desired changes. We hope you find this guide useful now and into the future.

The FourPoint Team

American education systems have long fallen short for too many students, especially for students of color, students from low-income households, students with disabilities, English learners, and immigrants. Current challenges in the U.S. and across the world—including climate change, pandemics, terrorism and war, technological change, and increasing economic inequality—may exacerbate the learning gaps and opportunities. FourPoint Education Partners believes, however, that these challenges—though overwhelming—present an opportunity for innovation and improvement in education that contributes to students' happiness, health, and achievement. Continuing to educate students in the same way as we have for decades simply does not make sense anymore.

We are in uncharted territory. To ensure that students are happy, healthy, whole, and high achieving, we must start with effective leadership. To help guide leaders through these unprecedented times, FourPoint has created this planning resource, which focuses on eight areas that are key to educational success:

(CLICKABLE LINKS)

1. Ensuring Student and Staff **Safety and Well-Being**
2. Teaching and Learning **Standards-Based Content**
3. Revising and Enhancing Systems to **Prepare Students for College, Careers, and Life**
4. **Deepening Partnerships**
5. Providing High-Quality **Operations** in Support of Schools and Families
6. Strategically Deploying **Staff and Resources**
7. **Innovating** to Promote Excellence and Eliminate Opportunity Gaps
8. Leading for **Coherence and Impact**

By addressing a set of critical questions throughout the guide, leaders can create a clear path forward and capitalize on the need for drastic improvement to accelerate changes they have been working towards at a scale and in a time frame that would have been difficult in the past.

A FEW MORE DETAILS ABOUT THE GUIDE:

- **It prioritizes equity as an explicit goal for all planning work.** We believe this era provides a rare opportunity to press forward on the goal of promoting equity and excellence for all students.
- **It is designed to complement existing strategic plans** by building on an articulated vision for student success and taking advantage of improvement strategies already underway.
- **It is intended to promote coherence in district systems**. While each component of the tool can be used independently, there is clear overlap and interdependencies across components that also must be considered.
- **Each of the components, while following the same format, differs in the level of detail for key questions**. This was done intentionally both to promote needed conversations and to acknowledge that some areas may require more attention than others.
- **There has never been so much uncertainty in the education system**; it is almost guaranteed that initial plans will need to be reviewed and adjusted along the way. This Guide can be used as part of any continuous improvement process to facilitate innovation and improvement through rapid cycle review and adjustment.

HOW TO **USE THIS GUIDE**

The tool is designed to be used by a district leadership team that includes the cabinet and other senior leaders needed to inform planning across district systems. It also may be helpful to include one or more school leaders, family liaisons, and partnership managers in relevant conversations. The work of the tool falls into four phases:

1 - Establish Goals and Parameters for Planning: The planning team reviews the tool together and identifies the district's non-negotiables for moving forward that will inform on-going conversations. At this point, leaders will review the district's strategic plan to support alignment and build coherence with needs and goals.

2 - Complete the Tool: This can be done by the planning team or by establishing sub-committees (with at least one member of the planning team on each subcommittee) to work through the sections of the tool. Here, other staff and partners can be tapped to develop a fuller picture of what reentry and recovery will involve for each key area.

3 - Create the Plan: Once the questions in the tool have been answered, the planning team reconvenes to review and develop a plan. Here, the team will look for ways to promote efficiencies across areas; to support the non-negotiables; and to facilitate their envisioned system. The plan will also identify roles and responsibilities, a timetable for action, alternative scenarios, and performance measures.

4 - Monitor and Adjust: With so much uncertainty, regularly reviewing and revising the plan will be essential for success. The Planning team will meet often to review progress, address emerging issues and make any needed adjustments to the plan based on early implementation.

This process is designed to provide a flexible, integrated, and coherent plan. The suggested subcommittee structure can be used to engage a wider group of stakeholders to build buy-in and support for the plan moving forward. It will also be helpful to create a "parking lot" for issues raised during planning that will need attention further down the road.

Page 4 of this guide includes a checklist of questions to promote equity, excellence, and coherence to which leaders can refer. We recommend keeping a copy of this checklist handy as you work through each section of the tool and when creating new programs or policies. Finally, it is important to acknowledge that this planning work is likely to push many people outside of their comfort zones. Leaders will need to help the team to "get comfortable with being uncomfortable" if they are to take full advantage of this moment to create a new, more equitably and effective education system.

CHECKLIST TO PROMOTE **EQUITY, EXCELLENCE & COHERENCE**



- [ ] Does this strategy/activity/program/practice promote equity? Who benefits from the change? Who is left out?



- [ ] Does this strategy/activity/program/practice create an opportunity for transformation for the district? Does it support district non-negotiables?



- [ ] How does this strategy/activity/program/practice support our special populations—English learners, students with disabilities, and students without stable housing?



- [ ] Has the strategy/activity/program/practice been tested with those who will be affected—central office staff, principals, teachers, other building staff (custodians, social workers, etc.) to get input and feedback?



- [ ] What costs are associated with the strategy/activity/program/practice? Is this an effective use of resources?



- [ ] How will we know this strategy/activity/program/practice is working? What data needs to be collected?

