

## Overview

### What's In It and How Should My Community Use It?

Developed by the Education Redesign Lab (the Lab), this toolkit is designed to facilitate communities' efforts to implement personalized systems grounded in what we call Success Plans. These are dynamic plans as well as processes for meeting all children and youth where they are and connecting them to the supports, services, and opportunities that they need to prepare them for promising futures.

The toolkit is intended to support the implementation of Success Plans over time, beginning with a focus on planning and early implementation during year one, broader implementation during year two, and ongoing refining and scaling during year three and beyond. These timeframes are approximate and communities may enter the phases of work at different intervals. We welcome feedback on these tools as well as suggestions for additional resources that might accelerate your community's progress.



### 10 GUIDING PRINCIPLES FOR SUCCESS PLANS

**WHAT:** Defines the Lab's overarching vision for Success Plans and identifies 10 guiding principles integral to all plans and implementation systems

**PURPOSE:** Use to guide the development of your long-term vision for Success Plans in your community



### GETTING STARTED RUBRIC

**WHAT:** Outlines three developmental stages of planning, implementation, and expansion across key categories

**PURPOSE:** Use to identify concrete actions to pursue during each stage of work and to set goals for advancing to the next stage.



### GETTING STARTED WORKSHEET

(companion document to the [Getting Started Rubric](#))

**WHAT:** Identifies what components you already have in place and what items you will need to address to advance your community's efforts

**PURPOSE:** Use to decide which components to prioritize depending on the stage of your work



### ACADEMIC AND NON-ACADEMIC METRICS TABLE

**WHAT:** Presents numerous options for academic and non-academic metrics at the child and youth, school, and community levels and contains corresponding data sources

**PURPOSE:** Use to select potential metrics to track and to identify data sources



### IMPLEMENTATION WORK PLAN TEMPLATE

**WHAT:** Provides a template for creating a work plan to guide your community's Success Plans development and implementation

**PURPOSE:** Use to make initial decisions about your community's implementation efforts

## 10 Guiding Principles

*Connecting All Students to What They Need to Thrive In and Out of School*

The Education Redesign Lab (the Lab), housed at the Harvard Graduate School of Education, is leading a national, silo-busting movement to build comprehensive, personalized systems of support and opportunity to ensure that **all** young people thrive. Based on our research and overarching theory of action, we have developed a set of principles to help stakeholders create personalized systems grounded in what we call **Success Plans**. These are dynamic plans as well as processes for meeting all children and youth where they are and connecting them to the supports, services, and opportunities that they need to prepare them for promising futures.



The Lab has identified the following **10 GUIDING PRINCIPLES** integral to all Success Plans and systems to support their implementation.

1

### **PERSONALIZED**

Celebrate each child's assets and use a customized approach to identify individual strengths, interests, and needs.

2

### **COMPREHENSIVE**

Offer a wide array of academic, health, and other support services to meet the needs of children and youth from cradle to career.

3

### **STUDENT-CENTERED**

Empower children and youth to discover and pursue their academic and non-academic strengths and interests, set short- and long-term goals, and identify needs.

4

### **EQUITABLE**

Target systemic gaps that disproportionately affect marginalized students and ensure that the development and implementation of Success Plans will increase access to essential supports and opportunities.

5

### **ACTIONABLE**

Establish clear strategies and processes for identifying and delivering supports and services to each child and youth both in and out of school.

6

### **RELATIONSHIP-DRIVEN**

Allocate appropriate staffing to jointly develop and implement the plans with students by fostering mutually respectful relationships, in addition to involving parents, families, and other adults in the process.

7

### **CROSS-SECTOR**

Provide coordinated, comprehensive services by establishing collaborative relationships with partner organizations across multiple sectors.

8

### **INFORMATION-DRIVEN**

Utilize feedback and data from multiple sources, including students, families, and a diverse set of agencies, to regularly assess impact on multiple outcomes and enhance the quality of services provided.

9

### **SECURE**

Use digital platforms that meet high standards of data security and protect student and family privacy.

10

### **SUSTAINABLE**

Identify long-term funding sources and create organizational structures to ensure consistent implementation over time.



## Getting Started Rubric

This rubric presents a continuum of activities across three stages of the development and implementation of Success Plans: *Establishing*, *Developing*, and *Mature*. The stages are cumulative and intended to build upon each other. Use this continuum to identify which stage applies to your community and relevant actions to undertake, in addition to setting goals for advancing to the next phase of work. Communities may enter the work at different stages depending on any efforts already underway.

	ESTABLISHING (Year 1)	DEVELOPING (Year 2)	MATURE (Year 3 And Beyond)
EQUITY AND ACCESS	<ul style="list-style-type: none"> <li>Plans identify students' strengths, interests, and goals, in addition to their needs and challenges.</li> <li>Plans identify appropriate supports that reflect each student's level of need.</li> <li>Plans include a mechanism for referring students to those supports.</li> <li>Plans promote equitable opportunities for all, inclusive of race/ethnicity, language, socioeconomic status, gender, gender identity, disability, or immigration status.</li> <li>Assessment instruments and/or tools are identified that are culturally sensitive.</li> </ul>	<ul style="list-style-type: none"> <li>Students are referred to supports, services, and opportunities tailored to their strengths, interests, and needs.</li> <li>Appropriate and culturally sensitive assessment instruments and/or tools are deployed.</li> </ul>	<ul style="list-style-type: none"> <li>All students are referred to supports, services, and opportunities tailored to their strengths, interests, and needs.</li> <li>Assessment instruments and/or tools are regularly reviewed based on current research and modified as needed.</li> <li>Outcomes are regularly reviewed using disaggregated data to monitor impact of plans on subgroups.</li> </ul>
STUDENT POPULATION	<ul style="list-style-type: none"> <li>Plans are developed at a particular program site or school.</li> </ul>	<ul style="list-style-type: none"> <li>Plans are rolled out to a larger subset of students.</li> </ul> <p><b>OR</b></p> <ul style="list-style-type: none"> <li>Plans are available for the whole student body in a particular zone, area, or school.</li> </ul>	<ul style="list-style-type: none"> <li>Plans are implemented for all students in the community.</li> </ul>
METRICS AND ASSESSMENT	<ul style="list-style-type: none"> <li>Student-level indicators across multiple domains are identified and selected.</li> <li>Instruments and/or tools are identified and selected for assessing multiple student outcomes.</li> <li>An initial data collection protocol is developed to gather student-level indicators across multiple domains.</li> </ul>	<ul style="list-style-type: none"> <li>Instruments and/or tools are administered to assess multiple student outcomes.</li> <li>Staff track both access to supports and student outcomes.</li> <li>An evaluation strategy is identified to disaggregate data and assess impact on access to supports and student outcomes.</li> </ul>	<ul style="list-style-type: none"> <li>Comprehensive data about student needs is collected.</li> <li>Staff routinely communicate information related to access to supports and student outcomes across partners.</li> <li>Staff track conversion rates of referrals to provision of services and intervene to provide support when referrals don't materialize into services and opportunities.</li> <li>An evaluation strategy is implemented to disaggregate data and assess impact on access to supports and student outcomes.</li> </ul>

