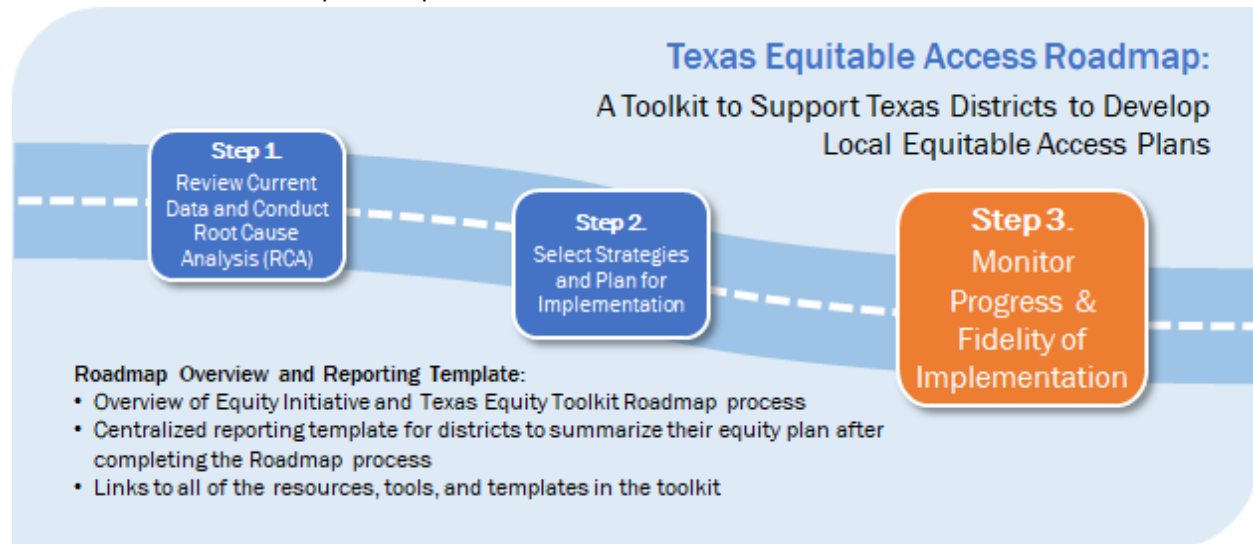


Step 3: Monitor Progress & Fidelity of Implementation

This is the third step in the Roadmap—an overview of the three steps can be found [here](#), with links to the resources for each step of the process.



Purpose

In the third and final step in the Texas Equitable Access Roadmap, districts finalize their Equity Plans. This tool walks districts through the process of reviewing key benchmarks that are prioritized during implementation and establishing a process to track the progress of implementation of strategies identified in *Step 2. Select Strategies and Plan for Implementation*. To do this, the team will create a progress monitoring plan. This plan has a simple yet important purpose: to let districts know whether their Equitable Access Plans are being implemented as planned *and* are helping them achieve their equitable access goals (i.e., to close district equity gaps).

In this section, you will use the information generated from earlier activities, data review and analysis (*Step 1*), and selecting strategies (*Step 2*) to develop a progress monitoring plan so you can effectively evaluate and track progress toward equitable access. You will use the results from this process to reflect and improve your plan on an ongoing basis.

Step 3 is organized into two tasks:

- Task 1. Develop a progress monitoring plan
 - Assemble a team that will be responsible for the development and implementation of the plan.
 - Use or develop a progress tracking sheet that indicates the equity gap and the benchmarks that are directly aligned to each strategy.
- Task 2. Monitor progress and fidelity of implementation

- Discuss in detail the following to guide the formative equity progress check during the progress monitoring team meeting:
 - How is the strategy supporting your goal to eliminate each identified gap?
 - Currently, is there a need to refine, improve, or adjust to ensure that implementation of each strategy will achieve the desired outcome?

Stakeholder engagement

Share progress of the equity plan implementation to stakeholders to inform stakeholders about the district's commitment to implementing the equity plan and eliminating the identified equity gaps. This could include sharing updates in district and school meetings

[Planning for Engagement With Stakeholders in Designing Educator Equity Plans](#)

Task 1. Develop a Progress Monitoring Plan

Assemble a Team

Before you create your plan, it will be helpful to assemble a team that will track the implementation progress for each of the selected strategies and goals. Your team should be composed of district staff members who have the time, knowledge, and interest to help keep track of progress and the authority to make changes if necessary. Some suggestions for your team include:

- People who understand the strategies you are implementing and have enough expertise to determine if they are being implemented well. It is a good idea to choose some team members from the list you developed in *Step 2. Select Strategies and Plan for Implementation*.
- People who have enough time and flexibility to meet regularly. You may want to meet as often as once or twice a month early on, and then taper off once the work gets started. However frequently you choose to meet, the main purpose is to keep the work moving forward and to monitor often enough to catch issues before they become hard to fix.
- People with a variety of perspectives and from a variety of roles. This diversity will help you to generate ideas from multiple perspectives and communicate across areas and roles when necessary. You may wish to include stakeholders from your original team to ensure variety yet familiarity with your goals and plans.
- At least one person who can analyze and interpret outcome data.