COMPONENT ONE

ENSURING STUDENT AND STAFF **SAFETY AND WELL-BEING**



CONTEXT

Educators across the U.S. recognize the need to support students' and staff well-being and social-emotional health. This well-being begins with safety from intruders, weapons, and natural disasters, and also includes prevention of fighting, bullying, alcohol and drug, and unsafe use of social media.

Well-being also involves student and staff mental health. Some teachers have begun to infuse social-emotional learning practices into their daily lessons, scheduled regular check-ins, and sent messages home to express their hope and care. For many students, however, that may not be enough. Research suggests that students and educators experiencing trauma from loss of loved ones, economic instability, food instability, social isolation, or other crises overwhelms their ability to cope, causes feelings of helplessness, and diminishes their sense of self, as well as their ability to feel the full range of emotions and experiences.

Trauma affects everyone differently. Most children eventually return to their typical functioning if they receive consistent social-emotional support from sensitive and responsive teachers and caregivers. Others, however, are at risk of developing significant trauma-related stress, anxiety, and depression. Children with prior trauma or pre-existing mental, physical, or developmental challenges—and those whose parents struggle with mental health disorders, substance misuse, or economic instability—are at especially high risk for emotional trauma. Many of our children of color, children of poverty, English learners, and children with special needs meet these high-risk criteria.

COMPONENT ONE

CRITICAL ACTIONS FOR PLANNING

School leaders should carefully consider the status of students' and teachers' social and emotional well-being as they plan for large-scale improvement. A plan must include both universal social-emotional learning practices and trauma-informed care. Planning should address the following critical actions:

1 - Ensure the physical safety of all students and staff. Districts should conduct regular assessments of their facilities and update emergency plans as necessary.

2 - Understand trauma-informed social-emotional learning (SEL) practices. Trauma-informed SEL is an approach to fostering youths' social-emotional development that seeks to create a safe and reliable environment and provides access to the mental health supports they need. Practices are built around educators' self-awareness of how traumatic stress may affect students' behaviors and emotions in the classroom.

3 - Focus on adult well-being. Teachers are among the most important adults in the transition and recovery of students impacted by community crisis. If schools promote the well-being of teachers, this will have a trickle-down effect on students' sense of safety and support.

4 - Create emotionally safe environments. Equitable practices should aim to build strong and supportive relationships for both students and staff, embrace students' identities, empower students' agency, and reduce stress and anxiety.

5 - Integrate trauma-informed social-emotional learning practices. Curricula should include instructional tasks that affirm students' identities, provide a sense of agency, lead students to share about their lives and backgrounds, engage in conversations to understand the perspectives of others, and guide students to self-regulate emotions.

In recent years, educators have increasingly thought about and introduced curriculum and practices to better attend to the social-emotional needs of students. The current crisis has made it abundantly clear that these needs must be prioritized, and that students' and families' needs vary by circumstances. Districts can make progress in their focus on equity by continuing to bring these practices off the sidelines and into the core work. Heightening the awareness and understanding of educators, districts can strengthen relationships within the school community and with families and other essential partners.

INDICATORS COMPONENT ONE	RATING 1 = NOT EVIDENT 2 = IN PROGRESS 3 = FULL IMPLEMENTATION
1 - ASSESSMENT	
a. District regularly evaluates the physical safety of its schools, students, and staff.	
b. District evaluates how educators have supported the social-emotional health of students and teachers.	
c. District assesses the culture and climate of schools.	
2 - PLANNING	
a. District updates school emergency plans as necessary.	
b. District and schools regularly update plans for improving school culture and climate.	
c. District provides guidance for teachers to examine the social-emotional wellness of their students.	
d. District has determined and communicated the goals and objectives to address the social-emotional needs of teachers and students.	
e. District and school leaders have a plan to integrate trauma-informed, social-emotional strategies.	
f. District has engaged with community partners to plan and coordinate additional wraparound support for students who need it.	
g. District and school leaders have clear plans for implementing Tier 2 and 3 behavioral interventions.	
3 - TRAINING AND SUPPORT	
a. District provides training and support to implement emergency plans.	
b. District provides teachers with training and support to address common signs of student trauma.	
c. District provides training on trauma-informed, social-emotional learning.	
d. District has developed and implemented schedules, interventions, and protocols to strategically balance time spent on core instruction and activities to support the social-emotional health of students and teachers.	
4 - MONITORING AND CONTINUOUS IMPROVEMENT	
a. District monitors the evolving threats to schools, students, and staff and makes adjustments as necessary.	
b. District monitors student and teacher emotional wellness to identify those who may need additional support.	

NOTES

(USE THIS SPACE TO NOTE YOUR KEY TAKEAWAYS AND ANY OTHER ISSUES, CHALLENGES, AND SUGGESTIONS TO INFORM AND SUPPORT PLANNING. ALSO NOTE STAFF RESPONSIBILITIES FOR TASKS IN THIS DOMAIN.)

SAFETY AND WELL-BEING

1 - WHERE ARE WE RIGHT NOW?

2 - WHAT NEEDS TO HAPPEN NEXT YEAR?

3 - WHAT NEEDS TO HAPPEN IN THE FUTURE?