	<b>ESTABLISHING (Year 1)</b>	<b>DEVELOPING (Year 2)</b>	<b>MATURE (Year 3 And Beyond)</b>
<b>PARTNERSHIPS</b>	<ul style="list-style-type: none"> <li>• A process is established to identify the departments and/or agencies that provide relevant services.</li> <li>• New partnerships are identified to facilitate service delivery.</li> <li>• A mechanism is identified to convene service providers to review plans.</li> </ul>	<ul style="list-style-type: none"> <li>• A mechanism is implemented to convene service providers to review plans.</li> <li>• Additional partnerships are created as needed.</li> </ul>	<ul style="list-style-type: none"> <li>• Memoranda of Understanding (MOUs) are executed with evidence-based programs that are responsive and committed to the process.</li> <li>• Quality indicators are required for partners.</li> </ul>
<b>DATA SHARING</b>	<ul style="list-style-type: none"> <li>• A systematic process for sharing student data across partners is identified.</li> <li>• The aim of sharing student data is clearly communicated to families and any concerns about privacy are addressed.</li> <li>• Best practices for ensuring data security are employed.</li> </ul>	<ul style="list-style-type: none"> <li>• Key stakeholders develop MOUs or other legal agreements to collect, manage, and analyze data as well as to protect privacy and confidentiality.</li> </ul>	<ul style="list-style-type: none"> <li>• Data is seamlessly shared across partners, while protecting confidentiality and adhering to high data security standards.</li> </ul>
<b>STUDENT VOICE AND FAMILY ENGAGEMENT</b>	<ul style="list-style-type: none"> <li>• Strategies are identified to empower students to drive the development of their plans.</li> <li>• Approaches to meaningfully involve families are identified.</li> <li>• Strategies to monitor the depth and impact of engagement are identified.</li> </ul>	<ul style="list-style-type: none"> <li>• Strategies are implemented to empower students to drive the development of their plans.</li> <li>• Strategies to meaningfully involve families are implemented.</li> <li>• Strategies to monitor the depth and impact of engagement are implemented.</li> </ul>	<ul style="list-style-type: none"> <li>• Youth proactively drive the development of their plans by identifying their strengths, interests, and needs, setting goals, and pursuing opportunities aligned with their future aspirations.</li> <li>• Families contribute to the development of their children's plans and provide ongoing feedback.</li> <li>• Strategies to monitor the depth and impact of engagement are regularly reviewed and modified as needed.</li> </ul>
<b>GOVERNANCE AND MANAGEMENT</b>	<ul style="list-style-type: none"> <li>• The entity(s) responsible for overseeing the plans is identified.</li> <li>• Staffing needs for creating and maintaining the plans are identified.</li> <li>• Roles, responsibilities, and relationships among all stakeholders involved in developing and implementing the plans are clearly defined.</li> </ul>	<ul style="list-style-type: none"> <li>• The entity(s) responsible for overseeing the plans begins implementation.</li> <li>• A process is underway to secure staffing to create and maintain plans.</li> </ul>	<ul style="list-style-type: none"> <li>• Adequate staffing is allocated to create and maintain the plans.</li> <li>• Staff are trained in all aspects of plan development and implementation, including the appropriate data to include and how to handle sensitive information.</li> </ul>

	ESTABLISHING (Year 1)	DEVELOPING (Year 2)	MATURE (Year 3 And Beyond)
DATA PLATFORMS	<ul style="list-style-type: none"> <li>• A decision is made about where to house the platform (e.g., school district, community-based organization, or public agency).</li> <li>• Existing platforms are vetted to determine their ability to facilitate data sharing across partners, while protecting student privacy and adhering to high data security standards.</li> <li>• Alternative platforms are explored and evaluated based on their cost, accessibility, compatibility across systems, data security standards, the metrics they capture, and customizability.</li> </ul>	<ul style="list-style-type: none"> <li>• An existing platform is selected and adapted as needed to facilitate data sharing across partners, while protecting student privacy and adhering to high data security standards.</li> </ul> <p><b>OR</b></p> <ul style="list-style-type: none"> <li>• A new platform is selected and used to facilitate data sharing across partners, while protecting student privacy and adhering to high data security standards.</li> </ul>	<ul style="list-style-type: none"> <li>• The platform documents each young person’s strengths, interests, and needs over time, tracks referrals and service delivery, and produces a dashboard displaying real-time student progress and outcomes.</li> </ul>
FINANCIAL SUPPORT	<ul style="list-style-type: none"> <li>• Funding from existing resources is maximized to the extent possible.</li> </ul>	<ul style="list-style-type: none"> <li>• Some new public and private resources have been secured.</li> </ul>	<ul style="list-style-type: none"> <li>• A sustainable, ongoing plan for funding is identified and in place.</li> </ul>



## Getting Started Worksheet

**Directions:** After using the Getting Started Rubric to identify the stage of your Success Plans implementation and corresponding actions to pursue, in addition to setting goals to progress to the next phase, complete this companion worksheet. This worksheet is designed to help you take stock of the components your community already has in place to support Success Plans (column 2) and the items that you will need to address (column 3). Next, determine each component's level of priority by rating its level of importance based on your stage of work (column 4).

