

CURRICULUM IMPLEMENTATION

— G U I D E —

W O R K B O O K

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About This Workbook

The Curriculum Implementation Guide was designed by Instruction Partners, an education non-profit that works shoulder to shoulder with educators to support great teaching and accelerate student learning. Their work with schools and systems is grounded in the instructional core, providing coaching, action planning, and professional development. In the last three years, Instruction Partners have observed hundreds of classrooms and been fortunate to partner with many schools and school systems. They specialize in supporting smaller school systems, who may lack capacity but are able to make big changes quickly.

This specific workbook was adapted, with permission, to align to the goals and processes of the Alaska Department of Education and Early Development for districts across Alaska.

Background

Our schools are full of children with amazing potential, but getting kids excited about learning — especially when they all have different strengths and needs — is hard work, and too often we ask teachers to do it all on their own. Research shows that providing teachers with high-quality instructional materials to support their teaching is an effective strategy for increasing student learning. When teachers have great instructional materials, they can focus their time, energy, and creativity on meeting the diverse needs of students and helping them all learn and grow.

However, **teachers need much more than a new box of materials.** They need to be supported by a team of leaders who recognize that the process of introducing new instructional materials is a complex one. It demands knowledge of content and instructional pedagogy, attention to detail, and a keen understanding of how curriculum connects to other pieces of a district's plan.

How to

USE THIS WORKBOOK

- ❑ **Make a copy** of this workbook for your district.
- ❑ Although you will work as a team, **designate a scribe** to document ideas and synthesis processes in this fillable Implementation Workbook. During our Adapt and Implement Phases, you will return to the Workbook to revise, rearrange, and archive. You will share the Workbook as part of the formative learning process and grant initiative.
- ❑ There is a Resources section on the [Instruction Partners](#) website that allows you to search for all of the resources described in the guide. These resources will be bolded and hyperlinked in this Workbook. Many of the resources are editable so you can customize for the needs of your team.
- ❑ Some sections are marked OPTIONAL. While we recommend their completion, it might be helpful to plan through the Workbook and then return to these sections.
- ❑ Please note the terms “Phase” and “Stage” are used throughout the materials interchangeably.

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[Instruction Partners](#), 2018

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FRAMEWORK CHEATSHEET

This document outlines all three phases of the process, each key action within the phases, and the steps that make up key actions. This can help you see the whole framework at a more detailed level and check off completed items.

Stage One. Adopt Materials

I.4 Review, Pilot, and Decide

- I.4.C Make the Final Selection Decision
- I.4.D Communicate Decision and Rationale

I.5 Procure and Distribute Materials

- I.5.A Understand Your Procurement Options
- I.5.B Place and Track Your Orders
- I.5.C Communicate a Realistic Timeline
- I.5.D Distribute the materials

Stage Two. Adapt + Prepare

II.1 Set Goals, Roles, and Monitoring Plan

- II.1.A Identify Team
- II.1.B Map out Planning Processes
- II.1.C Draft the Goals for Implementation

II.2 Determine the Plan for Assessment and Grading

- II.2.A Study the Assessments
- II.2.B Inventory All Currently Used Assessments
- II.2.C Determine the Plan for Common Assessment and Data
- II.2.D Establish Grading Guidance

- II.2.E Organize Next Steps and Communicate the Plan

II.3 Determine Expectations for Planning

- II.3.A Study the Design of the Materials
- II.3.B Ensure Every School has Appropriate Time
- II.3.C Determine Yearlong Pacing Schedule
- II.3.D Establish Guidance for Common Use and Customization
- II.3.E Determine How You will Support Planning
- II.3.F Organize Next Steps and Communicate

II.4 Determine the Plan for Coaching (Building level)

- II.4.A Understand Your Current Coaching Practices
- II.4.B Establish Your Observation and Coaching Tool
- II.4.C Determine How You Will Support Those Responsible for Coaching
- II.4.D Organize Next Steps and Communicate the Plan

II.5 Determine the Plan for Training

- II.5.A Understand Available Training Time and Current Plans
- II.5.B Study the Included Training and Materials
- II.5.C Determine Training Needs for Each Group
- II.5.D Determine the Plan and Prepare the Facilitators
- II.5.E Organize Next Steps and Communicate the Plan

Stage Three. Implement

III.1 Work the Plan and Gather Data

- III.1.A Train, Plan, and Coach Teachers
- III.1.B See the Work in Action and Listen to Questions and Concerns
- III.1.C Check in to Track the Trends and Solve Quick Problems

III.2 Step Back and Adjust the Plan

- III.2.A Prepare Data for the Stepback
- III.2.B Step Back to Reflect on Progress and Challenges
- III.2.C Adjust the Plan and Communicate the Changes

III.3 Annually Reset

- III.3.A Prepare Data for the Annual Stepback
- III.3.B Step Back as a Team to Reflect on Progress and Challenges
- III.3.C Adjust the Goals and Plan for Coming Year



Stage ONE

ADOPT and PROCURE MATERIALS

OVERVIEW

The goal of STAGE ONE is to select materials that support a clear and common vision of great instruction with stakeholder participation in the process. Teachers are central to every great selection story and reported learning from the process.

Successful early implementers:

- Were clear on the vision of instruction first so it could inform every step of the process
- Involved educators throughout the process in a meaningful way
- Trained the team on the vision and the standards—not only the review process
- Identified non-negotiables and used them to screen the options
- Communicated the process and decision transparently to the community
- Ordered materials for arrival before summer break, or at least before training

I.4.C: MAKE THE FINAL SELECTION DECISION

GUIDING QUESTIONS

i. Which materials are we going to select?

Consider supplemental materials.

Amplify Core Knowledge Language Arts (CKLA)
mClass Intervention Kit

NOTES

Remember, this is about supporting and strengthening instruction. This decision is a big one, but materials alone do not guarantee great instruction.

ii. Why did we select these materials?

We chose these materials for the following reasons:

- adaptability to multi-age classrooms
- high student interest (The smaller books make it seem more trade books than “readers.”)
- strong background knowledge in science and social studies—a relative weakness for our students
- strong vocabulary development—another relative weakness for our students
- ideas for adapting lessons for both enrichment and interventions
- in-lesson checks for understanding
- digital access (lesson plans, presentations...)
- Can choose which PD you need to use

iii. What are we most excited and optimistic about with these materials?

We chose these materials for the following reasons:

- adaptability to multi-age classrooms
- high student interest (The smaller books make it seem more trade books than “readers.”)
- strong background knowledge in science and social studies—a relative weakness for our students
- strong vocabulary development—another relative weakness for our students
- ideas for adapting lessons for both enrichment and interventions
- in-lesson checks for understanding
- digital access (lesson plans, printables...)
- Can choose which PD you need to use

iv. How do we address our Jagged Culture Profile during implementation with these materials?

- It exposes our students to rich background knowledge in science and social studies. Due to our unique island situation, we have a number of students with high absences. As a result, they may fall behind in both literacy skills and content knowledge in other areas. This program helps to expose them to more than just literature.
- We have a relatively high number of students who transfer from school to school within our district. Due to the spiraling nature of the content throughout the grade levels in this reading program, it will allow students a basic familiarity with the content, even if the schools are focusing on different lessons.



I.4.D: COMMUNICATE THE DECISION AND RATIONALE

GUIDING QUESTIONS

i. How will we communicate the final decision?

We will present our decision to our district's school board at the meeting on May 3, 2023 and present to staff upon board approval.

ii. Is there a sequence we need to plan for how we roll out the decision? Who will communicate what?

1. Presentation to district staff
2. Board approval
3. Superintendent announcement
4. District schedules professional development for staff

iii. What are the key talking points that we want to reinforce in all communications?

- Sound, systematic skills instruction in grades K-2
- Incorporates excellent social studies and science content
- High student interest

iv. What questions will each group of stakeholders have, and what answers can we have ready?

BOARD: cost to district? Will it be used district wide? Grade levels?

ADMIN: How can we share curriculum/materials between sites?
How will we best train and utilize paraprofessionals to maximize student growth?

TEACHERS: Prof development - when will it be available? before school starts in Aug?
Can we have access during the summer?, support for individual teachers throughout year?, district level support? Is CKLA user friendly for multi-age classrooms?

PARENTS: What will my child be learning this year? Will it be different from the last year?
How can I support my child with her reading and writing? Are there materials we can use at home paper/digital?

STUDENTS: How do we get students excited about the new curriculum materials?

NOTES

For each stakeholder group, identify the key information that you want to communicate.

The [Email Sharing Selection Decision and Rationale](#) and [PowerPoint Sharing Selection Decision and Rationale](#) resources are a sample email and PowerPoint you can use as a starting point to communicate your process.

Role playing (which can be awkward but equally useful) can help make sure Team members are on the same page as questions come up.

The [Curriculum Talking Points and FAQ on Selection](#) is a template with talking points and frequently asked questions.

I.5: PROCURE AND DISTRIBUTE MATERIALS

	Key Action I.1: Plan Your Process Key Action I.2: Establish the Vision Key Action I.3: Develop the Rubric and Prepare for Reviews Key Action I.4: Review, Pilot, and Decide	Step I.5.A: Understand Your Procurement Options Step I.5.B Place and Track Your Orders Step I.5.C: Communicate a Realistic Timeline Step I.5.D: Form the Review Committee and Distribute Materials
Phase I: Select	> Key Action I.5: Procure and Distribute Materials	

WHAT IS THE GOAL?

The goal of this key action is to procure all necessary materials and get them into teachers' hands before training.

WHY IS THIS KEY ACTION IMPORTANT?

There is nothing more frustrating than being asked to try something new, but not being given the resources you need for it to be successful. And nothing will undermine confidence in the support a system leader promises than getting materials later than promised. On the flip side, there is nothing more fun than getting the materials, opening them, and leafing through them for the first time. Once the decision on the curriculum has been made, the first question teachers will ask is "When do I get my materials?" Getting this step right — a step that is historically a pain for all involved — is a refreshing change and deeply investing for all involved.

EXPLANATION OF LANGUAGE

We use the word **procure** to describe the process of obtaining materials. We use the word **distribute** to include all actions needed to get materials into teacher and student hands. The term **open source** here refers to materials that are in the public domain and therefore may need to be printed but will not need to be purchased. We use the word **distributor** to refer to anyone — a developer or printer or third party — that produces and shares materials.

I.5.A: UNDERSTAND YOUR PROCUREMENT OPTIONS

GUIDING QUESTIONS

i. Who needs to be engaged in our procurement planning?

Our leadership team, our school staff, our district board

ii. What is our procurement process?

- Assign responsibilities - Determine purchasing lead who creates and sends orders.
- Teacher surveys- Determine the minimum grade level materials required per classroom. (Can you combine?)
- Teachers fill out order forms and shares with coordinator
- Send to DO/Orders placed by DATE??

iii. For our selected curriculum, what are all the possible resources we might need?

Online Intervention Toolkit (Remediation guide?), Tier III intervention – mClass intervention (separate purchase – works with MClass dibels 8) Purchase more mClass screener for grades 4-8. Core materials, Teacher resources, Trade book collections, student activity books

iv. What are the priority resources?

- Classroom kits (1-25 student + teacher for each grade level) & student activity consumables
- Dibels mClass Intervention (\$4,000 for the district) & Dibels mClass Intervention Toolkit (1 per school?)
- Professional development (3 stages: pre, 6-8 weeks into the year, between January and May)
- Trade books for K-2? (1 pack per school?)

v. What are the options for how we could print or procure each resource?

Ordering from vendor (we will have online access and also have the option to print, but this is not time or cost effective.

vi. What is the unit cost for each option?

We will be linking our quote from CKLA. We are expecting it early next week (May 1-3)

vii. What enablers (i.e. technology) will we need?

We currently have the technology we need to access online content for both students and teachers.

viii. What's the total number of materials needed?

Refer to the CKLA quote

NOTES

This step may involve a different set of people than the Selection Team.

[Procurement Responsibilities](#) outlines all tasks in the procurement process and provides a template to organize everyone's responsibilities.