COMPONENT TWO

TEACHING AND LEARNING
STANDARDS-BASED CONTENT

CONTEXT

For decades, overall student outcomes in the U.S. remained stagnant with large achievement gaps between White and Asian students on one hand and low-income students, Black and Brown students, students with disabilities, and English language learners on the other hand. These unacceptable outcomes got even worse during the Covid-19 pandemic, which reduced students' learning time and wreaked havoc on their lives.

Continuing the same practices that have created low achievement and significant gaps in achievement simply makes no sense. School systems need to decide how they will transform teaching and learning through relationships and engagement, use of technology, and high-impact instructional and assessment strategies. We suggest a close examination of the systems that have long contributed to inequity and reimagining ways to eliminate opportunity gaps and create equitable systems for all students. Research-based practices—including structured literacy, guaranteed and viable curricula, high-impact instructional strategies, teacher coaching and collaboration, and multi-tiered systems of support—must be implemented, monitored, and continuously improved.

COMPONENT TWO

CRITICAL ACTIONS FOR PLANNING

To effectively begin the planning process and stay grounded in the instructional core, we suggest taking critical actions that support how students and teachers engage with the content through investments in teacher quality and professional development, a system of balanced assessments to inform student placement and teacher practice, as well as digital technology to support flexible instructional delivery models.
Planning should address the following critical actions:

1 - Use balanced assessment aligned with high-quality curriculum.

Students may need to access more than a single grade level of content in a single school year, which means teachers need quick information on the size of learning gaps. Systems should examine existing data and administer a no-stakes diagnostic assessment so teachers and students can begin effective planning for both the summer and the upcoming school year. Then use this information to develop individual learning pathways that allow for simultaneous acceleration and remediation as needed. Diagnostic, formative, and benchmark/interim assessments should be used as tools to inform teacher practice, drive instruction and learning and focused feedback, and inform personalized learning experiences.

2 - Ensure teacher quality.

Several steps should be considered:

- Increase professional development and planning time to enable teachers to plan differentiated student supports.
- Provide for collaborative planning time to interpret and use formative assessment data across teacher teams.
- Review March- June curriculum to identify the essential standards and requisite subskills.
- Distribute content-area expertise of teachers to best support students with greatest needs.
- Develop 30-60-90-day assessment cycles.
- Create units of study to review the essential ELA and math skills that spiral across the standards from grade level to grade level.
- Provide professional development opportunities that allow teachers to use student performance data to determine instructional focus and progress monitoring.

CRITICAL ACTIONS FOR PLANNING

3- Define instructional delivery and tiered intervention models. Extended learning and delivery options and alternative academic schedules should be considered. Existing school days and calendar years should be revisited to extend opportunities for instructional time for review, re-teaching, and reassessment of both missed and current grade-level content. Options to consider include a reduced or staggered schedule to accommodate smaller class sizes for ongoing social distancing, extended day, extended year, Saturday school, summer school, year-round school, and bridge programs. Schools and districts should design flexible master schedules to address student needs and mixed ability grouping (including multi-age/ multi-level classroom structures) and time allocations matched with the needs of students.

4- Define and implement comprehensive, research-based approaches to serving students with disabilities and English language learners. Districts and schools need to be clear about the use of practices related to inclusion and co-teaching and ensure that educators have the skills to implement them successfully.

5- Make use of digital alternatives. Districts and schools should plan for a blended learning approach that incorporates online educational materials with the classroom, allowing for student control (pace) and student voice (path) of their learning. Technology investments should be used to accelerate a blended model that allows students to access technologies to support and enhance classroom instruction. This is an opportunity to rethink what school "looks like'' and "feels like'' as we create a personalized student experience that meets the demands of the times, but also serves to create a new vision for teaching and learning that is grounded in responsive supports and practices that promote the physical, emotional, social and academic well-being of the students we serve, guaranteeing that every student has the necessary resources and tools to meet with individual success.

INDICATORS COMPONENT TWO	RATING 1 = NOT EVIDENT 2 = IN PROGRESS 3 = FULL IMPLEMENTATION
1 - CURRICULUM AND ASSESSMENT	
a. District has a high-quality curriculum aligned with the State assessment.	
b. District has regularly scheduled formative assessments used by all classrooms and aligned with the curriculum.	
c. District and/or schools monitor curriculum implementation.	
2 - DATA USE	
a. Teachers and administrators have access to formative assessment data.	
b. District supports teachers and administrators in using results from ongoing assessments.	
c. Teachers and administrators use data to plan instruction.	
d. Teachers and administrators use data to make instructional placement decisions (e.g., re-grouping, tiered interventions, summer programs).	
3 - TEACHER QUALITY	
a. Teacher assignment is based on expertise and equitably distributed and matched to highest areas of need.	
b. District and schools take a comprehensive approach to professional learning for teachers.	
c. Teachers have time during the school day to collaborate for planning, professional learning, and assessment of student needs.	
d. Teachers regularly receive feedback about their instructional practice.	
4 - INSTRUCTION AND TIERED INTERVENTIONS	
a. District has developed guidance for schools offering schedules and protocols to balance time spent on core instruction and activities to support and bridge missed content.	
b. District master calendars provide for extended learning time.	
c. School-based master schedules include collaborative time for teacher teams to plan for instruction, provide for smaller class sizes, and allow for flexible grouping across grade levels and content areas.	
d. District and school leaders have determined Tier 2 and Tier 3 academic interventions for students who need them.	
e. Teachers use high-impact instructional strategies.	
f. Teachers effectively use Tier 2 and Tier 3 academic interventions.	
g. Elementary teachers use a comprehensive approach to structured literacy.	
h. Teachers across all grades support students' improved literacy.	
i. Teachers implement tiered interventions to support students most in need of academic and behavioral supports.	

