Midwest Leadership Summit
September 13 and 14, 2007
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Kerry Bollman  KBollman@scred.K12.mn.us
Thanks to:
Elizabeth Jankowski,
Patrick Kennedy-Paine
Dave Howe
Action Planning: Presentation Overview

- Key Concepts and Vocabulary
- Critical Variables: Learning from High Performing Schools
- Key “Take Away” Points
- Practice and Application
- Resources and Tools
Key Concepts and Vocabulary

Action Planning: Two Major Components

1. Analyzing student achievement data across grades and risk statuses to determine which groups have not made adequate progress.

2. Creating action plans to improve performance for those groups of students.
Key Concepts and Vocabulary

Risk Status

- The degree to which a student is or is not at risk for falling below grade level.

- **Grade Level (GL):** Students who meet grade level expectations in RF progress monitoring assessments, outcome assessments, and in-program assessments.

- **Some Risk (SR):** Students who come into a grade somewhat below grade level.

- **High Risk (HR):** Students who enter a grade level significantly behind. These students have not learned many of the prerequisite skills assumed by the grade level comprehensive reading program.
Adequate Progress for Specific Groups

To do action planning you have to look at which specific groups in your school are not making adequate progress.
Five Ways To Define Adequate Progress

**FALL**

- At or Above Grade Level
- Some Risk
- High Risk K-1
- High Risk 2-3

**SPRING**

1. Grade Level
   - Some Risk
   - High Risk

2. Grade Level
   - Some Risk
   - High Risk

3. Grade Level
   - Some Risk
   - High Risk

4. Grade Level
   - Some Risk
   - High Risk

5. Some Risk
   - High Risk

Scott Baker 2005
Key Concepts and Vocabulary

Action Plan

- A *specific* step-by-step plan to improve student achievement.
- In response to *grade and group level data* that indicates inadequate student progress rather than *individual student data*.
- Developed by determining the possible cause(s) of inadequate group performance and creating plans designed to improve the group’s overall achievement.
Key Concepts and Vocabulary

Action Planning:

- Is done at the school level
- Is written by the school leadership team including the principal
- Allocates resources including the budget, schedule, assignment of personnel, school-wide assessments, role of the coach, etc.
- Ideally takes place in early summer for the upcoming school year so that arrangements for use of new materials or additional professional development can be made
- Should be adjusted when mid-year data comes out
Action Plans and Instructional Plans: Working Definitions

• **Action Plan: Changing the system**
  
  • A schoolwide instructional system in which resources are prioritized and delivery systems organized.
  
  • Adjusted in response to data several times a year.

• **Instructional Plan: Working within the system**
  
  • A plan for small groups or individual students whose needs are not fully met by the schoolwide system.
  
  • Adjusted frequently in response to data as needed.
Steps in Action Planning

1. Analyze Performance Data
   A. Collect school level data from each grade level
   B. Aggregate and display data
   C. Analyze data

2. Prioritize and Order Action Plans

3. Create Action Plans
Steps in Action Planning
1. Analyze Performance Data

A. Collect school level data from each grade level
B. Aggregate and display data
C. Analyze data
Steps in Action Planning

1. Analyze Performance Data

A. Collect school level data from each grade level showing:
   - the percent and number of students at grade level in the state outcome assessment at the end of the year and
   - the percent and number of students who made adequate progress in the three status level groups (GL/SR/HR)

B. Aggregate and display data

C. Analyze data
## Steps in Action Planning

### 1. Analyze Performance Data

| First Letter | Last Name | Fall ORF | Winter ORF | Fall HR | Fall SR | Fall GL | Winter HR | Winter SR | Winter GL | Spring ORF | Spring HR | Spring SR | Spring GL | Summer ORF | Summer HR | Summer SR | Summer GL |
|--------------|-----------|----------|------------|---------|---------|---------|-----------|-----------|-----------|------------|-----------|---------|---------|-----------|------------|-----------|---------|-----------|
| A            | Armstrong | 107      | 115        | +       | 106     |         | -         |           |           | -          |           |         |         | 1           | -          |           |         | 106       |
| B            | Ashbaugh  | 113      | 140        | +       | 141     |         | +         |           |           | -          |           |         |         | 1           | -          |           |         | 106       |
| C            | Brigh     | 103      | 136        | +       | 142     |         | +         |           |           | -          |           |         |         | 1           | -          |           |         | 106       |
| D            | Carter     | 102     | 106        | +       | 135     |         | +         |           |           | -          |           |         |         | 1           | -          |           |         | 106       |
| E            | Cypret     | 96      | 118        | +       | 110     |         | +         |           |           | -          |           |         |         | 1           | -          |           |         | 106       |
| F            | Eimer      | 171     | 168        | +       | 161     |         | +         |           |           | -          |           |         |         | 1           | -          |           |         | 106       |
| G            | Erschall  | 96      | 98         | +       | 107     |         | -         |           |           | -          |           |         |         | 1           | -          |           |         | 106       |
| H            | Gist      | 59      | 118        | +       | 101     |         | -         |           |           | -          |           |         |         | 1           | -          |           |         | 106       |
| I            | Gronke    | 79      | 32         | +       | 91      |         | -         |           |           | -          |           |         |         | 1           | -          |           |         | 106       |
| J            | How        | 124     | 150        | +       | 158     |         | +         |           |           | -          |           |         |         | 1           | -          |           |         | 106       |
| K            | Howe       | 80      | 89         | -       | 86      |         | -         |           |           | -          |           |         |         | 1           | -          |           |         | 106       |
| L            | Staff      | 129     | 148        | +       | 139     |         | +         |           |           | -          |           |         |         | 1           | -          |           |         | 106       |
| M            | Wood      | 78      | 116        | +       | 113     |         | +         |           |           | -          |           |         |         | 1           | -          |           |         | 106       |
| N            | Wyatt     | 112     | 134        | +       | 137     |         | +         |           |           | -          |           |         |         | 1           | -          |           |         | 106       |