EQUITY AND ACCESS	WHAT DO WE CURRENTLY HAVE?	WHAT DO WE NEED?	RATE According to Level of Priority Based on Phase of Work 1 (immediate need) – 5 (eventual need)
Plans identify students' strengths, interests, and goals, in addition to their needs and challenges			
Plans identify appropriate supports depending on level and type of need			
Plans include a mechanism for referring students to those supports			
Plans promote equitable opportunities for all (inclusive of race/ethnicity, language, socioeconomic status, gender, gender identity, disability, or immigration status)			

STUDENT POPULATION	WHAT DO WE CURRENTLY HAVE?	WHAT DO WE NEED?	<b>RATE</b> According to Level of Priority Based on Phase of Work 1 (immediate need) – 5 (eventual need)
Assessment instruments are culturally sensitive and appropriate			
Student population subset is agreed upon (i.e., a particular grade level)			
The community, school(s), or district is/ are identified			
Participating stakeholders are engaged and committed (e.g., out-of-school time providers, school district, health partners)			

<b>METRICS AND ASSESSMENT</b> <i>(see Metrics Table for potential academic and non-academic indicators)</i>	<b>WHAT DO WE CURRENTLY HAVE?</b>	<b>WHAT DO WE NEED?</b>	<b>RATE</b> According to Level of Priority Based on Phase of Work 1 (immediate need) – 5 (eventual need)
Student-level indicators across multiple domains are identified and selected			
Instruments and/or tools are identified and selected for assessing multiple student outcomes			
Student-level indicators across multiple domains are collected			
An evaluation strategy is identified to disaggregate data and assess impact on access to supports and student outcomes			



PARTNERSHIPS	WHAT DO WE CURRENTLY HAVE?	WHAT DO WE NEED?	<b>RATE</b> According to Level of Priority Based on Phase of Work 1 (immediate need) – 5 (eventual need)
<p>Existing partnerships with community-based organizations and/or public agencies are leveraged to address the identified target metrics</p>			
<p>New partnerships with community-based organizations and/or public agencies are created to address the identified target metrics</p>			
<p>A mechanism is identified and/or implemented to convene service providers to review plans</p>			

DATA SHARING	WHAT DO WE CURRENTLY HAVE?	WHAT DO WE NEED?	<b>RATE</b> According to Level of Priority Based on Phase of Work 1 (immediate need) – 5 (eventual need)
Families understand the aim of sharing student data and any concerns about privacy are addressed			
Memoranda of Understanding (MOUs) are executed among partners			
Other data-sharing agreements exist or are being created (enter in field below): _____ _____			
Best practices for ensuring data is secure are employed			

STUDENT VOICE AND FAMILY ENGAGEMENT	WHAT DO WE CURRENTLY HAVE?	WHAT DO WE NEED?	<b>RATE</b> According to Level of Priority Based on Phase of Work 1 (immediate need) – 5 (eventual need)
Students identify their strengths, interests, goals, and needs			
Youth regularly review their plans and modify them as needed			
Families provide ongoing feedback and guidance			
Strategies to monitor the depth and impact of engagement are identified and/or implemented			

GOVERNANCE AND MANAGEMENT	WHAT DO WE CURRENTLY HAVE?	WHAT DO WE NEED?	<b>RATE</b> According to Level of Priority Based on Phase of Work 1 (immediate need) – 5 (eventual need)
The entity(s) responsible for overseeing the Success Plans is identified			
Roles, responsibilities, and relationships among all stakeholders are clearly defined			
Adequate staffing is allocated to creating and maintaining plans			
All staff responsible for creating and maintaining plans are provided appropriate training			

DATA PLATFORMS	WHAT DO WE CURRENTLY HAVE?	WHAT DO WE NEED?	<b>RATE</b> According to Level of Priority Based on Phase of Work 1 (immediate need) – 5 (eventual need)
<p>A decision is made about where to house the platform (e.g., school district, community-based organization, or public agency)</p>			
<p>Existing platforms are vetted based on their accessibility, compatibility across systems, data security standards, the metrics they capture, and customizability</p>			
<p>Alternative platforms are identified and vetted based on their cost, accessibility, compatibility across systems, data security standards, the metrics they capture, and customizability</p>			

FINANCIAL SUPPORT	WHAT DO WE CURRENTLY HAVE?	WHAT DO WE NEED?	<b>RATE</b> According to Level of Priority Based on Phase of Work 1 (immediate need) – 5 (eventual need)
Existing resources are maximized to the extent possible			
Policies such as ESSA are reviewed to identify potential resources to support Success Plans such as those designated for personalized learning and/or integrated student supports			
Ongoing, sustainable public and/or private resources are identified and/or secured			



## Academic and Non-Academic Metrics Table

This table contains potential academic and non-academic indicators for communities to track in their Success Plans and identifies corresponding data sources. Select the indicators that are most useful for your local community. Child- and student body-level rows are correlated with each other, while community-level measurement information is independent. Please note that these categories of measurements and indicators are non-exhaustive.