Every system will have a different context for these decisions due to state policy and local requirements. Bidding processes, board approvals, contracting options, and grant funding requirements should be thought through upfront.

The [Materials Procurement Organization Template](#) can help you organize the list of all possible materials.

Remember to account for special education teachers, ELL teachers, homebound teachers and students, and any alternative school or alternative program teachers and students.

Including extras in your initial order saves future coordination due to misreported student numbers, new students coming to the school, or migration between schools.

I.5.B: PLACE AND TRACK YOUR ORDERS

GUIDING QUESTIONS

NOTES

i. What are we going to purchase now?

Refer to the CKLA quote

ii. Which materials do we want to procure as soon as possible? When do we think that will be?

Refer to the CKLA quote

iii. What will be the recurring costs? (Which materials are reusable, and which will be reordered each year?)

Student activity books

Student digital experience if we decide to purchase it (It is free for the first year.)

[Tracking Materials Orders](#) is a tracking template for all materials with a sample calendar to track when to follow up with vendors.

iv. How will we track all purchases through delivery?

Follow normal district purchasing procedures. All materials will be shipped to Thorne Bay, and then sent to each site based on need. All sites will receive a complete teacher's kit for each grade level, k-5. These teacher materials will remain on-site permanently. Student materials not needed for the next school year will be brought back to District office at the end of each year to be redistributed based on enrollment.

v. When will we need to follow up with vendors?

If our products don't arrive by the anticipated delivery date (pending weather).

I.5.C: COMMUNICATE A REALISTIC TIMELINE

GUIDING QUESTIONS

- i. What will each stakeholder group want to know about the materials timeline?

Stakeholders will want to know:

when we will receive materials, dates for training, and initial implementation of the curriculum, and what the scope & sequence looks like.

- ii. What are the key messages we want to share about the materials arrival?

Date the materials arrive

Dates teachers/staff can check-out materials to take back to individual schools.

Plans for professional development

- iii. How do we plan to proactively communicate this information? Who will deliver the communication? When?

District office will send out email to all elementary staff. As soon as we know that we will get materials, we will set up the training and send an email.

- iv. What questions do we expect we will get? How will we answer them?

- How do we use these materials in multigrade classrooms? *We will be working with CKLA to help answer this question.*
- How do we store the materials and keep them organized onsite? *We are looking into purchasing storage boxes to help organize. We will be talking with CKLA reps this weekend to plan for storage options.*

NOTES

For each stakeholder group, identify the key information that you want to communicate.

[Email Communicating Materials Ordering and Distribution](#) is a sample email that you can adapt.

I.5.D: DISTRIBUTE MATERIALS

GUIDING QUESTIONS

- i. **Where will we store the materials before distribution can occur?**

District Office - Thorne Bay

- ii. **How will we inventory materials once they arrive?**

Possible stipend &/or fundraiser

(Staff/ or club sponsor & HS students to inventory)

During our initial training, teachers will come to Thorne Bay to count/select the materials that they need and take them back to their site.

- iii. **How will we inventory and track materials once they are distributed to schools?**

Spreadsheet (district wide)

Office staff to monitor from D/O

Principal & Lead Teacher @ outer schools

- iv. **What information does each teacher need to record? How will they record it?**

All materials they receive & #'s

Record on district wide spread sheet (label by school)

NOTES

The resource [Tracking Materials Orders](#) is a sample inventory plan that you can use as a starting point.



Stage TWO

ADAPT and PREPARE TO LAUNCH

OVERVIEW

The goal of STAGE TWO is to develop an intentional implementation plan — thinking through what it will take to use and support the materials well.

Successful early implementers:

- Understood what great implementation of the materials would look like and the kind of planning it would require in a practical way
- Kept teachers and leaders on the same page and invested equal time in deeply understanding the materials
- Had a plan for what they wanted all teachers to use within the materials (assessments and materials) and how they would support planning and use
- Got ahead of mixed signals that might come from evaluation structures, grading policies, and old lesson planning requirements
- Developed a clear picture of what everyone at the system level and school level needed to do in order to support implementation and communicated those responsibilities clearly
- *Knew their plan would not be perfect* and set time aside during the school year to step back and adjust the support structures

II.1: SET GOALS, ROLES, AND MONITORING PLAN

Phase II: Prepare > Key Action II.1: Set Goals, Roles, and Monitoring Plan

Key Action II.2: Determine the Plan for Assessment and Grading

Key Action II.3: Determine Expectations for Use and the Plan for Collaborative Planning

Key Action II.4: Determine the Plan for Coaching

Key Action II.5: Determine the Plan for Training Teachers and Leaders

Step II.1.A: Identify Implementation Support Team and Leader

Step II.1.B: Map out the Implementation Planning Process

Step II.1.C: Draft the Goals for Successful Implementation

WHAT IS THE GOAL?

The goal of this key action is to set your implementation goals, organize roles and responsibilities, and determine how you will monitor progress and step back to adjust your plans. The work described takes place at two levels — system and school. Implementation Support Teams can be school-based or include multiple schools. While the work of the system and school isn't always exactly the same, the resources and guidance support planning for both teams. Refer to the notes and resources throughout STAGE TWO for considerations on what decisions should be school versus system level.

WHY IS THIS KEY ACTION IMPORTANT?

Naming the team that is responsible for supporting implementation and the goals creates focus and a clear aim for the implementation effort. This key action is important because it sets the conditions for all the planning and implementation support to follow.

EXPLANATION OF LANGUAGE

We use the phrase **Implementation Support Team** to refer to the team that will work together to plan for curriculum implementation. **Implementation** includes all plans for use and instructional support. We use the phrase **progress monitoring plan** to refer to the work you will need to do in order to know how things are going.

II.1.A: IDENTIFY IMPLEMENTATION SUPPORT TEAM AND LEADER

GUIDING QUESTIONS

i. What perspectives do we have on the Implementation Support Team?

We need consistency, but also freedom to use personal “arrows in the quiver”

We need to maintain focus on student opportunity and growth

Continued professional development and collaboration

Utilize local resources/staff/parents

ii. Who will serve on the Implementation Support Team?

Deidre

Sonya

Joel

Christi

Tawnya

iii. Who will lead the Implementation Support Team?

It's important to name a lead for the team for contact purposes. Although you will share roles and responsibilities, select a team member to be the scribe for the group to maintain this document.

Deidre Jensen

NOTES

The Implementation Support Team will engage across all implementation work in STAGES TWO and THREE. This team will ultimately be accountable for the success of the implementation effort.

Some of the decisions in STAGE TWO are system level decisions, but many are school level decisions. This team will vary based on the size of system, but should always include school perspectives and teacher perspectives in addition to central system leaders.

The resource [Implementation Support Team Roles and Responsibilities](#) contains notes on how you might think about this team.

The work of this phase will include assessment implications, grading, pacing, scheduling, coaching, planning support, and training. The person leading this team should have the scope of authority to navigate decisions across these instructional systems.

The document [Implementation Support Team Leader Roles and Responsibilities](#) outlines things to consider in the selection of the team leader.

II.1.B: MAP OUT THE IMPLEMENTATION PLANNING PROCESS

GUIDING QUESTIONS

- i. **What are the decisions we will need to make before teachers start using the materials?**

Decide where materials will be stored.
Professional development (when & where?) for teachers/paras
Which grade level(s) teachers are going to teach in the classroom (need early to order materials)?
How will paras be utilized to implement the curriculum?

- ii. **When can we launch our work as an Implementation Support Team?**

Immediately.

- iii. **How often will we need to meet as an Implementation Support Team?**

Beginning of school - 2 x's per month August-October
Once per month after or on as-needed basis?

- iv. **How will we track decisions and plans?**

Meeting minutes
Log

- v. **What do we need to do to train any new members that were not part of the selection process?**

- Professional development for all staff using curriculum.
- Online training & support.
- District level support person.
- Produce videos of classroom practice to share with all staff

NOTES

The [Phase II Decision-Making Map](#) previews the decisions you will make as you prepare to launch. It's important to identify which decisions will be made at the school level versus system level.

The [Phase II Decision-Making Template](#) provides space for you to outline each decision and the people that need to be involved.

The [Agenda for Phase II Launch Meeting](#) is an adaptable resource you can use and send your team to prepare.

II.1.C: DRAFT THE GOALS FOR SUCCESSFUL IMPLEMENTATION

GUIDING QUESTIONS

i. How will we work as a team?

Assign roles/responsibilities
Scheduled collaboration planning time
Assign mentor or partner teachers to work together

ii. What are the norms we will operate with in our work together?

Look at establishing these norms as a whole group:
Be punctual and respectful of everyone's time
Listen with an open mind: everyone has a right to be heard
If you have a question, ask for clarification
Be prepared to ask/listen to difficult questions

iii. What are our goals for effective implementation?

Teacher/para/student/parent buy-in (Create videos of students who have used the materials and their reactions to present to staff at rollout?)
Administrative follow-up with teachers regarding implementation progress in individual classrooms

iv. How do these goals connect to our system's mission, values, and JCP?

SISD MISSION STATEMENT:

Together we will foster student skills to achieve their goals and thrive in an ever-changing world.

An integral part of our JCP is the diversity of our key players. Having continuity across campuses despite staff and student movement between schools will help maximize student literacy skills.

v. What are the core beliefs that underpin our goals?

The right of every student to be literate.

vi. What will success look like as the process begins??

Staff and student buy-in and feedback.

vii. What will success look like in year one?

All teachers are using the curriculum as the instructional base. They are adding resources to share with colleagues.

NOTES

[Implementation Team Charge](#) is a draft charge that you can put to the Implementation Support Team.

The resource [Goals for Implementation](#) contains a list of sample goals and outcomes for the implementation work, along with considerations from early implementers. Key Action II.2: Determine the plan for assessment and grading will inform and support your goals around student outcomes.

This is the time to think through the next few years and look at your goals in a bigger context — don't be afraid to think beyond year one.

Return to your [Implementation Plan](#) to support goal setting. Your team will come back to finalize these goals at the end of Phase II.



II.1.D: SET IMPLEMENTATION GOALS AND DETERMINE HOW YOU WILL MONITOR PROGRESS

GUIDING QUESTIONS

i. What are our goals for implementation?

Our goal is to have 100% of staff teaching from the curriculum and collaborating with other staff members to maximize student learning.

ii. How will we know if we reach our goals?

Regularly scheduled collaborations occur. Feedback from the teachers via a google form or during inservice training.

iii. For each goal, when will we know if we are on track?

We will record collaboration meetings and post input on a district shared folder. Regular check ins with teachers and students.

iv. What data will we review?

Teacher participation. Google form/survey to monitor implementation progress/process.

v. Operationally, what needs to happen to get this data?

Who is responsible?

Create survey, file all collaboration meeting notes, monitor shared resource folder growth.

Curriculum committee (Implementation support team/leadership team) and Curriculum Director.

vi. In addition to monitoring progress, how will we collect stakeholder feedback?

Staff meetings

Surveys

Collaboration discussions

vii. When will we step back to review our progress toward our goals holistically? Who will be part of these stepbacks?

Check in on all inservice days.

viii. Who should each group of stakeholders go to with questions?

The Biden Administration jk, curriculum committee and each other.

NOTES

Be as concrete and specific as you are able to here, considering your highest priorities, including stakeholder and teacher buy-in and logistical concerns.

The resource [Progress Monitoring Plan and Approaches](#) includes common progress monitoring approaches for the frequently used goals.

For school level roles and responsibilities, you can see sample distributions and guidance in the [Roles and Responsibilities Matrix](#).

The [Stakeholder Feedback Survey](#) includes sample questions that can be asked for periodic feedback.

Early implementers benefited from regular opportunities to bring the team together to look at how things were going and adjust course. [Progress Monitoring Practices](#) shares some best practices around progress monitoring and frequency suggestions. Page 11 from LIFT Education's [Instructional Materials Implementation Guidebook](#) provides suggestions for how to use student work samples as an effective means of monitoring progress along the way. The resource [Challenge Solving Protocols](#) outlines some effective protocols to share emerging challenges.