**Notes:**
- HR, SR, GL stand for High, Standard, and Low, respectively.
- The table shows student performance data with columns for fall and winter, followed by spring and summer performance metrics.
### Steps in Action Planning

#### 1. Analyze Performance Data

**Instructions:** Enter your school and class names at the top of the sheet. Add student names in columns B and C, and assessment scores in columns F, G, and J as indicated. The adequate progress information will only update correctly if you use the buttons provided to the right of the table to manage the data. The Sort Data button sorts all students alphabetically by risk status. To add additional rows, select the cell under which you want to add rows, and press the Insert Rows button. The Remove Blank Rows button will remove all blank rows.

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## Steps in Action Planning

### 1. Analyze Performance Data

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### Notes:
- HR: High Risk
- SR: Standard Risk
- GL: Good Luck
Steps in Action Planning
1. Analyze Performance Data

A. Collect school level data from each grade level showing:

C. Aggregate and display data

C. Analyze data
<table>
<thead>
<tr>
<th>Grade</th>
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<td>% #</td>
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### Sample Data From a School

#### Summary of School Data

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<th>Outcome Data</th>
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Steps in Action Planning

1. Analyze Performance Data

A. Collect school level data from each grade level showing:

C. Aggregate and display data

D. Analyze data to determine areas of strength and concern among groups.
   - Groups of students not making adequate progress
   - Grade levels with too small a percentage reaching grade level reading performance
### Sample Data From a School

#### Summary of School Data

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Steps in Action Planning

1. Analyze Performance Data
2. Prioritize and Order Action Plans
3. Create Action Plans
### Steps in Action Planning

2. *Prioritize and Order Action Plans*

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<tr>
<th>Grade</th>
<th>Adequate Progress</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>High Risk Students</td>
<td>Some Risk Students</td>
</tr>
<tr>
<td>Kindergarten</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>First Grade</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Second Grade</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Third Grade</td>
<td>✔️</td>
<td>✔️</td>
</tr>
</tbody>
</table>

- Place a check in each box for which data indicates a written action plan is needed.
Steps in Action Planning

2. Prioritize and Order Action Plans

<table>
<thead>
<tr>
<th>Action Plan Number</th>
<th>Grade and Group(s) Targeted by Action Plan</th>
<th>Date Action Plan to be Created</th>
<th>Date Action Plan to be Implemented</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Grade 1 - Grade Level</td>
<td>6/5/2007</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Grade 1 - Some Risk &amp; High Risk</td>
<td>6/5/2007</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Grade 2 &amp; 3 - Some Risk &amp; High Risk</td>
<td>6/28/2007</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Identify different groups of students that can be served by the same action plan.
- Prioritize action plans for groups with high numbers of students.
Steps in Action Planning

1. Analyze Performance Data
2. Prioritize and Order Action Plans
3. *Create Action Plans*
Steps in Action Planning
3. Create Action Plans

- Relate plans to assessment data
- Be specific
- Tell what you will do differently
- Plan actions that are observable and measurable
- Provide sufficient detail so it is possible to determine when each action has been completed
Steps in Action Planning
3. Create Action Plans

What does specific mean?

Grade 3 High Risk

Not specific:
Time and Grouping: Use EFG Phonics program and teacher developed fluency work in the intervention time.

Specific:
Time and Grouping: Students will receive teacher-led instruction on phonics deficits using EFG Phonics program for 30 minutes in homogeneous groups. This will be followed daily by 15 minutes of fluency development at the students’ independent level.
Steps in Action Planning
3. Create Action Plans

- Organize plans around the critical variables for school actions.