Use the Step 3.1 tab of the Equity Planning Reporting template to compile the names of people from your district and community who will be part of the progress monitoring team and to delineate their potential areas of responsibility.

Gather Your Documents

Now that you have your team, gather the following documents to help you complete your monitoring plan:

- Your list of strategies from *Step 2. Selecting Strategies*
- The blank Progress Monitoring Plan Template in the Step 3.1 tab of the Equity Plan Reporting template

Complete Your Progress Monitoring Planning Template

Use your gathered documents and the following questions to help you complete the Progress Monitoring Plan Template in the Step 3.1 tab of the Equity Plan Reporting template.

Record and Further Define Strategies

The Progress Monitoring Planning Template uses the language and process of creating a logic model. Although a formal logic model is not required, it might be helpful to create one, especially if you are using many strategies.

Logic model development resources are available from:

- [The Kellogg Foundation](#)
- [Regional Education Laboratory Northeast and Islands](#)

During *Step 2. Select Strategies and Plan for Implementation*, your district team identified and selected strategies to use to close your equity gaps that are aligned to the identified root causes of equity gaps. *Each strategy that you have chosen should have its own progress monitoring plan*; record them in the top-left corner of the Progress Monitoring Plan Template. Some strategies may be complex; thus, it may be useful to break them into smaller sub-strategies. Your team should discuss each strategy in turn and make sure that the final progress monitoring plan has enough detail so that someone who is unfamiliar with your equity plan can understand how the strategy will be implemented in your district.

Examples of strategies:

- Provide monetary incentives for teachers who commit to teaching in our hard-to-staff schools that serve larger numbers of students of color or low-income students.
- Develop and implement training for school leadership teams on improving teaching conditions through data collection and data-driven action planning.
- Provide intensive mentoring support for induction of new teachers.
- Develop and implement training for all teachers around Culturally Proficient Instruction.

Define Outputs and Milestones

Outputs are evidence that the strategies have been used. To define outputs, think about what outcomes you might see right away if the strategies are being implemented as intended. These are the immediate responses to your strategies, and, generally, you will see evidence of quality implementation in the first 6 months. Each strategy should have at least one associated output and be as clearly defined as possible. Therefore, when possible, include deadlines and targets. These deadlines and targets will be your milestones and can be set for every 6 months over a 2-year period.

Consider Short-, Medium-, and Long-Term Outcomes

For each strategy, you'll need to identify outcomes that the strategy is designed to achieve in the short, medium, and long term. Definitions of each of these types of outcomes are provided below. The ultimate long-term outcome is to close the equity gaps in your district to ensure that all students have equitable access to excellent educators, regardless of race or income.

When defining your outcomes, consider thinking about outcomes through the lens of SMART goals.

Use SMART goals
to define your outcomes.

Outcomes should be SPECIFIC—as clearly defined as possible.

Specificity ensures that outcomes are MEASURABLE. When creating outcomes, be sure that you can answer the question, “*How would we measure this?*”

Outcomes must be ATTAINABLE. It is important to set goals that are challenging and realistic. It is especially important to make sure that outcomes are RELEVANT—they must represent a significant step toward equity in the district.

Outcomes should be TIME-BOUND—define not only long-term outcomes but also short- and medium-term outcomes.

If you need more ideas for how to measure your outcomes, you may want to look at the metrics you used from the Data Review Activity (from *Step 1. Review Current Data and Conduct a Root Cause Analysis* in the toolkit) or at the

measures you listed in the strategy template in *Step 2. Select Strategies and Plan for Implementation*.

Define Measurement

For each output and outcome you described, you will need to list the ways you will measure progress. What data will you use to help you know if this strategy is working? Sometimes the data will be easily captured (e.g., a count of the attendees), but at other times you may need to develop a way to measure progress (e.g., you may need to create a survey to help you know what was learned at the training).