HEALTH AND NUTRITION ACCESS					
CHILD-LEVEL DATA (Identifiable)	DATA SOURCE	STUDENT BODY-LEVEL MEASUREMENT (Aggregated/De-Identified)	DATA SOURCE	COMMUNITY-LEVEL MEASUREMENT	DATA SOURCE
Track individual students who receive breakfast	Teacher	<b>Students receiving school breakfast:</b> Number of breakfast meals served to students	State Department of Education	<b>Food desert designation:</b> Percentage of population living more than ½ mile from the nearest supermarket, supercenter, or large grocery store	U.S. Department of Agriculture; state/local Department of Health
Track individual students who receive summer meals	Summer food provider	<b>Access to meals during summer break:</b> Number of meals served during summer school vacations	<a href="#">Federal Summer Food Service Program - Summer Nutrition Programs</a>	<b>Access to healthy foods:</b> Proportion of full-service supermarkets that sell produce who accept SNAP benefits	U.S. Department of Agriculture; state/local Department of Health
Track individual students who receive weekend meals	Volunteer; person distributing meals	<b>Access to meals during weekends:</b> Number of students receiving weekend meal backpacks	Depends on who is funding (i.e. local groups)	<b>Participation in federal school breakfast programs:</b> Number of eligible schools participating in 1. Community Eligibility Program, 2. Breakfast After the Bell	<a href="#">Food and Research Action Center - School Breakfast Program</a>
Track individual students who receive spring/winter break meals	Volunteer; person distributing meals	<b>Access to meals during spring/winter breaks:</b> Number of students/meals served during spring and winter breaks	Depends on who is funding (i.e. local groups)	<b>Participation in Child and Adult Care Food Programs (CACFP):</b> Number of community organizations participating in CACFP	<a href="#">Food and Research Action Center - CACFP</a>
Track individual students who receive afterschool meals	Volunteer; person distributing meals	<b>Access to meals after school:</b> Number of students receiving meals/snacks after school	<a href="#">Food and Research Action Center - Afterschool Nutrition Programs</a>	<b>Food pantries/food kitchens:</b> Number of food pantries/food kitchens/free meal resources in the community	Local agency?

## ACADEMICS

CHILD-LEVEL DATA (Identifiable)	DATA SOURCE	STUDENT BODY-LEVEL MEASUREMENT (Aggregated/De-Identified)	DATA SOURCE	COMMUNITY-LEVEL MEASUREMENT	DATA SOURCE
Track individual students who graduate	School system: academic tracker; teacher	<b>High school graduation rate:</b> Rate of high school graduation at neighborhood schools; disaggregated by race, SES, and disability	State Department of Education	<b>Community education attainment:</b> Proportion of community with high school degree, proportion of community with college degree, proportion of community with graduate degree; disaggregated by race, SES, and disability. Also can be measured as the average number of years of schooling among adults in a community	State Department of Education; State Department of Commerce?
Track individual students who receive or are in a GED course	Community provider; school (depends on who administers the program)	<b>GED attainment rate:</b> Rate of students who attain a GED	State Department of Education	<b>Parental education attainment:</b> Proportion of parents who have not graduated high school; proportion of parents that have graduated high school or obtained a GED; proportion of parents that have graduated college; proportion of parents with a graduate degree	State Department of Education; other community-wide data source
Track individual students who are slated to graduate (or not graduate) on time	School system: academic tracker; teacher	<b>On-time graduation rate:</b> Rate of students that complete high school in four years	State Department of Education	<b>Parental language levels:</b> Rate of reading and writing competency of parents	State Department of Education; other community-wide data source
Track individual students who meet (or do not meet) 3rd grade reading levels	School system: academic tracker; teacher	<b>Rate of students who meet 3rd grade reading levels</b>	State Department of Education	<b>Child care enrollment:</b> Rate of participation in child care services; proportion of child care slots that are used vs. open or used vs. waiting list	State Department of Social Services
Track individual students' standardized test scores	School system: academic tracker; teacher	<b>Standardized test scores</b>	State Department of Education	<b>Number of postsecondary institutions per capita or within the town's radius</b>	State Department of Education
Track individual students' GPAs	School system: academic tracker; teacher	<b>Grade and school level average GPA</b>	State Department of Education		



## ACADEMICS

CHILD-LEVEL DATA (Identifiable)	DATA SOURCE	STUDENT BODY-LEVEL MEASUREMENT (Aggregated/De-Identified)	DATA SOURCE	COMMUNITY-LEVEL MEASUREMENT	DATA SOURCE
Track individual students' application to postsecondary education	Guidance counselor	<b>Rate of acceptance into postsecondary education</b>	School district		
Track individual students who are/have been held back from advancing grade levels	Teacher; principal	<b>Track total number of students who have been held back across the district, disaggregated by grade</b>	School district		
Track individual students who meet (or do not meet) their math benchmark levels	Teacher; principal	<b>Math levels/benchmarks:</b> Rate of students that meet their benchmark math level	State Department of Education		
Track individual students who meet (or do not meet) their science benchmark levels	Teacher; principal	<b>Science levels/benchmarks:</b> Rate of students that meet their benchmark science level	State Department of Education		
Track individual students who meet (or do not meet) their reading and writing benchmark levels	Teacher; principal	<b>Language levels/benchmarks:</b> Rate of students that meet their reading and writing benchmark levels	State Department of Education		