II.1.E: ROLES AND RESPONSIBILITIES AND SET THE PLAN

GUIDING QUESTIONS

- i. **Brainstorm the roles and responsibilities of each team member.**

Our team is so small that we will need be adaptable and work together. We all play a part in so many roles. Curriculum director will establish these roles for the future.

- ii. **Name any places of potential overlap or confusion.**

Administration's responsibility to check-in with individual teachers.

- iii. **Name any concerns about an imbalance workload.**

We are all laughing really hard right now.

- iv. **For each workstream, what are the key activities and deadlines?**

Establishing PD, especially the initial 6-hour sessions, coaching, strengthening, adjust inservice days so teachers can visit other sites.
Meeting Norms with checklist
Aligning PD with regularly scheduled meetings if possible

- v. **How will we check in to ensure that all of the work gets done?**

By tracking meeting notes, participation, and surveys. Group members will support each other and hold each other accountable.

- vi. **Are our systems for planning, coaching, and training aligned and coherent?**

With multiple sites and distance between them, we really need to align on our inservice days.

- vii. **What are we going to do as an Implementation Support Team to celebrate finishing this important planning work?**

Close our computers!

NOTES

Step back from this list and make sure the distribution of work makes sense.

Setting up decision-making protocols in advance will make things easier down the road.

Review the plans you developed for supporting planning, coaching, and training in Key Actions II.3–II.5. These represent your [Three Pillars of Teacher Support](#). Make sure that these systems work together to support teachers and ensure that teachers are getting consistent messages and feedback about how to utilize materials.

You have finished Phase III! You should now have a clear plan for implementation support. Next, it is time to launch the work.

Find a list of ways that you can celebrate in the resource [Celebration Ideas!](#)



II.2: DETERMINE THE PLAN FOR ASSESSMENT AND GRADING

Phase II: Prepare >	Key Action II.1: Set Goals, Roles, and Monitoring Plan	Step II.2.A: Study the assessments in the curriculum
	Key Action II.2: Determine the Plan for Assessment and Grading	Step II.2.B: Inventory all currently used assessments for purpose, frequency, and quality
	Key Action II.3: Determine Expectations for Use and the Plan for Collaborative Planning	Step II.2.C: Determine the plan for common assessment and what you will do with the data
	Key Action II.4: Determine the Plan for Coaching	Step II.2.D: Establish grading guidance for the new materials
	Key Action II.5: Determine the Plan for Training Teachers and Leaders	Step II.2.E: Organize next steps and communicate the plan

WHAT IS THE GOAL?

The goal of this key action is to clarify the expectations for assessment and grading in the new curriculum. This step comes before pacing because your common assessments will anchor your planning.

WHY IS THIS KEY ACTION IMPORTANT?

The majority of systems have a pre-existing assessment strategy prior to selecting materials. It's important to consider your system's overall assessment strategy (the purpose, frequency, and quality of each assessment) in thinking through the role of curriculum-embedded assessments. Several early implementers spent considerable money and time designing item banks or additional assessments without realizing how many assessments were already in their curriculum. This often led to teachers administering multiple assessments for the same purpose, which was confusing for both students and teachers. Similarly, students and parents often experience the materials for the first time in the form of grades, and being proactive about what will be graded and how can make this transition easier. Taking the time to understand the assessments in your materials, how they fit into your larger assessment strategy, and what will get graded can reduce mixed signals, confusion, and anxiety for all involved.

EXPLANATION OF LANGUAGE

We use the expression **assessment** purposes to describe why the assessment is being given in the first place. We use the expression **common assessments** to describe assessments that are expected to be taken at the same time and in the same way across an entire school or district.

II.2.A: STUDY THE ASSESSMENTS IN THE CURRICULUM

GUIDING QUESTIONS

NOTES

i. What type and level of assessments are provided?

ii. What do they assess?

iii. How are they designed?

iv. What kind of information will this assessment give teachers?

v. How is this similar or different than our state test?

\

The resource [Agenda for Assessment Study](#) has an agenda that you can adapt to facilitate this meeting.

It can be tempting to become a literalist in assessment format and lose the big picture of the kind of content work that the state test requires. That is the work students need practice with daily, in a variety of formats. Don't get too caught up in format differences.

II.2.A: STUDY THE ASSESSMENTS IN THE CURRICULUM (CONT.)

GUIDING QUESTIONS

vi. Are there end of module/unit assessments (Summative)?

vii. What do they assess?

viii. How are they designed?

ix. What information will the end of module/unit assessments give teachers?

x. Within a module/unit, what assessments are included (Formative)?

xi. What do they assess?

xii. How are they designed?

xiii. What information will the assessments within modules/units give teachers?

NOTES

The end of module/unit assessments are the assessments that most early implementers chose to have all teachers complete in common.

Have the team take the assessments individually to understand the mental work required.

If the difficulty of the assessment causes feelings of fear and concern, follow the [Guide for Discussing Assessment](#) for managing emotions.

Assessments within modules/units vary considerably across different materials.

Have the Implementation Support Team take the assessments to understand the mental work required.

II.2.B: INVENTORY ALL CURRENTLY USED ASSESSMENTS FOR PURPOSE, FREQUENCY, AND QUALITY

GUIDING QUESTIONS

i. What are our key purposes for assessments?

ii. What are all the assessments that students in our district currently take and how often do they take them?

iii. What purpose(s) does each assessment serve?

iv. What is the quality of each assessment? Are they authentic and culturally responsive?

v. What do we do with the data from each assessment?

NOTES

The resource [Assessment Purposes](#) provides a starting point, if needed.

This step helps your team mitigate assessment fatigue and note which assessments are FOR learning and which are OF learning. Some state level assessments may duplicate the assessments in your curriculum, which means you can omit particular assessments that gather the same data.

The resource [Assessment Review Tools](#) provides guidance and tools for determining the quality of assessments. At the highest level, early implementers in ELA found it helpful to focus on quality texts and quality items.

II.2.B: INVENTORY ALL CURRENTLY USED ASSESSMENTS FOR PURPOSE, FREQUENCY, AND QUALITY (CONT.)

GUIDING QUESTIONS

vii. What adjustments do we need to make based on our unique setting and Jagged Culture Profile?

viii. Are there any assessments that have redundant purposes that we can discontinue?

ix. Are there any assessments that have overlapping purposes? What is the best course of action?

x. Which assessments are we going to administer across the district in each grade?

NOTES

Simplifying the number of assessments allows for more time on instruction and more time to process and use the data you get from the assessments students are taking.

Curriculum-embedded assessments serve a different purpose than interims or summatives. They give shorter-cycle feedback (i.e. at the end of a unit) on student understanding of the standards and content, often highlighting student misconceptions.

Some teachers desire to blend the curriculum-embedded assessments with sample state test items to give some format experience. In assessment design, the design of the item is quite complex, and altering items to make them look like state assessments (such as making them multiple choice) will affect the validity and reliability of the item. It is better to keep items intact and draw from different sources (i.e. pull some state test items into the curriculum assessment) than to adjust the design of the items themselves.

II.2.C: DETERMINE THE PLAN FOR COMMON ASSESSMENT AND WHAT YOU WILL DO WITH THE DATA

GUIDING QUESTIONS

- i. What assessments are we going to administer across the district?

- ii. What role do classroom teachers play in these decisions?

- iii. How do we allow for consistency and agency at the classroom level?

- iv. What will we do with the results from each assessment?

- v. What feedback will students get from each assessment?

NOTES

The [Assessment Purpose Template](#) can help you organize your answers, and includes a few sample responses.

These questions often need to be considered at both the system and school levels.

Make sure to bring teacher voice into this discussion. The natural inclination is to make testing decisions based on what the system needs (predictive and evaluative data for summatives), but not necessarily for what the teacher needs (instructional data). Many districts had success with getting teacher input on shared interim assessments and having teacher leaders define formative assessment practices.

II.2.C: DETERMINE THE PLAN FOR COMMON ASSESSMENT AND WHAT YOU WILL DO WITH THE DATA (CONT.)

GUIDING QUESTIONS

vii. For each assessment, will we collect the data centrally? If so, how?

NOTES

There are a number of platform providers that are able to import your assessments directly and help with administration and roll-up.

viii. How will results get reported?

Be careful in standard-based reporting for ELA — this may not be reflective of how the state test is designed or how students learn to read.

ix. For each assessment, what do we expect teachers to do with the data?

You will lay out your plan in more detailed in Phase II, Key Action 3, Step E: Determine how you will support collaborative and individual planning.

x. How will we know if that is happening? What if it is not?

II.2.D: ESTABLISH GRADING GUIDANCE FOR THE NEW MATERIALS

GUIDING QUESTIONS

- i. What is our district/school grading policy, that will impact grading?

- ii. Who will decide which assignments will be graded?

- iii. What questions do we anticipate about assessments?

- iv. What other questions will come up about grading? How will we handle them?

NOTES

[Resources on Grading](#) shares a compilation of good resources around grading policy.

Grading decisions should be made in the larger context of a defined assessment strategy. In considering what to grade, review your formative assessment list.

While curriculum developers tend to produce a fair amount of guidance on use and pacing, they rarely provide guidance or support on how to handle grading.

Occasionally, there will be rubrics and sample student work, but there is a lot of judgment that teachers and leaders need to make to match the curriculum to your grading policy.

[Common Grading Challenges](#) includes frequent issues that come up in grading and options for how to approach them.

II.2.E: ORGANIZE NEXT STEPS AND COMMUNICATE THE PLAN

GUIDING QUESTIONS

NOTES

- i. How do we communicate the next steps that we need to take based on the decisions we made together?

- ii. What can we add to our roles and responsibilities tracker?

- iii. What training will all teachers using this curriculum need prior to launching the materials in order to be ready for their assessment and grading responsibilities?

- iv. What training will all leaders supporting this curriculum need prior to launching the materials to be ready for their assessment and grading responsibilities?

- v. What will each identified stakeholder group want to know about assessment and grading?

- vi. How do we plan to proactively communicate this information? Who will deliver the communication? When?

- vii. What questions do we expect we will get? How will we answer them?

Throughout Phase II, you will track the training needs at the end of every step, and in Key Action II.5: Determine the plan for training teachers and leaders, you will prioritize and sequence these needs.

Use the resources [Email Communicating Assessment Choices](#) and [PowerPoint Communicating Assessment Choices](#) as a starting point to communicate your process.

II.3: DETERMINE EXPECTATIONS

Phase II: Prepare >	Key Action II.1: Set Goals, Roles, and Monitoring Plan	Step II.3.A: Study the Design of the Materials
	Key Action II.2: Determine the Plan for Assessment and Grading	Step II.3.B: Ensure every School has Appropriate Time in the Schedule
	Key Action II.3: Determine Expectations for Use and the Plan for Collaborative Planning	Step II.3.C: Determine the Yearlong Pacing Schedule
	Key Action II.4: Determine the Plan for Coaching	Step II.3.D: Establish Guidance for Common Use and Customization
	Key Action II.5: Determine the Plan for Training Teachers and Leaders	Step II.3.E: Determine How You will Support Collaborative and Individual Planning
		Step II.3.F: Organize Next Steps and Communicate the Plan

WHAT IS THE GOAL?

The goal of this key action is to set up the plans for pacing, use, and planning. This key action includes ensuring the right time is in the daily schedule and setting the expectations for materials use and customizations.

WHY IS THIS KEY ACTION IMPORTANT?

Instructional judgment (deciding what to teach and what to adapt) is fundamental to good curriculum implementation. A strong starting point creates relief for teachers from the constant hunt for resources. However, it does not eliminate the work of preparing for instruction. Setting up clear plans for use and lesson preparation creates clarity about what needs to be taught and the specific role the materials need to play in instruction. Quality collaboration opportunities invigorate practice and strengthen implementation; however, these structures require clarity, support, and a clear plan of action. This key action begins with a curriculum study to help all decision makers deeply understand the intent and design of the materials. This understanding supports strong decision-making about material adaptations. Key Actions 3-5 focus on systems for teacher and leader support, or the system's overall plan for supporting professional learning. These systems must work together so that teachers do not receive mixed messages about how to use the materials. These systems also depend on a strong instructional culture within the school and system.