Develop a Timeline

After you are finished, your team should determine milestones associated with each strategy identified in the district’s equitable access plan. The milestones should account for how long it takes to implement a given strategy and when data addressing it will be available. List the milestone for each output and outcome in the template to help you keep track. There is space for this information in the cells of the template that define each benchmark. As you go through your milestones, remember that this is a continuous improvement process that may require “cycling back” to steps you have already completed, such as the RCA. The planning for the implementation process will require you to analyze data to determine whether you have achieved your stated outcomes and examine progress on each strategy several times to monitor growth. This will allow you to measure successes and failures and to make any changes/course corrections necessary to be certain you are on track to achieve your goals.

District teams can use the [Equity Planning Template](#) to map out their timeline for monitoring progress against their short-, medium-, and long-term outcomes. We recommend starting this work by first listing your district’s long-term outcomes. These are your high-level goals that should occur in the next 2–5 years if your strategies are successful. Then, list the strategies your district will implement to address the root causes of the equity gaps in your district and your short- and medium-term outcomes.

Long-Term Outcomes: We expect to see these long-term changes in 2-plus years:

- The quality of inexperienced teachers’ instructional practices will improve.
- Equity gaps between high- and low-poverty schools will decrease.
- Achievement gaps between high- and low-poverty schools decrease by 50%.

Establish Your Meeting Schedule

The district team will establish a time and place to collect and review evidence of progress toward each goal and strategy. Your team may find the [Step 3. Resources](#) to be helpful in planning your timeline and meeting schedule. To make your meetings the most effective, you also may want to:

- Assign tasks to a specific person;
- Brainstorm where to get each data point and when it will need to be requested;
- Determine where the data will be housed and who will manage or maintain it; and
- Determine how data should be analyzed and presented to the team at the meeting.

Task 2. Monitor Progress and Fidelity of Implementation

Examine Implementation and Outcomes Data

If you need help generating a list of common barriers, you can look back at the GTL Center's [Monitoring Tool](#) for a list of barriers.

It may also be helpful to look back at the list of barriers and solutions you developed in *Step 4. Selecting Strategies*.

During each progress monitoring meeting, use the information completed from the Progress Monitoring Planning Template (see the Step 3.1 tab of the template) for each strategy or group of strategies to discuss the following questions.

- Did our team do what was planned for each strategy?
- Did the data we collected help us to know if the strategy was implemented?
- How much progress have we made toward our goals?
- Did any of the barriers we foresaw interrupt progress?
- Do we need to make any adjustments at this time?

Consider How to Improve and Sustain Promising Practices

During your monitoring meetings, your district team also will reflect on progress to determine whether the strategies have resulted in achieving the outcomes and goals in the district equity plan and thus should be sustained. Teams should meet at least biannually to reflect on the following:

- If the strategies have been successful, reflect on what has contributed to the success. Consider how to sustain the implementation of that strategy. What factors must be in place? How can it continue to be successful?
- If you have not met your short-, medium-, and/or long-term outcomes, reflect on the barriers. Why wasn't the strategy implemented? If it was implemented but did not lead to the expected outcome, was the strategy implemented with fidelity? Why not?

Discuss in detail the following to guide the formative equity progress check during the progress monitoring team meeting:

(1) How is the strategy supporting your goal to eliminate each identified gap?

(2) Currently, is there a need to refine, improve, or adjust to ensure that implementation of each strategy will achieve the desired outcomes?

Next Steps for District Equity Planning Group

Now that your team has engaged in data review and conducted a root cause analysis process (*Step 1*), identified equity plan strategies aligned to the root causes (*Step 2*), and developed a monitoring plan for each of your strategies (*Step 3*), it's time to put all of your planning together into a District Equity Plan.

First, take a moment to record a few key pieces of information from your completed progress monitoring template into the Putting It All Together section.

Putting It All Together: Incorporating Your *Progress monitoring and fidelity of implementation* Efforts Into Your Roadmap Reporting Template

The results of your efforts in *Step 3*.

Monitor Progress and Fidelity of Implementation should be

documented through completing the progress monitoring plan template in

the Step 3.1 Tab of the template. Note that the reporting template for Steps 3 is split between two tabs. The first tab (3.1) captures the process of the Pre-implementation planning that takes place in Task 1, including assembling a team and creating a progress tracking sheet in one continuous table. The next tab (3.2) focuses on the implementation of a district's Equity Plan and provides a place to capture data and progress toward outcomes for each 6-month period serving the monitoring of the fidelity of implementation of the Equity Plan. You will be able to directly transfer the findings below into the centralized [Equity Planning Template](#).