## HOUSING AND TRANSPORTATION

CHILD-LEVEL DATA (Identifiable)	DATA SOURCE	STUDENT BODY-LEVEL MEASUREMENT (Aggregated/De-Identified)	DATA SOURCE	COMMUNITY-LEVEL MEASUREMENT	DATA SOURCE
Track individual students who identify as homeless	McKinney Vento List; school counselor; any partner provider; U.S. Department of Housing and Urban Development	<b>Student homelessness definition (U.S. Department of Education):</b> Number of students reported to the U.S. Department of Education as homeless ( <i>point in time counts</i> )	District homeless liaison	<b>Excessive housing cost burden:</b> Proportion of neighborhood households whose gross housing costs are 35% or more of their income	U.S. Census Bureau; state/local Department of Housing; U.S. Bureau of Labor Statistics
		<b>Homelessness definition (U.S. Department of Housing and Urban Development):</b> Number of families or unaccompanied minors reported to be homeless in a city	<a href="#">Here is an article that describes the differences in the U.S. Department of Education and U.S. Department of Housing and Urban Development definitions</a>	<b>Age of housing:</b> Proportion of homes constructed prior to 1978 (when lead paint was still used)	
Track individual students who take the bus to school	Bus driver	<b>Student use of McKinney Vento transportation:</b> Number of students utilizing McKinney Vento services	District homeless liaison	<b>Overall homelessness:</b> Number of homeless individuals in a community  <b>Rental vs. Owner Occupied:</b> Percent of occupied housing units that are owner occupied	State/local Department of Housing; U.S. Census Bureau
Track individual students who take public transportation to school	Teacher; student survey	<b>School bus participation:</b> Rate of children who use the bus as their primary mode of getting to school	State Department of Education	<b>Waitlist for public housing:</b> Number of families on the waitlist for public housing; average length of time for public housing waitlist	U.S. Census Bureau; state/local Department of Housing; state/local Department of Transportation; surveys to families
				<b>Transportation capacity:</b> Families' ability to access transportation; rate of public transportation use; rate of personal transportation use; barriers to transportation	

## HOUSING AND TRANSPORTATION

CHILD-LEVEL DATA (Identifiable)	DATA SOURCE	STUDENT BODY-LEVEL MEASUREMENT (Aggregated/De-Identified)	DATA SOURCE	COMMUNITY-LEVEL MEASUREMENT	DATA SOURCE
Track individual students who join school mid-year	Principal; whoever is responsible for enrollment	<b>Student mobility rate:</b> Unduplicated count of grade K-12 students who moved into or out of the district in Year X DIVIDED BY Total # students that were part of same membership base	State Department of Education	<b>Low-income housing:</b> Units of low-income housing available	State/local Department of Housing; U.S. Census Bureau
		<b>Student Mobility Incidence Rate:</b> Duplicated count of grade K-12 students who moved into or out of the district in Year X DIVIDED BY total # of students that were part of same membership base		<b>Scarcity:</b> Percent of vacant housing units	

## SENSE OF BELONGING

CHILD-LEVEL DATA (Identifiable)	DATA SOURCE	STUDENT BODY-LEVEL MEASUREMENT (Aggregated/De-Identified)	DATA SOURCE	COMMUNITY-LEVEL MEASUREMENT	DATA SOURCE
If the survey can be completed with identifiable information, analyze data at individual child-level	School; teacher	<b>U.S. Department of Education school climate scale:</b> <a href="#">Suite of school climate surveys for middle and high school students, instructional staff, non-instructional staff, and parents/guardians.</a> <a href="#">Free of charge to download.</a>	State Department of Education - if they measure this? Or perform own survey	<b>Sense of Community Index:</b> The theory identifies four elements of a sense of community: membership, influence, meeting needs, and a shared emotional connection	<a href="#">The Index is available free of charge</a> , but would have to perform own data collection.
If the survey can be completed with identifiable information, analyze data at individual child level	School; teacher	<b>School climate:</b> <a href="#">The National Center on Safe Supportive Learning Environments (NCSSLE) maintains a compendium of valid and reliable surveys, assessments, and scales of school climate that can assist educators in their efforts to identify and assess their conditions for learning.</a>	State Department of Education - if they measure this? Or perform own survey	<b>Parental involvement/attitude toward school:</b> Percent of households with children aged 0-13 years reporting unsatisfactory public schools in their neighborhood	<a href="#">American Housing Survey</a>

## SENSE OF BELONGING

CHILD-LEVEL DATA (Identifiable)	DATA SOURCE	STUDENT BODY-LEVEL MEASUREMENT (Aggregated/De-Identified)	DATA SOURCE	COMMUNITY-LEVEL MEASUREMENT	DATA SOURCE
Analyze data at the individual child level	School; teacher	<b>Psychological Sense of School Membership Questionnaire:</b> 18 self-reported questions about students' feelings toward school, including: acceptance and inclusion, respect and encouragement, and peers' reaction toward opinions	State Department of Education - if they measure this? Or perform own survey	<b>Efficacy to Influence School-Related Performance Subscale from the Parental Self-Efficacy Scale:</b> Survey of the factors that make it difficult for parents to influence their children's school activities	Would have to perform own survey; survey found in Strive Vol. III (Bandura, 2001)
Analyze data at the individual child level	School; teacher	<b>Social support appraisals scale for children:</b> Evaluates perceived friend, classroom, teacher, and family support separately	State Department of Education - if they measure this? Or perform own survey		
Analyze data at the individual child level	School; teacher	<b>Belonging scale</b>	Gambone & Arbreton (1997); would have to perform own survey; can adapt the original scale to measure belonging in various programs/ settings (see Strive III for example)		
Analyze data at the individual child level	School; teacher	<b>Personal and Academic Student Self-Concept Inventory (PASC):</b> Survey about sense of belonging in school	Would have to perform own survey; survey found in Strive Vol. III (Fleming)		
Analyze data at the individual child level	School; teacher	<b>Children's perceived academic self-efficacy subscale from The Morgan-Jinks Student Efficacy Scale (MJSES)</b>	Would have to perform own survey; survey found in Strive Vol. III		