INDICATORS COMPONENT TWO	RATING 1 = NOT EVIDENT 2 = IN PROGRESS 3 = FULL IMPLEMENTATION
5 - APPROACH TO SERVING STUDENTS WITH DISABILITIES AND ENGLISH LANGUAGE LEARNERS	
a. Schools implement a comprehensive research-based approach to educating students with disabilities.	
b. Schools implement a comprehensive research-based approach to educating English language learners.	
c. The district and schools have adequate resources—including properly trained educators and paraprofessionals—to serve students with disabilities and English language learners effectively.	
6 - INSTRUCTIONAL TECHNOLOGY	
a. District has investigated instructional technology interventions to support blended learning models.	
b. Blended learning models are used in classrooms.	
c. District has conducted an instructional technology audit to ensure that the right systems are in place to support blended learning.	

NOTES

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STANDARDS-BASED CONTENT

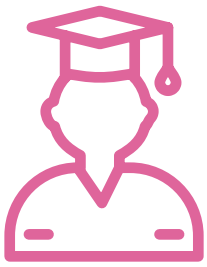
1 - WHERE ARE WE RIGHT NOW?

2 - WHAT NEEDS TO HAPPEN NEXT YEAR?

3 - WHAT NEEDS TO HAPPEN IN THE FUTURE?

COMPONENT THREE

REVISING AND ENHANCING SYSTEMS TO **PREPARE STUDENTS FOR COLLEGE, CAREERS, AND LIFE**







CONTEXT

Definitions of college, career, and life readiness are in flux. States are issuing waivers for high school testing, graduation requirements, and college entrance exams. The post-secondary landscape is unclear: Higher education, workforce, and military options present new navigation challenges.

"Melt" periods — including summer — are traditionally challenging for students without support for completing final preparatory steps towards their postsecondary plans, sometimes by simply not turning in needed paperwork but also often due to financial shortfalls for costs like housing deposits. Districts need to understand how best to support current high school seniors through graduation and into an early and extended melt period, with a significant need for bridge programming to guide students and graduates through college and career options.

COMPONENT THREE

CRITICAL ACTIONS FOR PLANNING

With this rapidly changing landscape, school districts must receive timely communications from key agencies and institutional partners and communicate regularly with staff, students, families, and partners. Planning should address the following critical actions:

1 - Determine staff members responsible for gathering up-to-date information from the state department of education and higher education commission, colleges, universities, and postsecondary training organizations.

2 - Establish mechanisms for ongoing dissemination of up-to-date information and resources regarding graduation requirements and postsecondary options that are effective in reaching staff, students, and families.

3 - In collaboration with students and families, develop individual academic and career plans for students that incorporate their interests, current academic standing and social-emotional well-being, and next steps and resources to pursue viable post-secondary pathways, accounting for the current circumstances.

4 - Identify opportunities to revolutionize how college, career, and life readiness efforts are typically handled by districts, using a holistic approach that better leverages technology resources and cuts across departments and community partners, promoting greater equity for all students.

INDICATORS COMPONENT THREE	RATING 1 = NOT EVIDENT 2 = IN PROGRESS 3 = FULL IMPLEMENTATION
1 - GRADUATION REQUIREMENTS	
a. District updates and communicates changes to graduation requirements based on state guidelines and local decisions.	
b. District understands and communicates student requirements and expectations of in-state colleges and universities.	
c. District communicates updates related to changes in graduation and post-secondary requirements to students, families, partners, and other key stakeholders.	
d. District has identified students who are most at risk of failing to meet graduation requirements in a timely manner.	
2 - CAREER AND TECHNICAL EDUCATION	
a. District has robust career and technical education programming that all high school students can access.	
b. CTE programming is organized in high-demand career clusters.	
c. District provides rigorous, hands-on learning opportunities for students at all grade levels.	
d. Students have the opportunity to explore career options in a meaningful way.	
e. Adjusted its career and technical education programming appropriately accommodating hands-on learning needs for each career cluster and program.	
3 - PARTNERSHIPS	
a. District engages with students and families to support students' needs and planning for the future.	
b. District has a robust set of partnerships with local and regional colleges and universities for dual enrollment, advance coursework, and other opportunities for students.	
c. District has a robust set of partnerships with local and regional employers for internship, mentorship, career advisement, and other opportunities for students.	
d. District assesses student and family engagement and coordination with partners to support students' needs with targeted outreach to those who may be disconnected.	
4 - COUNSELING	
a. High schools have robust counseling programs that advise students on college and career options.	
b. Counselors have a caseload of 400 students or less.	
c. Counselors engage students across the entire preparedness spectrum—from those who are most at risk of school failure to the highest performers.	
5 - MONITORING	
a. District monitors high school seniors' postsecondary plans and progress towards them, identifying areas of need, and ensuring that they have the information and support for financing their plans.	
b. District monitors the success of recent high school graduates. how to maintain communication with graduates.	