<table>
<thead>
<tr>
<th>Materials and Instruction</th>
<th>Time and Grouping</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assessment and Data Utilization</td>
<td>School Organization and Support</td>
</tr>
<tr>
<td>Professional Development</td>
<td>School and District Leadership</td>
</tr>
<tr>
<td>Coaching</td>
<td></td>
</tr>
</tbody>
</table>
Steps in Action Planning

3. Create Action Plans

Action Plans: What Are the Critical Variables?
# Action Plan for Targeted Group

<table>
<thead>
<tr>
<th>School:</th>
<th>Date Created:</th>
</tr>
</thead>
</table>

Data that indicates the need for plan:

Staff who created this action plan:

<table>
<thead>
<tr>
<th>Area for Action Plan</th>
<th>Action to Be Taken (be specific enough so that it is possible to determine when the action has been implemented)</th>
<th>Person Responsible</th>
<th>Report on Progress of Implementation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Materials and Instructional Practices</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Time/ Coverage/ Mastery and Grouping Practices</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assessment Practices</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Data Utilization Practices</td>
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<tr>
<td>Schoolwide Organization and Support</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Professional Development</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Principal and District Leadership</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reading First Coach</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1 Enter "x" for New Summer
2 Enter "*" for New Mid Year
Making the Action Plan a Functional Document

- Share Action Plans with faculty and staff.
- Share the data that drives actions.
- Share detail of all actions.
- Leadership team should communicate progress on implementation throughout the year.
- Create schedule for regular leadership team meetings.
Learning From High-Performing Schools

- We studied six high-needs schools that produced significant gains in student reading performance.
- More high performing RF schools will be studied.
- We are providing information from those schools along with implementation experts’ opinions.
- The information is organized around the same critical variables that are emphasized in Action Plans.
Critical Variables

MATERIALS & INSTRUCTION
TIME & GROUPING
ASSESSMENT & DATA UTILIZATION
SCHOOL ORGANIZATION & SUPPORT
PROFESSIONAL DEVELOPMENT
SCHOOL & DISTRICT LEADERSHIP
COACHING
Materials and Instruction

Comprehensive Reading Program (CRP):

- The scientifically-based materials used by a school to provide reading instruction to their students.

- Schools ensure that critical skills for each grade level are taught explicitly and systematically each day.
Materials and Instruction

Supplemental Materials:

- Materials that are used with all students when the comprehensive reading program is deemed to not adequately address instruction in a particular component.
Materials and Instruction

Intervention Materials:

- Instructional materials that provide more intensive instruction on one or more component(s) of reading to Some Risk and High Risk students.
Materials and Instruction

Intervention/Replacement Core Program:

- Instructional materials that provide more intensive instruction on the most critical skills from all five components of reading to High Risk students. These materials may replace the regular comprehensive reading program and are used with High Risk students.
Materials and Instruction

Intervention materials should include the following instructional design features:

a. Clear models
b. Language controlled for clarity
c. New skills introduced at realistic rate
d. Carefully selected examples in exercises
e. Content sequenced for student success:
   1. pre-skills introduced before the strategy is presented,
   2. items likely to be confused, (e.g., the letters b and d) are introduced with separation

continued
Materials and Instruction

An intervention materials should include the following instructional design features:

f. Adequate practice provided for mastery

g. Adequate review provided for retention

h. Assessment package for placement and frequent progress-monitoring

i. Directions for reteaching as well as accelerating
Materials and Instruction

Overall School Plan

- Plan is designed to keep grade level students at grade level and accelerate students at some risk and high risk toward grade level as quickly as possible

- Plan includes criteria for which students receive which materials, when, how often, and how long

- A lot of a little, not a little of a lot
Time and Grouping
Students at mid to high Grade Level

- more than 90 minutes in the CRP
- small group instruction as needed for any skills not mastered as indicated on in-program tests
- instruction for higher level vocabulary and comprehension instruction or perhaps work on standards for higher grades
Time and Grouping
Students at low Grade Level or Some Risk

- initial instruction in the CRP sufficient for both whole class and small class instruction (90-150 minutes)
- preteaching or reteaching of skills for students who need extra time to master grade level skills, usually 15-30 minutes within or outside of the reading block
- systematic intervention instruction to fill in assessed gaps from previous grades, usually 30-60 minutes outside of the reading block
Time and Grouping
Students at High Risk

Option A - Grade level CRP is used

• initial instruction in the CRP sufficient for both whole class and small class instruction (90-150 minutes)

• preteaching or reteaching of skills for students who need extra time to master grade level skills, usually 15-30 minutes within or outside of the reading block

• systematic intervention instruction to fill in assessed gaps from previous grades, usually 30-60 minutes outside of the reading block

• and more time, e.g., after school, summer school, tutors, etc.