EXPLANATION OF LANGUAGE

We do **NOT use the word “fidelity”** because we have found that it is often used as a blanket term to the whole curriculum — as opposed to identifying which aspects of the curriculum (i.e. assessments, units, lessons) that should be taught in a **common** way, across the school or system. The **schedule** refers to the daily plan for time. **Pacing** refers to the instructional calendar across the school year. We use the term **collaborative planning** to refer to the planning work that teachers may do with other teachers using the same materials. We do **NOT use the term “professional learning collaborative” or “PLC”** throughout this step, although many schools will probably equate collaborative planning with PLCs. We focus instead on “collaborative planning.”

II.3.A: STUDY THE DESIGN OF THE MATERIALS

GUIDING QUESTIONS

- i. **Select ONE grade to preview closely. Which grade(s) are we studying? Which unit(s)?**

We have looked at 5th grade “Native Americans” and 4th grade “The Changing Earth.”

- ii. **How many modules/units are there? How long are the units?**

Refer to CKLA outlines

- iii. **How are units organized? What is the structure within the unit?**

[SISD CKLA Resources](#)

- iv. **How are lessons organized? Is there a structure within the lesson?**

[SISD CKLA Resources](#)

- v. **Are there any supplemental materials that apply to this unit? What do those materials include?**

We will need the materials for the culminating activity taught at the end of each module. CKLA does not supply this list of materials. However, groups of teachers have made this list for each grade level on CKLA facebook pages.

- vi. **Based on the Jagged Culture Profile, which materials may not be present in the curriculum that we still need?**

We will need the materials for the culminating activity taught at the end of each module. CKLA does not supply this list of materials. However, groups of teachers have made this list for each grade level on CKLA facebook pages.

NOTES

The Implementation Support Team will make better decisions with a common understanding of the design of the materials.

There is a lot you can learn from working through one grade of materials together. This takes time and close reading, but doing it upfront saves time on the back end.

Pick one grade, or a couple of grades if the structure of the materials is fundamentally different in different grade bands (i.e. K–2 is different than 3–5).

The resource [Curriculum Study](#) provides guidance, a sample agenda, and prep email. You can pick one member of the team to do a more comprehensive study and pull the key resources that the full team should review. Ask your materials developer or district colleagues that have used the materials before for a quick orientation and links to the most helpful materials.



II.3.B: ENSURE EVERY SCHOOL HAS APPROPRIATE TIME IN THE SCHEDULE

GUIDING QUESTIONS

- i. What guidance does the curriculum developer offer about scheduling and time needed per lesson?

[CKLA Review](#): Program Guide

- ii. Does this match our current structure (for every school using these materials)?

It does not match our current structure. We have a 4 day school week with longer days, but multiple grades (more than 1 in a classroom).

- i. Are there intervention programs being used that currently take up instructional minutes? How does that impact pacing?

We have no intervention program. We need to establish this and it is on the list of to-do items. We are also hoping to use the mclass intervention.

- iv. If not, how will we adjust?

See Above

NOTES

It is very hard to implement a curriculum well if you do not have the same amount of time allocated in the schedule as intended in the designed lesson. Almost every early implementer we interviewed talked about matching the length of the curriculum as a key enabler of success.

If the school or district schedule has an immovable, shorter time for the block than the design, materials will likely need to be cut down or edited. If the school or district schedule has an immovable, longer time for the block than the design calls for, lessons will need to be doubled up. Making these types of adjustments requires a strong understanding of the intent of each lesson and unit, as well as the standards. Therefore, you'll need to factor that time and support into your decision. Use the resource [Scheduling Considerations](#) to guide your thought process.

This step will require both system and school level planning and decision-making.

II.3.C: DETERMINE THE YEARLONG PACING SCHEDULE

GUIDING QUESTIONS

- i. What guidance does the curriculum developer offer about pacing?

[SISD CKLA Resources](#)

- ii. How many units? How many days/units across the year?

[SISD CKLA Resources](#)

It is complicated per grade per knowledge section and per skills section.

- iii. What school or district-wide events do we already know of that we need to plan around?

2023-24 School calendar has not yet been determined.

- iv. How many units do we want all teachers to complete in common? Which units?

The negotiated agreement allows for academic freedom. Clarification on this needs to be established: CKLA curriculum is our foundation, other resources are able to be used to address other student needs. This needs to be a superintendent directive and clarification.

- v. What points in the curriculum do we want all teachers reaching at the same time?

This is not realistic due to the multigrade nature of our district's schools.

- vi. What type of flexibility do we need in the schedule?

Each site determines their own schedules.

- vii. Are there additional topics that we need to add?

No

- viii. What is our year long pacing schedule for this grade?

[SISD CKLA Resources](#)

- ix. What needs to happen to get to a final pacing schedule for the other grades?

Not applicable. CKLA pacing guides will be foundational pacing guide.

NOTES

Revisit the [Curriculum Study](#) and the work your team did together during Step II.3.A: Study the design of the materials. **Pick one grade to study as an Implementation Support Team.** You might want to complete this with the Districts who share your curriculum.

While the pacing plan can start at the system level, typically each school may need to make it their own, given any school-specific considerations.

The resource [Pacing Guidance](#) can help you arrive at a pacing schedule.

This is a great place for teacher leadership. The [Agenda and Email for Determining Pacing](#) is a sample agenda and preparation email that you can send to grade leaders to draft pacing guidance.

II.3.D: ESTABLISH GUIDANCE FOR COMMON USE AND CUSTOMIZATION

GUIDING QUESTIONS

i. What guidance does the curriculum developer offer about planning routines and customizations?

K-2 routines document for skills and knowledge strands. 3-5 routines document for skills strand. These three documents will need specific PD training. For example: 1 activity in K-2 done daily is blending and segmenting. This document gives guidance to support implementation of programming. Scaffold, differentiate or customization is done by using grouping strategies.

ii. What decisions are teachers going to need to make within a given unit?

Give teachers permission to use pausing point days and to not worry about the kids not getting the material that is supposed to be taught. We need to build in pausing point days to reteach or extend learning. Intentionally target the pausing point days with student struggles from in class data. There is not any point in getting to the end of the book, if you are not going to take your kids with you.

iii. What decisions are teachers going to need to make within a given lesson?

Grouping strategies will need to be decided if it is whole group, small group, and/or independent. We wait for our training with CKLA to assist in the decision making process of this for our multi-grade (as many as k-6 grade) classrooms.

iv. Which aspects of the unit do we want all students to experience in a common way?

We want all students to be taught each foundational skill in each lesson to ensure no gaps.

v. Which aspects of the lessons do we want all teachers to teach in common?

Ensure foundational skills are taught in K-2. Grades 3-5 foundational skills as needed. Teachers use the texts as the foundation for student instruction.

vi. What kinds of customizations will we support? What kinds of customization would we not want to see?

We will be needing support from CKLA about how to address these customizations.

NOTES

There are heartfelt emotions that come up when teachers see the more scripted pieces of many materials. Some may love the clarity, but many experience a sense of restrictiveness when they see the instructional design done for them in complete form. In every curriculum, there are decisions that teachers will need to make within the lesson and unit to ensure instruction meets the needs of students. Effective instruction requires professional judgment — look for the places that judgment lives in the materials.

[Guidance on Curriculum Use](#) provides context on how to think about key decisions within a curriculum.

The resource [Example Curriculum Use Guidance](#) gives an overview of potential customizations and a sample approach which early implementers found helpful.



II.3.E: DETERMINE HOW YOU WILL SUPPORT COLLABORATIVE AND INDIVIDUAL PLANNING

GUIDING QUESTIONS

- i. **What are your current lesson planning structures or expectations?**

There are none at this time other than it is best practice.

- ii. **What structures do you currently have in place for collaborative planning?**

We are hoping for weekly collaboration time with teachers and paras. We have yet to determine how that will happen. Collaboration during inservice times is being used more frequently, as well as including para's during in-service training.

What is done during any collaborative planning time?

- iii. **What is most valued and effective in this time?**

Sharing success stories, how challenges are overcome, structures/routines that work well with multigrade groups.

- iv. **What planning do we want teachers to do together?**

Sharing success stories, how challenges are overcome, structures/routines that work well with multigrade groups.

- v. **What student work review and reflection do we want teachers to do together?**

Sharing success stories, how challenges are overcome, structures/routines that work well with multigrade groups. Observations of each other's class and discussing. Collaboration time with para's.

- vi. **When can they do this collaboration?**

To be determined.

- vii. **What is the best structure for this time?**

We are unsure at this time. Still developing the schedule for next year.

- viii. **Who is best positioned to support the effective use of this time?**

The new curriculum director.

NOTES

Determining supports for collaborative and individual planning is part of your larger professional learning system. It can be helpful to start by assessing the current state using the [Practice What You Teach Checklist for Schools and Systems](#). Over the next two key actions, you'll continue to build your teacher support systems by thinking about coaching and training.

Gathering any lesson planning template requirements or conducting a focus group with teachers about the current use of collaborative planning time can be a good starting point. The resource [Teacher Focus Group on Planning Support](#) has some focus group questions you can use to ask teachers directly.

The answers to these questions may vary considerably.

Look back at your assessment and grading notes in Key Action II.2: Determine the plan for assessment and grading to connect student work reflection with your assessment and grading plans.

The [Student Work Protocols](#) resource overviews protocols for analysis of student work. This can be done either at the system or school level (frequently at the school level). However, it requires a group of teachers who are teaching the same grade and materials. If that group does not exist within a single school, then explore options across schools.

[Collaborative Planning Protocols](#) includes protocols that you can explore for time use and an adaptable template for your agenda.

[Collaborative Planning Models](#) includes models for teacher leader facilitation of collaborative planning and reflection structures.

II.3.E: DETERMINE HOW YOU WILL SUPPORT COLLABORATIVE AND INDIVIDUAL PLANNING (CONT.)

GUIDING QUESTIONS

- ix. What individual preparation and analysis will teachers need to do outside of collaborative planning time?

Just keeping their heads above water would be miraculous! We are demanding so much of our teachers at this point—they just need to follow best practices.

- x. How do we best support individual preparation? What does this mean we need to change about any lesson planning routines or requirements?

PD and collaboration time. Follow up PD after our initial training.

- xi. Who is responsible for supporting collaborative planning and reflection?

The curriculum director (implementation team leader)

- xii. What will the people supporting collaborative planning and reflection need to know and be able to do?

They will need to know they have time. Do they have the skills to carry this out.

- xiii. How will we train and support them to do this work well?

We are unsure at this time.

NOTES

The resource [Lesson Planning Structures](#) gives an overview of individual planning structures that early implementers used to ensure effective preparation. Some systems opted to have teachers use the planning structures in their collaborative planning meetings.

The resource [Support Roles for Teacher Planning](#) outlines the potential roles for supporting collaborative planning and the support needs for the individuals doing this work.

This is a ripe place for teacher leadership, and building the instructional leadership of teachers can also support your future leadership pipeline.

Protocols alone do not create a vision of how to facilitate effective collaboration. Facilitators benefit from seeing a model and **collaborating with other facilitators**.

Early implementers consistently indicated that it was beneficial to keep the collaboration structures **grounded in the materials and student work**. Straying too far from these touchstones often created challenges.

II.3.F: ORGANIZE NEXT STEPS AND COMMUNICATE THE PLAN

GUIDING QUESTIONS

- i. What next steps do we need to take based on the decisions we made together?

Schedule PD and find a way to make collaborations occur.

- ii. What can we add to our roles and responsibilities based on the work we outlined in this key action?

We need superintendent's input. (He will begin work July 1.)

- iii. What information or training will all teachers need in order to be ready to engage in collaborative planning and reflection?

We will need training on what fidelity looks like and CKLA Amplify with coaching support from the CKLA team. What are the durables we have with the program and how do we use them.