## EMOTIONAL AND MENTAL HEALTH

CHILD-LEVEL DATA (Identifiable)	DATA SOURCE	STUDENT BODY-LEVEL MEASUREMENT (Aggregated/De-Identified)	DATA SOURCE	COMMUNITY-LEVEL MEASUREMENT	DATA SOURCE
Track individual students who are suspended or expelled	Principal	<b>Rate of suspensions and expulsions:</b> Disaggregated by race, socioeconomic status, and disability	State Department of Education	<b>Number of intakes to:</b> Mental health hospitals/behavioral health hospitals/psychiatric hospitals	State Department of Behavioral Health
Track individual students who are arrested, charged, incarcerated, and/or on probation	State Department of Juvenile Justice	<b>Rate of intake at juvenile centers or number of juvenile court cases</b>	State Department of Juvenile Justice	<b>Accessibility of mental health providers:</b> Total number of physicians in psychiatric, office-based patient care; number of hospitals with psychiatric emergency, outpatient, emergency social work, and outpatient social work services	State Department of Health; State Department of Behavioral Health
Track individual students who are seeing a mental health provider	School counselors; social worker	<b>Mental health outpatient visits:</b> Number of outpatient visits to mental health hospitals, behavioral health hospitals, or psychiatric hospitals among students	State Department of Health; State Department of Behavioral Health	<b>Accessibility of mental health providers (Medicaid):</b> Total number of physicians in psychiatric, office-based patient care; number of hospitals with psychiatric emergency, outpatient, emergency social work, and outpatient social work services who accept Medicaid	State Department of Health; State Department of Behavioral Health
Track individual students who have been hospitalized for suicide attempt or ideation	Primary care physician; parent	<b>Suicide rate/suicide attempt rate among minors:</b> May be measured by number of emergency department visits among minors due to suicide attempt	State Department of Health	<b>Suicide rate/attempted suicide rate:</b> Measured by number of visits to the emergency department due to suicide attempt	State Department of Health; State Department of Vital Statistics
Track individual students who are referred to and visit a school counselor, psychiatrist, and/or social worker	School counselors; social worker	<b>School counselor/psychiatrist utilization:</b> Rate of teacher/staff referrals that become visits to school counselors/school psychiatrists. Try to get unduplicated numbers if possible	Local school district	<ol style="list-style-type: none"> <li>1. Ratio of school counselors/ students</li> <li>2. Ratio of school psychologists/ students</li> <li>3. Ratio of school social workers/ students</li> <li>4. Ratio of school psychiatrists/ students</li> </ol>	State Department of Education

## EMOTIONAL AND MENTAL HEALTH

CHILD-LEVEL DATA (Identifiable)	DATA SOURCE	STUDENT BODY-LEVEL MEASUREMENT (Aggregated/De-Identified)	DATA SOURCE	COMMUNITY-LEVEL MEASUREMENT	DATA SOURCE
Track individual students who have been referred to mental health providers in community	School counselors; psychologists	<b>Mental health provider referrals and utilization:</b> Rate of referrals from school counselors/psychologists that become referrals to mental health providers	State Department of Education	<b>Accessibility of mental health providers:</b> Total number of physicians in psychiatric, office-based patient care; number of hospitals with psychiatric emergency, outpatient, emergency social work, and outpatient social work services for youth	State Department of Health; State Department of Behavioral Health
		<b>The Centers for Disease Control and Prevention's Youth Risk Behavior Surveillance System (YRBSS):</b> The YRBSS includes national, state, territorial, tribal government, and local school-based surveys of representative samples of 9-12th grade students. The YRBSS was developed in 1990 to monitor health behaviors that contribute markedly to the leading causes of death, disability, and social problems among youth and adults in the United States.	The Centers for Disease Control and Prevention	<b>Accessibility of mental health providers (Medicaid):</b> Total number of physicians in psychiatric, office-based patient care; number of hospitals with psychiatric emergency, outpatient, emergency social work, and outpatient social work services for youth who accept Medicaid	State Department of Health; State Department of Behavioral Health
Analyze persistence scale data at individual child level	School; teacher	<b>Persistence scale for children:</b> "Persistence" is a measure of resilience and coping	Would perform own survey; DESSA found in Strive III		
Analyze grit scale data at individual child level	School; teacher	<b>Grit scale:</b> "Grit" is a measure of resilience and coping	Would perform own survey; found in Strive III and <a href="#">here</a>		
Analyze resilience scale data at individual child level	School; teacher	<b>Resilience scale</b>	Would perform own survey; found in Strive III		

## PHYSICAL HEALTH

CHILD-LEVEL DATA (Identifiable)	DATA SOURCE	STUDENT BODY-LEVEL MEASUREMENT (Aggregated/De-Identified)	DATA SOURCE	COMMUNITY-LEVEL MEASUREMENT	DATA SOURCE
Track individual students' immunization records	School nurse; primary care physician	<b>Immunization rate:</b> Percent of children completely immunized by race/ethnicity	State Department of Health; National Immunization Program	<b>Life expectancy:</b> Count of years of potential life lost per capita	State Department of Health
Track individual students who receive an annual physical exam	School nurse; primary care physician	<b>Annual physical exams:</b> Rate of children that have a medical provider and go to all scheduled well-child and physical examinations	State Department of Health; local providers	<b>Preventable hospitalizations:</b> Age-standardized hospitalization rate for conditions where appropriate outpatient care could have prevented or reduced need for hospital admission	State Department of Health
Track individual students who submit a doctor's note for medically-related absences	Parent; physician	<b>Medically-related absences:</b> Proportion of absences that are due to medical reasons	State Department of Education	<b>Health insurance coverage:</b> Number of non-insured residents	State Department of Health
Track individual students who are hospitalized for asthma	Parent; physician	<b>Asthma Child Hospitalization Rate:</b> Rate of hospitalizations/emergency department visits due to asthma	State Department of Health	<b>Asthma hospitalization rate:</b> Rate of hospitalizations for adults in emergency departments due to asthma	State Department of Health
Track individual students body mass index (BMI)	School nurse; primary care physician	<b>Obesity:</b> Proportion of children diagnosed as obese by their pediatrician	State Department of Health	<b>Obesity:</b> Proportion of adults diagnosed as obese by their physician	State Department of Health
Track individual students' health insurance coverage	School nurse; primary care physician; parent	<b>Health insurance coverage:</b> Number of children enrolled in various types of health insurance	State Medicaid Office; State Department of Health		
Track individual students' dental visits	Dentist; parent	<b>Oral health:</b> Children, age 2-20 years, who received a limited, periodic, comprehensive, or problem-focused oral evaluation or an oral assessment in the year prior to the measurement year	State Department of Health; insurance claims data		