OR
Time and Grouping
Students at High Risk

Option B - Intervention core is used

• Sufficient small group instruction to reach grade level ASAP
  ✦ A 30 minute session for language instruction
  ✦ Large group comprehension and Two 30-45 minute small group sessions on phonics and text reading
  ✦ Vocabulary instruction (30–60 minutes)

In option A or B above:

• School is organized so students can be in groups of sufficient size for their need (i.e., students with more intense needs in smaller groups).
Assessment and Data Utilization

• The school plan includes schedule for administering Reading First and in-program assessments at the beginning of the year and throughout the year

• Assessments are administered more frequently to students below grade level

• Assessment of what is being taught in programs is part of the plan
Assessment and Data Utilization

Most importantly

Grade-level Team Meetings result in specific instructional plans for individuals and groups designed to improve the rate of progress.

Plans include such changes as more time, smaller groups, and more effective teaching principles.
Key Elements in Making Adjustments to Maximize Student Reading Achievement

1. Instructional delivery
   a. Improve skills in knowing how to efficiently accelerate SR and HR students through instructional programs (professional development)
   b. Improve delivery skills of person teaching (coaching)
   c. Change person teaching

3. Grouping
   a. Change group membership
   b. Make group smaller
   c. Make group more homogeneous
Key Elements in Making Adjustments to Maximize Student Reading Achievement

3. Time
   a. Increase time within/outside school day and school year

5. Instructional Materials
   a. Change placement in program
   b. Add scaffolding to program
   c. Add additional programs (supplemental or intervention)
   d. Change program

NOTE: These options assume that data is available and trustworthy
School Organization and Support

- Instruction is aligned, particularly for students below grade level. A lot of a little, not a little of a lot.

- Resources (paras, sped. ed., Title 1, etc.) are prioritized

- Each teacher has the means to provide each student with the necessary quantity and quality of instruction.
Professional Development

• All instructional staff have been provided sufficient training in the programs they are using—comprehensive, supplemental, intervention, and intervention/replacement core

• In addition, on-going, in-classroom program specific professional development is being provided. (coaching and consultation)
Professional Development (continued)

- Training in classroom management, data utilization, effective teaching principles, is being provided.

- Training is differentiated for different teachers.
School and District Leadership

• The principal attends professional development, examines student data regularly, and visits classrooms to support effective implementation.

• The principal is knowledgeable about RF principles as well as the CRP and intervention programs used in the school.

• The district leaders examine data regularly and strongly encourage actions that will lead to better achievement.
Coaching

• The coach provides the teachers with in-classroom modeling and support

• The coach analyzes data, helps create instructional plans, and helps implement the plans.

• The coach receives adequate professional development to carry out all these responsibilities.
Summary: How High Performing Schools Bring the Children to Grade Level and Keep Them There

- Ensure the program for all students, particularly those behind is highly aligned (M & I)
- Provide teaching that is highly systematic, explicit, and interactive (M & I)
- Ensure all programs used are highly effective (M & I)
- Place students at instructional level for amount of instruction needed to bring child to desired goal (T & G)
- Provide frequent monitoring of students’ progress (A & DU)
- Start instruction on first days of school and provide instruction every day (SO & S)
- Make very timely adjustments when a child or group is not progressing (A & DU)
- Prioritize budget to ensure adequate staff for needed small-group instruction (SO & S)
- District and school leadership are knowledgeable, examine data regularly, and make critical changes as necessary (L)
- Ensure coaches, teachers and aides receive needed initial and on-going training to learn to use programs (PD)

M & I = Materials and Grouping       SO & S = School Organization and Support
T & G = Time and Grouping             L = Leadership
A & DU = Assessment and Data Utilization  PD = Professional Development
Key “Take Away” Points

- Action Planning works at the school level and is in response to school and grade level data.
- The building administrator takes the responsibility for Action Planning.
- The Reading First leadership team should carefully consider the possible causes of inadequate progress before selecting critical variable options.
- All actions should be specific enough so that it is possible to determine when the action has been implemented.
Action Planning
Practice and Application

1. Sample Action Plans
2. Practice Evaluating an Action Plan (Dando)
3. Practice Writing an Action Plan (Monroe)
Caveat

The purpose of presenting these samples is to illustrate the Action Planning process and not to suggest any one way of organizing a school.
Resources & Tools

- Summary of School Data Table
- Action Planning Workbook
- Key Elements in Making Adjustments
- Sample Action Plan for
  - K - High Risk
  - 1 - Some Risk and High Risk
  - 1 - Grade Level
  - 2 - High Risk
  - 3 - Some Risk
- Grade Level Yearlong Adequate Progress Table