- iv. What information or training will all leaders need prior to launching the materials to be ready for collaborative planning and reflection support structures?

We will need training on multi-grade classrooms. We would like to be included in the PLC groups the state is developing.

- v. How do we plan to proactively communicate this information? Who will deliver the communication? When?

At our initial training with CKLA.

- vi. What questions do we expect we will get? How will we answer them?

How do we manage all of the instructor materials?
How do we utilize the materials, especially with multigrade classes?
What is the paras' role?

NOTES

Go back to your [Implementation Plan](#) to track your next steps and add to your roles and responsibilities tracker.

Throughout Phase II, you will track the training needs at the end of every step, and in Key Action II.5: Determine the plan for training teachers and leaders, you will prioritize and sequence these needs.

Use the resources [Email for Communicating Pacing, Use, and Planning](#) and [PowerPoint for Communicating Pacing, Use, and Planning](#) as a starting point to communicate your process.

II.4: DETERMINE THE PLAN FOR COACHING (Building Level)

Phase II: Adapt >	Key Action II.1: Set Goals, Roles, and Monitoring Plan	Step II.4.A: Understand Your Current Coaching Practices
	Key Action II.2: Determine the Plan for Assessment and Grading	Step II.4.B: Establish Your Observation and Coaching Tool
	Key Action II.3: Determine Expectations for Use and the Plan for Collaborative Planning	Step II.4.C: Determine How You will Support Those Responsible for Coaching
	Key Action II.4: Determine the Plan for Coaching	Step II.4.D: Organize Next Steps and Communicate the Plan
	Key Action II.5: Determine the Plan for Training Teachers and Leaders	

WHAT IS THE GOAL?

The triangle of teacher support includes three pillars: training, collaborative planning, and coaching. The goal of this key action is to organize the plan for coaching, including all observation and feedback structures.

WHY IS THIS KEY ACTION IMPORTANT?

Feedback and coaching can have a significant and positive impact on teaching and learning. Teachers want helpful feedback and support — but they want that feedback to truly come from a place of help and to give them concrete ideas that will make a difference for their students. There is no faster way to undermine teacher confidence in new materials than to give them feedback that conflicts with the design of the materials. There is also no faster way to lose teacher trust than to judge their choices without understanding their perspective.

NOTE: “Coaching” is not Vendor Training; it’s the ongoing process that happens as part of ongoing professional development, goal setting, or new teacher induction.

EXPLANATION OF LANGUAGE

We use the word **coach** throughout to refer to anyone who provides teachers with feedback and support. This could be someone with the job title of teacher leader, coach, assistant principal, or principal. All of these individuals — and anyone who supports their work — need to be on the same page about what they are looking for in classrooms. We use the term **walkthrough tool** to describe what you look for on a daily basis when you observe instruction. We include questions about **evaluation structures** (how a teacher’s performance is evaluated) in this key action because the core intent of evaluation is improvement. We know that these are loaded terms and structures and that they vary from state to state and district to district.

II.4.A: UNDERSTAND YOUR CURRENT COACHING PRACTICES

GUIDING QUESTIONS

- i. What structures do we currently have in place for coaching?

- ii. Who receives coaching? How often?

- iii. Who does the coaching?

- iv. What is the focus of coaches in your setting?

- v. How do teachers get feedback from coaches? What is the focus of the feedback and the system for using it?

- vi. How are coaches currently trained and coached?

NOTES

Coaches can include individuals with that title, assistant principals, principals, or teacher leaders.

The answers to these questions may vary from school to school.

You can use this exercise as an opportunity to understand what your teachers believe the expectations to be and survey them on what they experience their coaches and evaluators to be looking for based on the feedback they receive. The resource [Teacher Survey on Coaching Experience](#) is a survey that you can send to teachers.

Those who are in coaching roles have a wide range of responsibilities, and there is no given path for training and certification for these roles. The answers to these questions may vary from coach to coach.

II.4.A: UNDERSTAND YOUR CURRENT COACHING PRACTICES (CONT.)

GUIDING QUESTIONS

vii. What do we currently observe as part of teacher evaluation?

viii. What do evaluators look for when they go into classrooms?
You might name official and unofficial metrics

ix. How do evaluators provide feedback?

x. How are evaluators trained and supported?

NOTES

Your evaluation instruments will anchor a significant amount of the feedback given to teachers across the year, and it is worth the time to make sure they support the vision of instruction in your new materials. Knowing and naming the potential areas of tension are the first steps.

II.4.B: ESTABLISH YOUR OBSERVATION AND COACHING TOOL

GUIDING QUESTIONS

- i. What about the design of this curriculum matches our coaching and/or evaluation framework?

- ii. What about the design of this curriculum does not match our coaching and/or evaluation framework?

- iii. Does the curriculum developer make any recommendations for what to look for in observations? If so, how do they align with your current observation tools?

NOTES

Most coaching and evaluation frameworks are broad enough to match well with all curricula, but sometimes features of a curriculum (the way grouping is suggested or the way students discover the meaning rather than the teacher presenting it) can lean towards or away from certain indicators.

Sharing what you have done to ensure the coaching framework aligns with the curriculum will invest teachers; however, not thinking through these tensions and sending mixed signals will disinvest teachers.

The resource [Curriculum Walkthrough Tools](#) links to curriculum-specific notes on observation tools.

II.4.B: ESTABLISH YOUR OBSERVATION AND COACHING TOOL (CONT.)

GUIDING QUESTIONS

- iv. Given our vision and the design of the materials, what do we want coaches to look for in observations?

- v. What do we want coaches to do with the feedback?

- vi. Who will get coaching? How often?

- vii. Who will provide the coaching?

- viii. Given our vision and the design of these materials, what do we want to look for in our evaluations (or what evidence do we want to focus on)?

NOTES

See an example coaching model in the resource [Coaching Model Overview](#)

Evaluation instruments can be hard to change, and it may not be necessary to do so. Adjusting the evidence look-fors or clarifying what evaluators should consider when reviewing indicators can allow for coherence. [Aligning Evaluation and Curriculum](#) gives an overview of how to ensure that evaluation and curriculum support each other.

II.4.C: DETERMINE HOW YOU WILL SUPPORT THOSE RESPONSIBLE FOR COACHING

GUIDING QUESTIONS

- i. What do coaches need to know about the design of the materials before conducting an observation?

- ii. What do coaches need to do after each observation to prepare for the coaching conversation?

- ii. What support and feedback will coaches need to do this work well?

- iv. Who will provide that support to coaches?

NOTES

It is pretty impossible to conduct a good observation of a teacher using strong materials without studying those materials prior to the lesson. This is often a change in habit for coaches and evaluators. Help launch this practice early. The resource [Coach Curriculum Training](#) outlines topics for coach training and support.

Coaches will need to think about how to give curriculum-specific feedback to teachers. The best way to make sure that teachers are getting great feedback is to make sure that your coaches are getting feedback. Don't over-complicate this — and look for ways to bring people together to learn from each other, including across districts sharing the same curriculum.

Leverage the capacity you have (or the capacity right near you). The resource [Coaching Support](#) outlines best practices for coaches giving feedback and support to teachers and for leaders giving feedback and support to coaches.

II.4.D: ORGANIZE NEXT STEPS AND COMMUNICATE THE PLAN

GUIDING QUESTIONS

NOTES

- i. What are the next steps that we need to take to set up our coaching work based on the decisions we made together?

- ii. What can we add to our roles and responsibilities based on the work we outlined for coaching?

- iii. What training or key information will all teachers using this curriculum need prior to launching the materials in order to be ready to engage in coaching?

- iv. What training or key information will all coaches and leaders supporting this curriculum need prior to launching the materials to be ready to support coaching?

- v. How do we plan to proactively communicate this information? Who will deliver the communication? When?

- vi. What questions do we expect we will get? How will we answer them?

Throughout Phase II, you will track the training needs at the end of every step, and in Key Action II.5: Determine the plan for training teachers and leaders, you will prioritize and sequence these needs.

When thinking about communication, many people found it helpful to think about each piece (training, planning, and coaching) together so that stakeholders are getting all the information they need in one communication. See **Step II.5.E: Organize next steps and communicate the plan** and the resources [Email Communicating Support Plan: Training, Planning, and Coaching](#) and [PowerPoint Communicating Support Plan: Training, Planning, and Coaching](#) as a starting point to communicate your process.

II.5: DETERMINE THE PLAN FOR TRAINING (Vendor Based)

Phase II: Prepare >	Key Action II.1: Set Goals, Roles, and Monitoring Plan	Step II.5.A: Understand Available Training Time and Current Plans
	Key Action II.2: Determine the Plan for Assessment and Grading	Step II.5.B: Study the Training and PD Resources that Come with Your Materials
	Key Action II.3: Determine Expectations for Use and the Plan for Collaborative Planning	Step II.5.C: Determine Training Needs for Each Group
	Key Action II.4: Determine the Plan for Coaching	Step II.5.D: Determine the Plan and Prepare the Facilitators
	Key Action II.5: Determine the Plan for Training Teachers and Leaders	Step II.5.E: Organize Next Steps and Communicate the Plan

WHAT IS THE GOAL?

The goal of this key action is to provide teachers and leaders with upfront and ongoing training experiences that deepen their knowledge of how the curriculum works and set the foundation for strong instruction. This key action completes your planning for professional learning that you started in Key Actions II.3 and II.4. Your systems for supporting planning, coaching, and training should align and form coherent supports for teachers.

WHY IS THIS KEY ACTION IMPORTANT?

Training teachers and leaders on the curriculum is necessary, but not sufficient. Training is not a discrete step, and checking this box will not lead to home-run implementation.

However, skipping this step is guaranteed to result in problems. You tackle this last so that you can incorporate all of the training needs you identified across the other key actions as you prepare to launch. **Remember, you are not just training teachers on how to use materials. You are training them on the vision of great instruction and expectations for students and how these materials can serve that vision.**

EXPLANATION OF LANGUAGE

We use the word **training** even though we know that there are strong opinions about words like training versus **professional development** versus **professional learning**. We use the word training because this key action really is about the specific training (delivery of knowledge and skill) as opposed to the broad umbrella of professional learning, which would include coaching and collaborative planning.

II.5.A: UNDERSTAND AVAILABLE TRAINING TIME AND CURRENT PLANS

GUIDING QUESTIONS

- i. What time do we currently have in place for training across the year? Who attends?

We are setting up training after schools ends this year, but have yet to set the calendar for our coaching of CKLA Amplify. All K-5 classroom teachers/paras, special education teachers, reading specialists, etc. will be involved in this training.

- ii. How is training time typically split between district-led and school-led?

All of our training will be district led due to the small nature of our district.

- iii. How do we adjust time for different groups?(new teachers)

We will be all together.

- iv. Who decides how to use the time? Who typically facilitates?

Administrative staff plans and facilitates the trainings.

- v. Do we have additional incentives or structures that encourage independent study?

Yes, we hoping to use our Title II monies for pd during the summer.

NOTES

Take stock on your current approach so that you know what time you can leverage.

The answers to these questions may vary by school.

II.5.B: STUDY THE TRAINING AND PD RESOURCES THAT COME WITH YOUR MATERIALS

GUIDING QUESTIONS

i. What are the built-in training and professional development resources that come with the curriculum?

There is a charge for the three stages of CKLA training. It is all purchased separately. There are some training videos and resources online available with the purchase. We would like to be a part of the PLC group.

Don't forget to explore other options, such as videos and support tools, that other groups may have created, especially if you are using an open source set of materials.

NOTES

Most materials come with an overwhelming number of resources and support tools, which are great (and they're what you're paying for)! However, implementation leaders sometimes spend more money for training before understanding what they have already purchased and what they have available to them.

ii. What recommendations does the developer make about upfront or ongoing training?

CKLA Professional Development: I chatted with Mike Pickering yesterday about PD for districts that adopt CKLA. We're staying true to our K-2 and 3-5 training groups due to how the program is set up for primary vs upper elementary students, but there are some options in how teachers receive training.