NOTES

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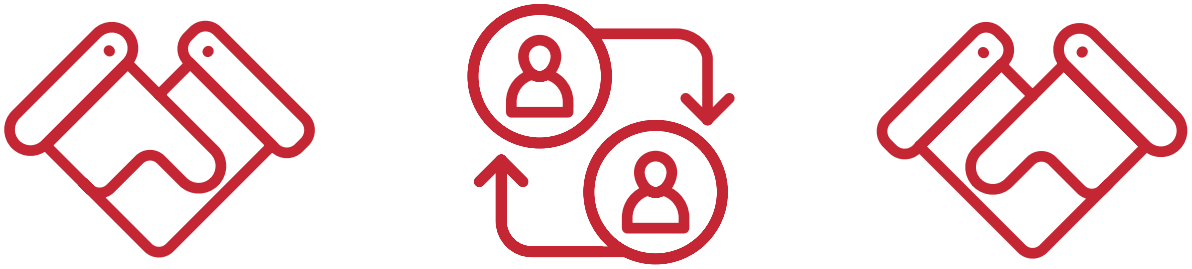
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COMPONENT FOUR

DEEPENING PARTNERSHIPS



CONTEXT

In many communities, schools play a critical role in ensuring that students and families have access to essential services. In these communities, the value of working with community organizations and parents is clear. Nowhere has this been more obvious than in the provision of food. Across the country, schools and their partners deliver essential meals to families who might otherwise be doing without, especially during times of crisis.

While many schools welcome partners into their buildings to provide out-of-school programming, those schools and districts that have created multidimensional systems for partnering with parents and community groups have an enhanced capacity to connect with and support students and families. For instance, anecdotal information suggests that established community-based partners are helping districts to locate and connect with their most vulnerable students; to provide social, emotional, and health supports; and to identify needs as they emerge. In many places, trusted partners also provide a bridge to parents by relaying needs and concerns back to school and district leaders. Partners can also be helpful in defraying costs like transportation, especially in large geographical locations.

COMPONENT FOUR

CRITICAL ACTIONS FOR PLANNING

Partnership planning should address the following critical actions:

1 - Update the list (database) of key community partners and include information on how they can support students and families. On the district and/or building side, designate a person or office to serve as the primary point of contact for work with partners.

2 - Establish communication systems for work with partners. Partners need to know what is happening at the district and need to have a clear process for sharing what they are learning and doing to better align with district supports and plans.

3 - Identify how partners can deploy their resources to help moving forward. For instance, an afterschool provider may have a distance learning platform that can help support summer school. Likewise, early care and after-school providers can be critical partners in ensuring students have a safe place to be when parents are working — especially if schools are operating on reduced schedules.

4 - Identify opportunities for partners to create a more integrated support system for students. Leaders can consider roles partners can play in expanding on-line and blended learning systems; how out-of-school programs can better support classroom learning; and what resources — including professional development — can be shared with or open to partners.

5 - Identify opportunities for partners to reduce district costs in areas such as transportation, health care, and maintenance.

INDICATORS COMPONENT FOUR	RATING 1 = NOT EVIDENT 2 = IN PROGRESS 3 = FULL IMPLEMENTATION
1 - IDENTIFICATION OF PARTNERS	
a. District has a clear picture of who their partners are, what services they provide, which schools they serve, and which partners are trusted by parents.	
b. District has identified other partners that they would like to work with more closely to address strategic needs.	
c. District works with partners to target additional outreach to those who may be disconnected.	
2 - PROCESSES FOR ENGAGING PARTNERS	
a. District makes family engagement an explicit shared priority for staff and partners.	
b. District has established goals and objectives for working with families and partners that align school-provided SEL and core curriculum with partner supports and services.	
c. District designates personnel at the central office and at each building to serve as the point person for partners.	
d. District coordinates with partners to tap funding to support urgent family and student needs.	
e. District works with partners to enhance out-of-school opportunities for students, especially to address learning gaps.	
f. District has processes and structure for sharing data with partners.	
g. District has processes and actions for engaging partners around fundraising for key needs.	
h. District has processes for deepening and expanding partnerships and family engagement.	
i. District communicates about partnerships to staff and families.	
3 - ONGOING MONITORING OF PARTNERSHIPS	
a. District closely monitors student and family engagement.	
b. District and partners have reviewed current practices and agreed to accountability measures for working together.	

NOTES

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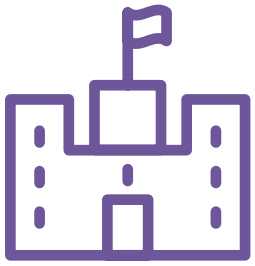
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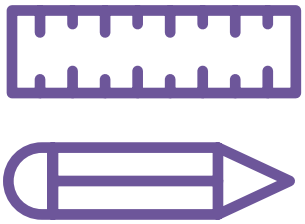
2 - WHAT NEEDS TO HAPPEN NEXT YEAR?

3 - WHAT NEEDS TO HAPPEN IN THE FUTURE?