## PHYSICAL HEALTH

CHILD-LEVEL DATA (Identifiable)	DATA SOURCE	STUDENT BODY-LEVEL MEASUREMENT (Aggregated/De-Identified)	DATA SOURCE	COMMUNITY-LEVEL MEASUREMENT	DATA SOURCE
Track individual students diagnosed with lead exposure	Parent; physician	<b>Lead Exposure:</b> Proportion of children who have detectable Blood Lead Levels (BLL)	State Department of Health		
Track individual students with medical home	Parent; physician	<b>Proportion of children enrolled in a medical home</b>	State Department of Health; insurance claims data		
		<b>The Center for Disease Control and Prevention's Youth Risk Behavior Surveillance System (YRBSS):</b> The YRBSS includes national, state, territorial, tribal government, and local school-based surveys of representative samples of 9-12th grade students. The YRBSS was developed in 1990 to monitor health behaviors that contribute markedly to the leading causes of death, disability, and social problems among youth and adults in the United States.			

## CIVIC ENGAGEMENT

CHILD-LEVEL DATA (Identifiable)	DATA SOURCE	STUDENT BODY-LEVEL MEASUREMENT (Aggregated/De-Identified)	DATA SOURCE	COMMUNITY-LEVEL MEASUREMENT	DATA SOURCE
Track individual students who complete community service hours	School counselor	<b>Participation in community service:</b> Proportion of students who participate in community service activities	State Department of Education	<b>Voter Participation:</b> Proportion of voting eligible population who voted in last election	Local Election Board
Track individual students' daily attendance at extracurricular activities	Club staff; teacher; coach	<b>Participation in school clubs/extracurricular activities:</b> Proportion of students who participate in extracurricular activities	State Department of Education	<b>Registered voters:</b> Proportion of citizens who are registered to vote	Local Election Board



## CIVIC ENGAGEMENT

CHILD-LEVEL DATA (Identifiable)	DATA SOURCE	STUDENT BODY-LEVEL MEASUREMENT (Aggregated/De-Identified)	DATA SOURCE	COMMUNITY-LEVEL MEASUREMENT	DATA SOURCE
Track individual students who have part-time after school employment	Student; parent; counselor	<b>Student employment:</b> Number of students who have part-time after school employment	State Department of Education	<b>Job Participation Indicator:</b> The percentage of individuals 18-64 years of age active in the civilian labor force. It includes both those currently working and those seeking work.	State Department of Labor
Track individual students who participate in student government	Teachers	<b>Student government associations:</b> Proportion of schools with student government associations	State Department of Education	<b>Ease of Registration:</b> Voter registration by mail allowed; registration deadline prior to election	Local Election Board
Track individual students who are registered to vote	Student; parent	<b>Registered voters:</b> Proportion of students 18 years old+ who are registered to vote	Local Election Board	<b>Census Response Rates</b>	U.S. Census
Track individual students' participation in service learning projects	Teacher	<b>Service Learning:</b> Number of schools that offer service-learning opportunities as part of their curriculum	State Department of Education; local school district	<b>Donations to parties/candidates:</b> Donations to Republican and Democratic candidates, parties, and political action committees	<a href="#">Center for Responsive Politics</a> . Contributions for selected metropolitan areas, zip codes, and states
Track individual students enrolled in the military	Student; counselor	<b>Military enrollment:</b> Number of students enrolling in military after graduation	State Department of Education; local school district	<b>Church participation:</b> Number of churches (by denomination); number of church members and church adherents	Local agency?; <a href="#">2010 U.S. Religion Census: Religious Congregations &amp; Membership Study</a>
Track individual students who participate in ROTC	Student; ROTC leader	<b>ROTC participation:</b> Number of students participating in ROTC	State Department of Education; local school district	<b>Parental Employment:</b> Rates of parents with part-time, full-time, or no employment	State Department of Labor; State Department of Commerce
Track individual students who participate in summer enrichment opportunities	Teacher; summer volunteer				

## CULTURAL AND LINGUISTIC DIVERSITY

CHILD-LEVEL DATA (Identifiable)	DATA SOURCE	STUDENT BODY-LEVEL MEASUREMENT (Aggregated/De-Identified)	DATA SOURCE	COMMUNITY-LEVEL MEASUREMENT	DATA SOURCE
Track individual students' linguistic capabilities	Teacher	<b>Dual language students:</b> Number of students who are bilingual or multilingual; number of students that are English Language Learners	State Department of Education	<b>Racial and ethnic diversity:</b> Measure of the extent to which several racial/ethnic groups are present in the community	U.S. Census Bureau
Track individual students who participate in diversity/ethnic clubs	Teacher	<b>Diversity/ethnic clubs:</b> Number of schools that have diversity/ethnic clubs or extracurricular activities	State Department of Education	<b>Neighborhood racial/ethnic segregation:</b> Distribution of the population by race/ethnic group within a census tract relative to the distribution across the city (index)	U.S. Census Bureau
Track individual students who are immigrants or dual citizens	Parent	<b>Immigrant students/dual citizenship students:</b> Proportion of students who have immigrated to the area; number of students with dual citizenship	State Department of Education	<b>Hate crimes:</b> Rate of incidents that are considered hate crimes in a community; can also be compared across years to measure an increase or reduction in hate crimes	Police department
Track individual students' self-identified race/ethnicity	Student	<b>Diversity in classrooms:</b> The average proportion of racial/ethnic diversity in the classroom	State Department of Education	<b>Chambers of Commerce:</b> Number of ethnic/minority Chambers of Commerce	State Department of Labor
Track individual students' self-identified race/ethnicity	Student	<b>Enrollment by race and ethnicity</b>	State Department of Education	<b>Immigration:</b> Rate of new immigrants, refugees, and/or asylees settling into a community	U.S. Census Bureau
Track individual students who are enrolled in or have completed a foreign language class	Principal; teacher	<b>Foreign language accessibility:</b> Number of foreign languages taught in school	State Department of Education; local school district	<b>Equity Policies:</b> Number of local policies with an equity lens	<a href="#">National Equity project</a>