- Remote training provides the most flexibility in the time and duration that teachers receive training. If a teacher needs to attend both K-2 and 3-5 trainings, they could split these across 4 days, 3 hours each day, or two 6-hour days.
- Remote training also allows for the option of Program Overview trainings, which are only 3 hours total for K-2 and 3 hours for 3-5. I will say this is a very high-level overview and does not provide as much in-depth guidance as the standard Initial Training (which is mentioned in the bullet point above).
- We would certainly encourage neighboring districts to join training sessions and share the cost as long as the participant cap remains under 30

iii. What trainings are offered by the developer?

Initial training for K-2 and 3-5 (separately): It's possible that one session may be provided for free, but it depends on your total quote price. These trainings would likely be done remotely in either a full 6-hour or two 3-hour sessions, at the rate of \$1500 each. Initial training is delivered prior to the start of the school year.

Strengthen: These sessions are topic-specific, such as Enhanced Planning and Practice, and can be done remotely in 3 hours for \$750 per group (K-2 and 3-5, separately). Strengthen training is often delivered in the fall (Sept.-Nov.) and sometimes again in the spring.

Coach: This can be done a variety of ways, but most commonly in a remote setting we see three 1-hour sessions (\$1000) or individual 1-hour sessions (\$350). K-5 are held together and not separated like in Initial and Strengthen training. These are 100% customizable to be whatever you want them to be. Coaching is often delivered in the spring, or even saved for Year 2 of implementation.

The resource [Materials Training Options](#) provides an overview of common training options with some pros and cons for each.

You will decide on your training approach in **Step II.5.D: Determine the plan and prepare the facilitators.** For now, you are gathering all options.

iv. How can we collaborate with other districts using these materials?

Yes, CKLA will allow districts to join together and split the costs as long as it remains under 30 people in attendance.

II.5.C: DETERMINE TRAINING NEEDS FOR EACH GROUP

GUIDING QUESTIONS

- i. What are the key training needs that each group has?

Initial, Strengthening, and Coaching

- ii. What are the priorities for upfront training? What are the priorities for each group for training over time?

Initial, Strengthening, and Coaching

- iii. Who are all the groups that need training on the instructional vision, expectations for students, and materials design across our system?

All K-5 classroom teachers, paras, and SPED teachers will be involved in this training.

NOTES

Do not start the training list with the curriculum demonstration needs. **Start with the vision that led you to select these materials in the first place.** Consider your Jagged Culture Profile and deep needs. **Your materials are in service of your vision and expectations for students.**

The resource [Common Materials and Vision Training Needs](#) lists common training needs for vision and curriculum implementation.

Look back at the training needs you surfaced in all previous steps.

Be sure to include all educators that support all students that will use these materials, including a plan for any teachers that will start the year late.

The resource [Groups Who Will Need Training](#) is a list of educator groups that you can use to make sure you have thought through all potential groups.

II.5.D: DETERMINE THE PLAN AND PREPARE THE FACILITATORS

GUIDING QUESTIONS

i. What are our options for who facilitates the training?

CKLA Amplify a question has been posed to them about flexibility in their sessions and who will be our trainer.

ii. What is our budget?

1. The grant money \$47,934.40 plus the left over monies from the travel expenses for the reading conferences.
2. There is \$6,400.00 budgeted for professional development days in Title IIA of which zero has been expended. In the narrative it is written \$400/day. There is also \$2,800.00 in Non Cert salaries for the same purpose – professional development.
3. We were able to release some \$\$'s from ESSER III, so if the textbook purchase are less than \$20K we can use those funds. Someone could complete a PO and it can be processed in July.

iii. What are the overarching priorities for training for each group?

Initial, Strengthening, and Coaching

iv. What is our training plan?

We are working on several different options.

v. What is the high-level agenda for each group (upfront and over time)?

Not sure at this time.

NOTES

Get clear on your prioritized needs first (in the previous step) in order to go into this step knowing what you need to invest in most.

The resource [Materials Training Options](#) gives an overview of common training options.

Consider the key messages that you want each group to hear during training. Be sure to include **training on the vision for excellent instruction** so that each group is able to see how the materials support the vision.

II.5.D: DETERMINE THE PLAN AND PREPARE THE FACILITATORS (CONT.)

GUIDING QUESTIONS

- vi. Who is responsible for supporting quality content across all training?

The district administration

- vii. Who is responsible for the logistics?

The district administration

- viii. What is the review process for materials that are created in-house?

N/A

- ix. What is our agenda for each group?

N/A

- x. What do all facilitators need to know about our vision and core beliefs in order to reinforce the right messages?

That we live in a small town with no instructional coaches, no curriculum director, and limited resources. We all wear numerous hats.

NOTES

Your culture is a product of cumulative experience. If every session reinforces the same vision and core beliefs, they will be much more likely to add up to a clear picture of success. The only way to make this happen is to tell everyone the vision and core beliefs you want them to reinforce (and follow up to make sure they do).

Bookend any trainings you are sending teams to with opening and closing time to connect it to the big picture and vision for excellent instruction.

II.5.D: DETERMINE THE PLAN AND PREPARE THE FACILITATORS (CONT.)

GUIDING QUESTIONS

xi. What are the objectives of the session?

To familiarize our staff with the CKLA curriculum materials.

xii. How will we know if participants have mastered the training objectives?

We will ask them to complete a survey.

xiii. What is the learning plan?

Fall Inservice
Strengthen Sessions
Coaching Sessions

xiv. What engagement have we included in the design to respond to adult learning needs?

CKLA Amplify has designed the training.
Classroom observations of teachers classrooms, collaborations.

xv. What materials and technology will we need?

We have the necessary technology.

xvi. How will we collect data at the end of the session?

Not sure if CKLA Amplify has a survey or measurement?
Creating a google form for teacher reflection of trainings.

NOTES

This set of guiding questions can be considered for each training session.

The resource [Email for External Trainers](#) is a sample email template that you can adapt and use to give any external trainer context on your needs and priorities.

Trainings are measured in various ways, such as survey data, work products (i.e. student work review or an annotated lesson), knowledge assessments, or transference to practice. Be sure to determine your measures for success up front.

II.5.E: ORGANIZE NEXT STEPS AND COMMUNICATE THE PLAN

GUIDING QUESTIONS

- i. In this key action, we determined our training plan. What are the next steps that we need to take based on the decisions we made together?

We need to get our quotes (including trainings), set/schedule dates for pd.

- ii. What can we add to our roles and responsibilities tracker based on the work we outlined in this key action?

At this time we do not need to add anything to our roles or responsibilities.

- iii. What adjustments do we need to make to our plans for supporting, planning, or coaching based on our training plan?

At this time we do not need to make any adjustments to our plans.

- iv. What will each identified stakeholder group want to know about the training plan?

We feel that our stakeholders will want to know when, where, and what.

- v. How do we plan to proactively communicate this information? Who will deliver the communication? When?

This will be delivered in the extra stipends for training after school is out and in the fall inservice document.

- vi. What questions do we expect we will get? How will we answer them?

We anticipate that there will be no questions. We will have everything needs to learn and dig in.

NOTES

Now that you have finished your plans for the [Three Pillars of Teacher Support](#), stop to make sure that the plans are aligned and provide coherent support for teachers.

As outlined in **II.4.D: Organize next steps and communicate the plan**, communicating the plan for training, planning, and coaching teachers in one communication can avoid confusion or redundant communication streams. Use the resources [Email Communicating Support Plan: Training, Planning, and Coaching](#) and [PowerPoint Communicating Support Plan: Training, Planning, and Coaching](#) as a starting point to communicate your process.

II.1 CONTINUED

II.1. D: REVISIT AND SET IMPLEMENTATION GOALS AND DETERMINE HOW YOU WILL MONITOR PROGRESS (p. 17)

GUIDING QUESTIONS

- i. What, if any, adjustments do we need to make to our draft goals for implementation?

At this time we do not need to make any adjustments.

- ii. How will we know if we reach our goals?

Teachers will be using it in the classroom.

- iii. For each goal, when will we know if we are on track?

Training will be completed with an attendance log.

- iv. What data will we review?

Attendance data.

- v. Operationally, what needs to happen to get this data?
Who is responsible?

The administrative team will be responsible for getting this data and analyzing it.

- vi. In addition to monitoring progress, how will we collect stakeholder feedback?

Through DIBELS and MAP data.

- vii. When will we step back to review our progress toward our goals holistically? Who will be part of these stepbacks?

Data will be reviewed and looked at monthly for each grade level. Fidelity checks will happen daily by classroom teacher and biweekly by building admin walkthroughs.

- viii. Who should each group of stakeholders go to with questions?

Principal or ELA Committee

NOTES

You first established draft wishes and goals in Step C: Draft the Goals for Successful Implementation.

Goals tend to stay fairly stable for the year, but you will have the opportunity to evaluate and adjust the measures every quarter in Phase III, Key Action 2: Step back and adjust the plan.

The resource [Progress Monitoring Plan and Approaches](#) includes common progress monitoring approaches for the frequently used goals.

There will likely be both system and school level progress monitoring needs.

For school level roles and responsibilities, you can see sample distributions and guidance in the [Roles and Responsibilities Matrix](#).

The [Stakeholder Feedback Survey](#) includes sample questions that can be asked for periodic feedback.

Early implementers benefited from regular opportunities to bring the team together to look at how things were going and adjust course. [Progress Monitoring Practices](#) shares some best practices around progress monitoring and frequency suggestions, and the resource [Challenge Solving Protocols](#) outlines some effective protocols to share emerging challenges.

II.1. E: REVISIT ROLES AND RESPONSIBILITIES AND SET THE PLAN (p. 18)

GUIDING QUESTIONS

- i. Go back to the roles and responsibilities list. Does anything need to change?

Nothing at this time needs to change.

- ii. Are the roles and responsibilities clear? Are there places of potential overlap or confusion?

Yes, as much as possible. We won't know until we have tried to use these materials in our classrooms.

- iii. Does any group or one person have an unreasonable workload? What can we do to prioritize and reassign?

Most of our teachers

- iv. For each workstream, what are the key activities and deadlines?

PD: initial, coaching, strengthening
Meeting Norms with checklist
Aligning PD with regularly scheduled meetings.

- v. How will we check in to ensure that all of the work gets done?

During our monthly team meetings we will make sure the work gets done or is on track to getting done.

- vi. Are our systems for planning, coaching, and training aligned and coherent?

These will all be coherent and aligned with the completion of the 2023 master schedule.

- vii. What are we going to do as an Implementation Support Team to celebrate finishing this important planning work?

Grant funded all expense trip to Hawaii.

If only!

NOTES

Step back from this list and make sure the distribution of work makes sense.

Setting up decision-making protocols in advance will make things easier down the road.

Double check that the people who are assigned roles and responsibilities are aware of their roles and responsibilities and the timeline for moving forward.

Review the plans you developed for supporting planning, coaching, and training in Key Actions II.3–II.5. These represent your [Three Pillars of Teacher Support](#). Make sure that these systems work together to support teachers and ensure that teachers are getting consistent messages and feedback about how to utilize materials.

You have finished Phase III! You should now have a clear plan for implementation support. Next, it is time to launch the work.

Find a list of ways that you can celebrate in the resource [Celebration Ideas!](#)





Stage THREE

IMPLEMENT and Teach + Learn

OVERVIEW

The goal of Phase III is to support teachers as they use the curriculum to inspire great instruction and increase student learning. At the leadership level, the focus is on listening to teachers and observing practice with a goal of continuously improving teacher support. Phase III does not end after the first year — this is a continuous improvement journey that never ends.

Successful early implementers:

- Had a plan for implementation (see Phase II)
- Followed the plan and did the work
- Listened carefully, with openness to adjusting the plan
- Watched the work in action at every level to understand what was working and what was not
- Gathered together to step back and adjust the plan
- Shared the adjustments transparently in the spirit of continuous improvement

III. 1: WORK THE PLAN AND GATHER DATA

Phase III: Learn >	Key Action III.1: Work the Plan and Gather Data	Step III.1.A: Train, Plan, and Coach Teachers
	Key Action III.2: Step Back and Adjust the Plan Key Action III.3: Annually Reset	Step III.1.B: See the Work in Action and Listen to Questions and Concerns Step III.1.C: Check in to Track the Trends and Solve Quick Problems

WHAT IS THE GOAL?