COMPONENT FIVE

PROVIDING HIGH-QUALITY **OPERATIONS** IN SUPPORT OF SCHOOLS AND FAMILIES





CONTEXT

The logistics of running a school system can be a daunting task. On a typical day, districts must provide students and staff with clean and safe facilities, transport and feed students, and ensure they have access to the latest technology in working order. These tasks become even more daunting during a crisis, such as a hurricane or pandemic. Moreover, while administrators must be prepared for these crises, they often face uncertainties related to budget, student enrollment, staffing, and politics that make long-term planning difficult.

COMPONENT FIVE

CRITICAL ACTIONS FOR PLANNING

Operating schools in the service of their communities requires leaders to face difficult tradeoffs. Of course, planning must also consider each district's physical infrastructure and other aspects of operations—transportation, food service, etc. — along with budgetary constraints. The following critical actions can help to guide planning for high-quality logistics and operations:

1- Be clear about priorities. Districts must forecast enrollment trends and understand the needs and interests of their students and communities. At the same time, districts must live within budget constraints and know that they can't necessarily effectively do everything that a community wants.

2- Have a clear plan for maintaining health and safety. This includes crises—such as pandemics, weather events, and violence—but also day-to-day aspects such as traffic patterns, food quality, and clean facilities.

3- Engage partners — in city government, local non-profits, businesses, and families — to create solutions that maximize benefits for students and families. For instance, city officials might be able to open recreation centers to extend space and local businesses may be able to adjust work schedules to help make new school schedules workable for families.

INDICATORS COMPONENT FIVE	RATING 1 = NOT EVIDENT 2 = IN PROGRESS 3 = FULL IMPLEMENTATION
1 - ASSESSMENT AND IMPROVEMENT	
a. District has a clear picture of strengths and weaknesses of current operations, including technology, transportation, communications, and human resources.	
b. District has metrics for assessing progress in improving logistics and operations.	
c. District consistently tracks data related to key metrics.	
d. District evaluates programs and operational improvements.	
e. District monitors enrollment trends to plan for changes.	
2 - FACILITIES	
a. District takes inventory of building space to assess capacity, cleanliness, and maintenance.	
b. District identifies additional ways to use local space near schools to increase the number of students who can participate in extended learning and recreational activities.	
3 - OPERATIONAL EFFICIENCY	
a. District identifies potential partners to help reduce costs and increase efficiencies.	
b. District considers if/how it can reorganize staff to operate in a more coordinated and integrated fashion. Staff roles and responsibilities are adjusted and clarified to meet new demands.	
c. District tracks new federal and state flexibilities and identified opportunities to leverage them to support in-school and out-of-school learning.	
d. District monitors operations and facilities broadly to look for opportunities to operate more efficiently.	
3 - ENGAGEMENT	
a. District has up-to-date contact information for all students, families, and staff.	
b. District implements and monitors a plan for communicating schedules and schedule changes with families and staff.	
c. District engages staff, families, and community in ongoing planning and strategy development.	

NOTES

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COMPONENT SIX

STRATEGICALLY DEPLOYING **STAFF AND RESOURCES**



CONTEXT

District budgets always seem to be stretched in the present and uncertain in the future. State budgets, which typically comprise the largest share of education funding, are often victims of politics, short-term economic cycles, and crises. Additionally, districts frequently incur unexpected costs associated with emergencies (e.g., hurricanes, pandemics, violence), immigration, increasing learning and health needs among students, and new technologies. Finally, pension requirements will put additional stress on budgets as current teachers retire. Federal stimulus and private funding can help but are generally unreliable and unlikely to make up for the need for sustainable adequate funding.

COMPONENT SIX

CRITICAL ACTIONS FOR PLANNING

In responding to uncertain and sometimes inadequate resources, districts can adopt a strategic approach to financing. Rather than slashing budgets across the board by a set percentage, districts can ensure funds are available for key priorities; use a return-on-investment mindset to identify where investments should be maintained or cut; and involve stakeholders both from the district and the community in decisions about where cuts should be made. As budgets are reconceived, there is also an opportunity to distribute funds more equitably by prioritizing highest need schools and students when allocating funding as well as in the redesign of classes and classrooms.

Planning should address the following critical actions:

1 - Revise budgets for the current school year to reflect expenditure and revenue changes that have already occurred. Once that is done, the focus can shift to revising projections for the following school year to reflect new expenditure targets and revenue projections.

2 - Identify flexibilities in federal and state rules that allow districts to use funds differently.

3 - Track grant funding carefully. District leaders can create plans for how these temporary funds can be used that will meet urgent needs while minimizing a funding cliff when funds expire.

4 - Engage school leaders in decision-making to ensure school and district goals are met. This is especially true in districts that provide significant autonomy to principals over budgeting and staffing.