The goal of this key action is to enact the plan you developed in Phase II, observe what works and what does not, and listen to feedback. In particular, this key action is about effectively enacting your plans for supporting teachers that you outlined in Key Actions II.3-II.5.

WHY IS THIS KEY ACTION IMPORTANT?

Plans tend to fall along a spectrum. On one end, they are printed documents, put away in a binder on the shelf and gathering dust, and on the other end, they are **living, breathing drivers of the work that are shared across a team**. This key action is where the rubber meets the road and everyone begins to enact the plan. It can be difficult to lose momentum or focus when confronted with the daily pulls and pressures of school life. This key action builds on the plans determined at the end of Phase II for progress monitoring, and focuses on consistent reflection. One of the differentiators between successful implementers and implementers who struggled was their ability to support teacher practice.

The work of the [Three Pillars of Teacher Support](#) is challenging because of the diversity of factors involved such as instructional culture, team expertise, structural support, etc. As you go through this key action, it can be helpful to return to your plans in Phase II, Key Actions 3–5 to see where to improve. In the next key action, teams come together to compare notes, reflect, and adjust. In this key action, the team's charge is to do the work, observe the outcome, and listen closely to all involved.

EXPLANATION OF LANGUAGE

We use the term **check-in** to refer to a meeting of the Implementation Support Team focused on monitoring progress and solving any problems.

III.1. A: TRAIN, PLAN, AND COACH TEACHERS

GUIDING QUESTIONS

i. What is the plan?

ii. What are the key deadlines? Are we on track?

iii. What needs to happen to get the work done at a high level of quality?

iv. What, if anything, is pulling focus? What needs to change to get the work done well?

v. When are we checking in as a team to make sure the plan is on track?

vi. What questions do we need to discuss?

NOTES

This step hinges on the work of Phase II — specifically, relying on your

[Implementation Plan](#) assembled across all of the key actions in Phase II.

The resource [Project Planning Check-In Agenda](#) provides a sample agenda for a

project planning check-in — a dedicated time to bring the Implementation Support Team together and allow for implementation problem solving and day-to-day discussion in service of the plan.

Training, planning, and coaching is about 1. setting up the structures to ensure that

these supports happen (which you planned for in Phase II) and 2. making sure these supports are effective and leading to growth towards your goals. In Phase II, Key Action 3, Step E: Determine how you will support collaborative and individual planning, you diagnosed your professional learning system using the [Practice What You Teach Checklist for Schools and Systems](#). Revisit this checklist to guide your teacher support work.

III.1.B: SEE THE WORK IN ACTION AND LISTEN TO QUESTIONS AND CONCERNS

GUIDING QUESTIONS

i. How is implementation going?

ii. What is going well?

iii. Where are we having challenges?

iv. What else do we need to see?

v. What are we hearing?

vi. What questions are we getting?

vii. What can we answer easily? What questions are more challenging?

viii. How are stakeholders responding to the materials?

ix. What concerns can we address easily? What concerns are more challenging?

NOTES

Be sure to observe at every level of implementation to gather a picture. The resource [Implementation Observation Guidance](#) is a list of the key interactions and look fors that early implementers benefited from observing in order to understand how things were going. Some early implementers created shared documents to pool observations and impressions.

You can use the resource [Implementation Observation Log](#) to log questions and observe trends.

Listen to questions, concerns, and feedback. Listen for the pattern underneath the questions and listen for where the concerns are coming from.

III.1.C: CHECK IN TO TRACK THE TRENDS AND SOLVE QUICK PROBLEMS

GUIDING QUESTIONS

- i. How are things going across our implementation plan?
What has taken place? How did it go?

- ii. What questions are we getting?

- iii. What can we celebrate and share?

- iv. What can we refine and adjust?

- v. What else do we want to observe and listen for before our next meeting?

- vi. What is the next set of work coming up?

NOTES

Teams benefit from meeting **briefly but regularly** to support each other in the work of the plan. These quick check-ins allow for quick problem solving and adjustments. Quarterly, the team benefits from a broader stepback to take stock on the whole story and make bigger adjustments, which you will plan in Key Action III.2: Step back to reflect on progress and challenges.

The [Project Planning Check-In Agenda](#) is a sample agenda for regular team check-ins, including ones that early implementers used.

III. 2: STEP BACK AND ADJUST THE PLAN

Phase III: Learn >	Key Action III.1: Work the Plan and Gather Data	Step III.2.A: Prepare Data for the Stepback
	Key Action III.2: Step Back and Adjust the Plan	Step III.2.B: Step Back to Reflect on Progress and Challenges
	Key Action III.3: Annually Reset	Step III.2.C: Adjust the Plan and Communicate the Changes

WHAT IS THE GOAL?

The goal of this key action is to examine progress to goals, identify key successes, and learn from and solve for significant challenges. After analyzing the data and considering key drivers, the team will adjust the plan for the next chapter of work.

WHY IS THIS KEY ACTION IMPORTANT?

While the team meets consistently during the year to monitor progress and keep the work moving forward, a formal stepback at a larger interval of time allows for deeper reflections and gives the team an opportunity to get out of the day-to-day challenges and take stock of overall progress to your goals. This is the time to look at the whole picture and decide what to do. Listening and adjusting builds investment and confidence, and it allows everyone involved to be more efficient in spending energy in ways that support progress.

EXPLANATION OF LANGUAGE

We use the word **stepback** as a noun to refer to the actual meeting that takes place with the Implementation Support Team and **step back** as a verb describing the collective act of gaining perspective on the whole story. We use the term **quarterly** to refer to the practice of doing these stepbacks each quarter, although we have seen some early implementers benefit from more frequency in the first three months. **Data** refers to quantifiable data (i.e. student scores or survey results) as well as qualitative data (i.e. observation notes).

III.2. A: PREPARE DATA FOR THE STEPBACK

GUIDING QUESTIONS

i. What are the goals for the meeting?

ii. What data do we need to gather to report on our progress to goal?

iii. Is there additional stakeholder feedback we need to gather?

iv. What is our agenda? Who will facilitate which portions?

v. What meeting norms do we need in place to create a productive, supportive, and solutions-oriented discussion?

vi. What pre-work, if any, will there be for the meeting?

vii. How will we communicate the agenda, goals, and pre-work?

NOTES

The resource [Quarterly Stepback Agenda and Email](#) is a sample agenda with an adaptable email that you can send. You can also use the sample [Quarterly Stepback Data Gathering Template](#) to collect all data and stakeholder feedback in one place. You can also reference the notes in the [Implementation Observation Log](#) you used in **Step III.1.B: See the work in action and listen to questions and concerns.**

Sharing and discussing data openly can be scary and trigger feelings of evaluation for team members, particularly when looking at data broken out by any subgroups (i.e. specific grade levels, schools, etc.). Setting team norms around meeting culture can help make the discussion more productive for the team. The resource [Quarterly Stepback Meeting Norms](#) includes some sample norms that you can use as a starting point.

Ensure you are disaggregating the data where possible to evaluate for equity.

Consider your Jagged Culture Profile here. Are all student groups getting access to the same experience and expectations?

III.2.B: STEP BACK TO REFLECT ON PROGRESS AND CHALLENGES

GUIDING QUESTIONS

i. Where are we on pace to meet our goals?

ii. What are the drivers of success?

iii. How can we best celebrate these successes?

iv. Where are we off track to meet our goals?

v. What is holding us back from meeting those goals?

vi. What are the 2–3 areas we want to improve in next quarter?

NOTES

Reference your agenda, sample norms, and templates for organizing data for the conversation that you laid out in Step A: Prepare data for the stepback.

If the results are clear about some areas for improvement, add additional guiding questions in advance to focus on the root cause and potential solutions for those areas.

While it's tempting to try to solve everything at once, it can be helpful to focus on 2–3 improvements and keep the rest on a running list for potential changes to revisit.

In the next key action, you will adjust your plan and determine what you are going to do in more precision.

III.2.B: STEP BACK TO REFLECT ON PROGRESS AND CHALLENGES (CONT.)

GUIDING QUESTIONS

vii. For each of the 2–3 priorities, what is the root of the problem?

viii. What needs to change?

ix. What are we going to do about it?

x. At our next stepback meeting, how will we know that these adjustments worked?

xi. What do we need to observe and what additional data do we need to collect next quarter to know if it is working?

NOTES

This step asks you to go back into your [Implementation Plan](#) to adjust the plan, as opposed to throwing the old plan out and starting from scratch.

The resource [Examples of Mid-Year Adjustments](#) is a set of examples of the kinds of adjustments that have been made mid-year towards different goal areas.

Leverage your bright spots and share learnings in your game plan.

III.2.C: ADJUST THE PLAN AND COMMUNICATE THE CHANGES

GUIDING QUESTIONS

- i. In this key action, we adjusted our plan. What are the next steps that we need to take based on the decisions we made together?

- ii. What needs to happen? Who will do it? By when?

-
- iii. What will each identified stakeholder group want to know about the adjustments to the plan?

Quarterly communications can be a great opportunity to celebrate the hard work of implementation and fuel the fire to keep continuously improving.

- iv. How do we plan to proactively communicate this information? Who will deliver the communication? When?

Listening and adjusting the plan builds confidence and trust, especially when every member of the team is on the same page and can describe the rationale in a way that is connected with the vision and core beliefs.

- v. What questions do we expect we will get? How will we answer them?

NOTES

Go back to your [Implementation Plan](#) to track your next steps and add to your roles and responsibilities tracker.

The [Email Communicating Adjustments After a Stepback](#) resource is a sample email from a system based on the adjustments they made.

III. 3: ANNUALLY RESET

	Key Action III.1: Work the Plan and Gather Data Key Action III.2: Step Back and Adjust the Plan	Step III.3.A: Prepare Data for the Annual Stepback Step III.3.B: Step Back as a Team to Reflect on Progress and Challenges Step III.3.C: Adjust the Goals and Plan for the Coming Year Step III.3.D: Celebrate Wins and Invest the Team in the Next Level of Work
Phase III: Learn >	Key Action III.3: Annually Reset	

WHAT IS THE GOAL?

The goal of this key action is to look back on the year, celebrate successes, name areas of growth, and define the next level of work for the following school year.

WHY IS THIS KEY ACTION IMPORTANT?

After going through multiple cycles of the improvement process throughout the school year, it is important to reflect on the year as a whole. The end-of-year reflection is slightly different than quarterly stepbacks. The data is different since there is access to summative data and there's an opportunity to dig into additional data sources that might have been missed during the school year.

Also, the context is different, with system and school leaders looking ahead to the next school year, particularly with an eye to changes in workforce. Schools change more dramatically from year to year than within a given year. The end of the year provides an opportunity to revisit the improvements list generated throughout the school year and consider which changes to tackle during the upcoming year and over the summer. It's a chance to reignite the fire for the team as well as institutionalize work started this school year.

EXPLANATION OF LANGUAGE

We use the term **annual planning** to reference end of one school year planning in preparation for the next year, but this can take place at any point in the spring or in two parts — once before data is back and again once all data is in.

III.3. A: PREPARE DATA FOR THE ANNUAL STEPBACK

GUIDING QUESTIONS

i. What are the goals of our annual stepback?

ii. How are we going to structure the conversation?

iii. What data do we need to gather to report on our progress towards our goals?

iv. Is there additional stakeholder feedback we need to gather?

v. What is our agenda? Who will facilitate which portions?

vi. What pre-work, if any, will there be for the meeting?

vii. How will we communicate the agenda, goals, and pre-work?