INDICATORS COMPONENT SIX	RATING 1 = NOT EVIDENT 2 = IN PROGRESS 3 = FULL IMPLEMENTATION
1 - BUDGETING	
a. District engages its community in budget development.	
b. District uses student weighted budgeting to ensure equity across its schools.	
c. District creates financial scenarios to understand the cost implications of various plans. Scenarios show how resources will support students with the greatest needs.	
d. District has a clear process for monitoring and adjusting to revenue changes for next year.	
e. District identifies planned expenses that can be delayed as necessary.	
f. District identifies and implements cost-saving strategies.	
2 - RESOURCE ALLOCATION	
a. Resources are allocated so that schools serving the neediest students receive the most resources.	
b. District monitors how resources are flowing to schools and student groups.	
c. District revises resource allocations as necessary to ensure equity.	
3 - STAKEHOLDER ENGAGEMENT	
a. District provides training to and engages the community in budget development for the next year.	
b. District engages budget officials in instructional and programmatic planning and strategy development	
c. District communicates to staff and the public about budget changes and outlook.	
d. District coordinates with partners to tap all local emergency funding.	
4 - CONTINUOUS IMPROVEMENT	
a. District carefully monitors fund balance and processes for allocating funds for urgent needs.	
b. District tracks new federal and state flexibilities and identifies additional opportunities for financial relief.	
c. District evaluates and updates fiscal scenarios as new information becomes available.	
d. District monitors operations and seeks opportunities for efficiencies.	

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COMPONENT SEVEN

INNOVATING
TO PROMOTE EXCELLENCE AND ELIMINATE OPPORTUNITY GAPS



CONTEXT

The use of new technologies is an example of innovation that has tremendous potential (and plenty of risks) for transforming education. School districts must work to stay up to date on technologies to support student learning and operational efficiencies. But frequently overlooked as innovation is the practice of experimenting or "trying things" when there is a lack of knowledge about the correct path forward. In this sense, innovation is not necessarily technology related or even new, it is a crucial component of the continuous improvement process that helps us identify best practices in an area without a strong research base.

For example, we know how to teach young children to read: structured literacy has decades of research demonstrating its efficacy. This is NOT an area that schools should innovate other than at the edges of implementation. On the other hand, principal development—although there are certainly best practices—has no single approach that has been found to outperform all others. Consider a district that needs to develop many high-quality principals quickly and doesn't have the capacity to do so by itself. Such a district might partner with multiple providers—each with a different approach and cost structure—to develop future school leaders. Each partner will take a different approach and produce variable results.

This is an example of innovation if the district learns from this experiment by establishing indicators of effectiveness, assessing each principal development program against these indicators, and then making decisions about how to move forward.

COMPONENT SEVEN

CRITICAL ACTIONS FOR PLANNING

As district teams manage a multitude of rapidly changing needs and circumstances, an important foundation for ensuring innovation and continuous improvement is using the Plan-Do-Study-Act (PDSA) cycle, an iterative management approach. This tool will help district teams apply the PDSA approach across all critical domains to improve systems and processes, resulting in better outcomes for students.
Critical actions include:

1 - Plan. Decide what you are trying to accomplish by establishing clear objectives, then determine the approaches and processes your team will take to reach your goals.

2 - Do. Implement the plan. Small changes are usually tested and then data is gathered to assess the effectiveness of the change.

3 - Study. Evaluate the data and results from the Do phase to see how close they come to the hoped-for result. Also consider whether any adjustments should be made to the evaluation tools.

4 - Act. Improve the process. Records from the do and study phases help identify issues with the process. Root causes of such challenges are investigated, found, and eliminated through modifications. At the end of the actions in this phase, the process has better instructions, standards, or goals. Planning for the next cycle can proceed with more information and know-how.

Applying the PDSA approach will help district teams ensure they attend to the critical issues of educational equity and make the adjustments needed to improve outcomes for all students.

INDICATORS COMPONENT SEVEN	RATING 1 = NOT EVIDENT 2 = IN PROGRESS 3 = FULL IMPLEMENTATION
1 - TECHNOLOGY	
a. District reviews key policies, systems, processes, and practices related to technology and innovation.	
b. District considers the needs and experiences of its most under-served students.	
c. District has a clear plan and timeline for renewing technology.	
d. District has a process for considering benefits of new technologies.	
2 - CONTINUOUS IMPROVEMENT	
a. District systematically pilots, evaluates, and scales (as appropriate) new initiatives.	
b. District creates multi-stakeholder teams to assess implementation and impact of initiatives, revise processes as necessary, and scale or end initiatives as appropriate.	
c. District reviews recommendations from teams and responds appropriately.	
d. District clearly defines and communicates processes and administrators' job responsibilities for all new initiatives.	
e. District reports to the board and the public about successes and challenges of initiatives.	

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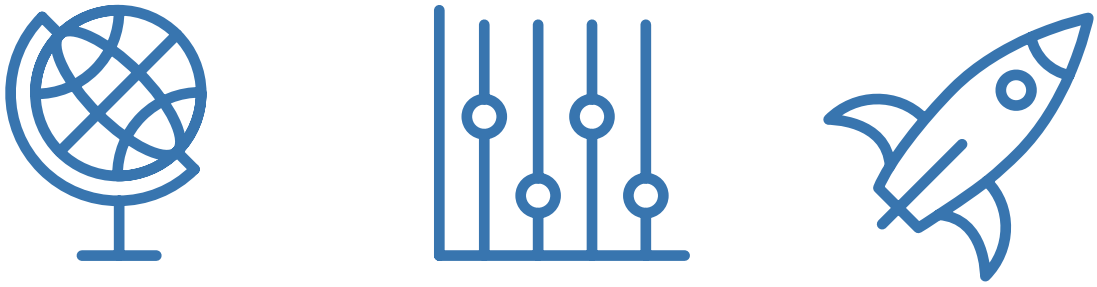
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COMPONENT EIGHT

LEADING FOR **COHERENCE AND IMPACT**



CONTEXT

Systemic coherence occurs when a school system aligns its resources, systems, structures, and culture with a clear strategy and theory of action, all focused on increasing student achievement and eliminating achievement gaps. A district's theory of action can be thought of as existing on a continuum of school management approaches. At one end of the continuum—a "centrally managed" approach—the central office controls many inputs required for an excellent education, including hiring of staff, resource allocation, curriculum and assessment, and professional development. At the other end of the continuum—a "school-based management" approach—the central office empowers schools to make most decisions related to how and by whom an excellent education is delivered to students.

Although there is no "correct" position, research finds that districts must be purposeful in identifying their placement on the school-management continuum and then make decisions related to central-office organizational structure and staffing, systems, use of resources, and school-improvement strategies that are consistent with their selected approach.

COMPONENT EIGHT

CRITICAL ACTIONS FOR PLANNING

School systems have three mechanisms to work towards coherence:

1 - Define a clear theory of action for school improvement by defining a discrete number of "non-negotiables" for all schools. Some non-negotiables that FourPoint typically recommends:

- Fidelity to a guaranteed and viable curriculum as measured by common formative assessments of student learning and classroom observations
- A consistently implemented approach to structured literacy in early grades
- Fidelity to the system's approach to multi-tiered systems of support (MTSS)
- High-quality professional learning communities or instructional leadership team meetings at every school

2 - Support schools by leveraging the district's principal supervisors to enhance principals' instructional leadership and hold principals accountable for continuous improvement focused on implementing the non-negotiables.

3 - Manage performance of schools, by defining and tracking valid measures of implementation of defined non-negotiables.

INDICATORS COMPONENT EIGHT	RATING 1 = NOT EVIDENT 2 = IN PROGRESS 3 = FULL IMPLEMENTATION
1 - THEORY OF ACTION DEFINITION	
a. With input from principals and educators, district defines a clear theory of action by defining non-negotiables that all schools are to implement with fidelity.	
b. Non-negotiables are clearly embedded in, and the focus of, school improvement plans.	
c. Principals have a clear understanding of non-negotiables and related expectations.	
d. Principal supervisors understand job responsibilities focused on supporting schools' implementation of non-negotiables.	
2 - THEORY OF ACTION IMPLEMENTATION	
a. District clearly communicates non-negotiables and implementation expectations.	
b. District provides training and support related to the non-negotiables.	
c. Principal supervisors work consistently with principals and school leadership teams to support implementation of non-negotiables.	
3 - CONTINUOUS IMPROVEMENT	
a. District has a collaborative process in place for monitoring implementation and impact of non-negotiables.	
b. Principal supervisors work collaboratively with principals to adjust processes to improve implementation of non-negotiables.	
c. District reviews data to identify best practices related to non-negotiable implementation.	
d. School leaders learn about best practices taking place across the district.	
e. With support from principals and educators, district adjusts non-negotiables, supporting documents, and coaching and support for principals as it learns more about the implementation and impact of non-negotiables.	
f. Principal supervisors share best practices, tracking implementation and impact, and coaching principals in support of non-negotiables.	
g. Student outcomes improve as a result of effective implementation of non-negotiables.	
h. District communicates effectively with board and community about implementation and impact of non-negotiables.	

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PUTTING IT ALL TOGETHER: **KEY TAKEWAYS**

Having considered the critical factors above, use the space below to note your reflections on each phase.

Closing out the School Year

What are the most critical lessons we have learned this year?

As we close out the school year, in what ways might we need to shift our priorities?

Having considered the critical factors above, use the space below to note your reflections on each phase.

Preparing Next Year

Which areas need our greatest attention for next year to be successful?

What are the key adjustments we need to make to attend to these areas?

Having considered the critical factors above, use the space below to note your reflections on each phase.

Planning for the Future

Which areas call for us to reimagine and reinvent how we educate students?

How might we dedicate some bandwidth toward this reimagination and reinvention?

Acknowledgments

This guide was developed by FourPoint's Rudy Ruiz, Sharon Deich, Scott Joftus, and Connie Wehmeyer and the Valbrun Consulting Group's Valda Valbrun. It is based on our collective experience supporting school districts to plan and execute coherent plans for improving equity and improvement. It is our hope that this guide will be a resource for you to rally the leadership team and partners around a plan for reentry and recovery that stays true to your goals.



FourPoint
Education Partners

FourPoint Education Partners empowers education and community leaders by helping them strengthen school and system capacity to promote success for every student. We help leaders create and refine opportunity ecosystems, aligning and coordinating resources and programming to close opportunity and achievement gaps, promote equity and ensure all young people are ready for life after graduation. Sometimes this work happens in schools, where we help leaders create productive and sustainable partnerships with community-based organizations. Other times we help leaders build school-connected systems including early learning and out-of-school time options. Learn more about us at www.fourpointeducation.com.