NOTES

Some leaders opt to do a series of stepback meetings with different groups of stakeholders. The resource [End-of-Year Stepback Guidance and Materials](#) provides an overview of the options with a sample agenda, including an adaptable email that you can send. You can also use the [End-of-Year Stepback Data Gathering Template](#) to gather all data and stakeholder feedback in one place. It might also be helpful to reference past notes from prior quarterly stepback meetings.

Ensure that you are disaggregating the data where possible to evaluate for equity, specifically for students in poverty, students of color, students with disabilities, and English language learners.

Sharing and discussing data openly can trigger feelings of evaluation for team members. Setting team norms around meeting culture can help make the discussion more productive for the team. The document [Quarterly Stepback Meeting Norms](#) includes some sample norms that you can use as a starting point.

The [End-of-Year Stepback Considerations for Staffing](#) resource has additional considerations for the annual stepback attending to workforce changes.

III.3.B: STEP BACK AS A TEAM TO REFLECT ON PROGRESS AND CHALLENGES

GUIDING QUESTIONS

i. Where did we meet our goals?

ii. What were the drivers of success?

iii. Where did we miss our goals?

iv. What held us back from meeting those goals?

v. What will be different next year?

vi. What are our goals for next year?

vii. How do we want to continue to manage and support implementation?

viii. What are the 2–3 focus areas we'll have as a system next year?

NOTES

Reflecting on the systems and processes that the team used to support implementation will help surface what to replicate or adjust for next school year. It can be helpful to reference old quarterly stepback notes. The [End-of-Year Stepback Agenda](#) is an example for this conversation.

After year 1, many curriculum leaders tend to emerge — teachers and leaders who champion the materials, teachers who are rock stars at utilizing the materials, and leaders who are savvy in supporting teachers. When considering needs for next year, identify these players to help lead the work the following school year. Sometimes questions surface during this step around the possibility of changing materials. We have found that most often, there are challenges with implementation due to planning issues in Phase II and recommend starting by revisiting those plans. Changing materials often has unintended consequences. It requires starting this entire change management process over again, which affects systems and structures and requires a substantial new set of learnings for all educators in the system. Changing materials can also disrupt student learning, particularly if you are using a set of materials with a specific pedagogical approach. We recommend proceeding with caution when considering a materials change if you already have high-quality, standards-aligned materials in place. [Considerations when Changing Materials](#) outlines factors to consider as well as the type of criteria that might lead you to change curriculum.

III.3.C: ADJUST THE GOALS AND PLAN FOR THE COMING YEAR

GUIDING QUESTIONS

i. What are our goals for this next year of implementation?

ii. How will we know that we have been successful?

iii. What changes will we make to our plans for next year?

iv. What work needs to be done this summer to support teachers and leaders that have been using the curriculum to prepare for the next level?

v. What work needs to be done this summer to support new teachers and leaders?

vi. When will we discuss progress across the coming year?

vii. Who will be responsible for what work? When is it due?

NOTES

The summer can be a critical time for training new teachers and doing systems planning for the next year of implementation. It can be helpful to make separate or specific plans for the summer, focused on teacher and leader training, updates to policies, and planning meetings for structures for supporting teachers and leaders.

The document [Goals for Implementation](#) shares an example of annual goals used by early implementers.

Go back through Phase II to rethink any systems that require adjustment.

III.3. D: CELEBRATE WINS AND INVEST THE TEAM IN THE NEXT LEVEL OF WORK

GUIDING QUESTIONS

- i. **What information does each stakeholder group need about our successes this year, lessons learned, and areas for focused improvement next year?**

- ii. **Who, how, and when will we share this information?**

- iii. **How do we invest the team in our 2–3 focus areas and keep forward momentum?**

NOTES

Remind everyone that this work is a journey and rekindle the original dreams and aspirations for students that led to this journey and make persisting in it worthwhile.

Share celebrations and wins across all stakeholders, naming what worked. Positive successes will reinvest people in the next level of work needed.

Find sample communications for the end of year 1 in the resource [Email for End-of-Year Communication](#).

The resource [End-of-Year Celebration Ideas](#) includes different ways to celebrate with your team at the end of a big year.

Appendix

REFLECTIVE IMPLEMENTATION CHECKLIST

This tool outlines the framework including all key actions, and the steps within each key action. For each key action, you can indicate the extent to which you've implemented or accomplished the action. This will help you determine where to focus your efforts and where you should begin your work in supporting materials. Steps already completed are highlighted in gray.

PHASE I. SELECT MATERIALS

KEY ACTION	IMPLEMENTED	NOT YET	PARTIALLY IMPLEMENTED	FULLY IMPLEMENTED	NOTES DESCRIBE PROGRESS
1. Plan your Process					
<ul style="list-style-type: none"> I.1.A Identify the Selection Team and Leader I.1.B Determine How the Final Decision Will be Made I.1.C Map the Schedule of Events I.1.D Form the Review Committee I.1.E Organize Next Steps and Communicate a Plan 					
I.2 Establish the Vision					
<ul style="list-style-type: none"> I.2.A Train the Selection Team and Review Committee I.2.B Articulate the Vision of Instruction and Core Beliefs 					
I.3 Develop the Rubric and Prepare for Reviews					
<ul style="list-style-type: none"> I.3.A Solicit Stakeholder Input I.3.B Develop the Rubric I.3.C Identify the Options You Will Review I.3.D Train the Review Committee on the Rubric and Process 					
I.4 Review, Pilot, and Decide					
<ul style="list-style-type: none"> I.4.A Conduct the Reviews and Gather Feedback I.4.B Pilot the Materials I.4.C Make the Final Selection Decision I.4.D Communicate Decision and Rationale 					
I.5 Procure and Distribute Materials					
<ul style="list-style-type: none"> I.5.A Understand Your Procurement Options I.5.B Place and Track Your Orders I.5.C Communicate a Realistic Timeline I.5.D Form the Review Committee and Distribute Materials 					

PHASE II. PREPARE TO LAUNCH

KEY ACTION	IMPLEMENTED	NOT YET	PARTIALLY IMPLEMENTED	FULLY IMPLEMENTED	NOTES DESCRIBE PROGRESS
1. Set Goals, Roles, and Monitoring Plan <ul style="list-style-type: none"> II.1.A Identify Implementation Support Team and Leader II.1.B Map out the Implementation Planning Process II.1.C Draft the Goals for Successful Implementation II.1.D Revisit and Set Implementation Goals and Determine How You Will Monitor Progress II.1.E Revisit Roles and Responsibilities and Set the Plan 					
II.2 Determine the Plan for Assessment and Grading <ul style="list-style-type: none"> II.2.A Study the Assessments in the Curriculum II.2.B Inventory All Currently Used Assessments for Purpose, Frequency, and Quality II.2.C Determine the Plan for Common Assessment and What You Will Do with the Data II.2.D Establish Grading Guidance for the New Materials II.2.E Organize Next Steps and Communicate the Plan 					
II.3 Determine Expectations for Use and the Plan for Collaborative Planning <ul style="list-style-type: none"> II.3.A Study the Design of the Materials II.3.B Ensure Every School has Appropriate Time in the Schedule II.3.C Determine the Yearlong Pacing Schedule II.3.D Establish Guidance for Common Use and Customization II.3.E Determine How You will Support Collaborative and Individual Planning II.3.F Organize Next Steps and Communicate the Plan 					
II.4 Determine the Plan for Coaching <ul style="list-style-type: none"> II.4.A Understand Your Current Coaching Practices II.4.B Establish Your Observation and Coaching Tool II.4.C Determine How You Will Support Those Responsible for Coaching II.4.D Organize Next Steps and Communicate the Plan 					
II.5 Determine the Plan for Training Teachers and Leaders <ul style="list-style-type: none"> II.5.A Understand Available Training Time and Current Plans II.5.B Study the Training and PD Resources that Come with Your Materials II.5.C Determine Training Needs for Each Group II.5.D Determine the Plan and Prepare the Facilitators II.5.E Organize Next Steps and Communicate the Plan 					

OPTIONAL

OPTIONAL

PHASE III. IMPLEMENT: TEACH AND LEARN

KEY ACTION	IMPLEMENTED	NOT YET	PARTIALLY IMPLEMENTED	FULLY IMPLEMENTED	NOTES DESCRIBE PROGRESS
1. Work the Plan and Gather Data					
<ul style="list-style-type: none"> III.1.A Train, Plan, and Coach Teachers III.1.B See the Work in Action and Listen to Questions and Concerns III.1.C Check in to Track the Trends and Solve Quick Problems 					
III.2 Step Back and Adjust the Plan					
<ul style="list-style-type: none"> III.2.A Prepare Data for the Stepback III.2.B Step Back to Reflect on Progress and Challenges III.2.C Adjust the Plan and Communicate the Changes 					
III.3 Annually Reset					
<ul style="list-style-type: none"> III.3.A Prepare Data for the Annual Stepback III.3.B Step Back as a Team to Reflect on Progress and Challenges III.3.C Adjust the Goals and Plan for Coming Year III.3.D: Celebrate Wins and Invest the Team in the Next Level of Work 					

SELECTION PLAN

This template is a place to record projects and tasks that your team will take on during selection.

Modify this to a format that works for your team. At the bottom of the template, there is a list of sample projects and tasks to help you get started.

Decision-Making (set in Set goals, roles, and monitoring plan, Key Action II.1.E):

KEY DECISION	WHO IS RESPONSIBLE FOR MAKING IT?	WHO WILL CONSULT?

Key Stakeholders and Communications (set at the end of each step in Phase II):

STAKEHOLDER GROUP	COMMUNICATION CHANNELS	COMMUNICATIONS NEEDED

Schedule of Events (set in Map the schedule of events, Key Action I.1.C):

KEY EVENT (INCLUDE IDEAL SELECTION DATE)	DATE

Vision:

Core Beliefs:

Jagged Culture Profile Considerations:



Work Plan:

Below are descriptions of some of the terms across the top row.

- **Project:** describes the bucket of work; many organize projects by key action (i.e. coaching)
- **Task:** describes an action step in the project (i.e. determine who will lead upfront materials training)

PROJECT	TASK	OWNER	DEADLINE

Sample projects and tasks:

Project: Form the Review Committee

- Create role and responsibility doc for Review Committee
- Determine what roles need to be represented on the Review Committee
- Finalize criteria for Review Committee members
- Email committee to determine meeting availability
- Communicate who is serving on the committee to the system and share their role

Project: Leading the Review

- Train all Review Committee members on the rubric and selection process
- Review materials
- Determine plan for pilot
- Make final selection decision

IMPLEMENTATION PLAN

This resource is a template for keeping track of all of the projects and tasks that your team will take on during implementation. Before the work plan, there is space for recording major decisions and notes relevant to your work plan from across Phase I and Phase II: vision, core beliefs, goals, communications, roles and responsibilities, and decision-making process. This is meant to be a “one-stop shop,” but the format may not be right for your team. Modify as needed — add or delete sections, adjust tables and rows, or separate into multiple templates.

Vision:

Core Beliefs:

Goals (set in Set goals, roles, and monitoring plan, Key Action II.1.C):

GOAL AREA	GOAL(S)	MEASURES AND FREQUENCY	HOW WILL WE COLLECT AND ANALYZE DATA?	WHEN WILL WE STEP BACK AND ADJUST?
Teacher and Student Investment				
Teacher Practice				
Student Outcomes				

Key Stakeholders and Communications (set at the end of each step in Phase II):

STAKEHOLDER GROUP	COMMUNICATION CHANNELS	COMMUNICATIONS NEEDED

**Roles and Responsibilities (set in Set goals, roles, and monitoring plan,
Key Action II.1.E):**

PERSON / ROLE	RESPONSIBILITIES	TRAINING AND SUPPORT NEEDS

Decision-Making (set in Set goals, roles, and monitoring plan, Key Action II.1.E):

KEY DECISION	WHO IS RESPONSIBLE FOR MAKING IT?	WHO WILL CONSULT?

Work Plan:

Below are descriptions of some of the terms across the top row.

- **Project:** describes the bucket of work; many organize projects by key action (i.e. coaching)
- **Task:** describes an action step in the project
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PROJECT	TASK	OWNER	DEADLINE