## CULTURAL AND LINGUISTIC DIVERSITY

CHILD-LEVEL DATA (Identifiable)	DATA SOURCE	STUDENT BODY-LEVEL MEASUREMENT (Aggregated/De-Identified)	DATA SOURCE	COMMUNITY-LEVEL MEASUREMENT	DATA SOURCE
Track individual students who are enrolled in or have completed a cultural competency requirement	Principal; teacher	<b>Cultural competency graduation requirement:</b> Number of high schools with graduation requirements that include courses in foreign language, cultural competency, or global exposure	State Department of Education; local school district		
Track individual students who have completed a cultural competency requirement	Principal; teacher	<b>Cultural competency training:</b> Number of school-wide trainings on cultural competency; number of schools that offer cultural competency trainings	State Department of Education; local school district		
Track individual students who participate in culturally mindful afterschool programs	Principal; teacher	<b>Culturally mindful afterschool programs:</b> Number of school and afterschool programs that incorporate statements on diversity and cultural competency in their mission, vision, or values statements	State Department of Education; local school district		



## Implementation Work Plan Template

**Directions:** This document will help your community start to plan the initial implementation of your Success Plans initiative. Complete this template to create a work plan to guide your work.

### VISION

In one or two sentences, please describe how this work plan aligns with your community's larger vision and target outcome.

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### SUCCESS PLANS LEADERSHIP TEAM

Please list the members of your community's Success Plans Leadership Team and their projected role(s).

Below are suggested individuals who could serve on the team but feel free to identify members appropriate to your community's context.

*Potential members: school staff (teacher, counselor, principal), health sector staff, social services staff, out-of-school time staff, family representative, student representative, data/research/ information technology staff, Children's Cabinet staff, foundation staff, city government staff (Mayor's office), business community, housing/community development staff, and nonprofit staff.*

TEAM MEMBER'S NAME	TITLE AND ORGANIZATION	ROLE(S) ON LEADERSHIP TEAM

**STAKEHOLDERS**

Please identify the primary stakeholders from which your team will request feedback and support for the initiative. In addition, describe the engagement process for working with these stakeholders.

PRIMARY STAKEHOLDERS	ENGAGEMENT PROCESS FOR WORKING WITH THESE STAKEHOLDERS

## SCOPE OF SUCCESS PLANS INITIATIVE

Please fill out the below parameters to define the scope of your Success Plans Implementation Plan.

<p><b>APPROACH</b></p> <p>The Success Plans long-term plan should include both prevention and intervention components, but we recognize that you may initially test only one part of the system.</p> <ul style="list-style-type: none"><li>• PREVENTION TOOLS monitor a large and diverse student body to align referrals and resources <b>before</b> a major problem occurs and the student is flagged for services.</li><li>• INTERVENTION TOOLS monitor a specific high-needs student population to align <b>already needed</b> resources and referrals.</li></ul>	
<p><b>PROCESS OF SUCCESS PLANS TESTING</b></p> <p>While you may want to test everything at once—from assessment tools to referral processes and data sharing, we encourage you to clarify the explicit purpose of the processes being tested in your initial implementation plan. Below are three processes to test:</p> <ol style="list-style-type: none"><li>1. ASSESSMENT PROCESS Test a process and set of tools to determine students' needs</li><li>2. REFERRAL PROCESS Test the referral and feedback mechanisms between distinct sectors and partners</li><li>3. PREDICTIVE ANALYTICS PROCESS Test a system that uses an algorithm to identify students before a need or issue occurs</li></ol>	

SCOPE OF SUCCESS PLANS INITIATIVE (continued)

<p><b>STUDENT POPULATION</b></p> <p>We aspire for Success Plans to be developed for all students. However, the initial population should be a manageable, targeted subset of students. You can consider a subset as a) all students in select school(s); or b) a target population (e.g. chronically absent students) in a wider number of schools.</p> <ul style="list-style-type: none"><li>• What subset of the student population are you targeting and why?</li><li>• Does the subset align with the goals of your other child- and youth-facing initiatives?</li></ul>	
<p><b>LOCATION</b></p> <p>In what geographic area or schools will the initiative be implemented and why?</p>	
<p><b>METRICS AND ASSESSMENT</b></p> <ul style="list-style-type: none"><li>• Based on your target population and purpose, what data do you need to collect from each student?</li><li>• How will you define your metrics? <i>(See the Academic and Non-academic Metrics Table for potential metrics)</i></li><li>• Do you collect any of this data already?</li><li>• What systems will you seek data from and need to create data-sharing agreements with?</li><li>• How will you know if your Success Plans initiative is successful?</li><li>• How does the Success Plans initiative align with your broader child- and youth-facing goals?</li><li>• What metrics do you expect to improve in your students through this initiative?</li></ul>	

## SCOPE OF SUCCESS PLANS INITIATIVE (continued)

<p><b>PARTNERSHIPS</b></p> <ul style="list-style-type: none"><li>• Based on the metrics you want to collect, what types of partnerships do you need to move the needle (e.g. hospital partners, housing-related nonprofits)?</li><li>• Which partnerships do you already have?</li><li>• How will you develop new partnerships?</li></ul>	
<p><b>DATA SHARING</b></p> <ul style="list-style-type: none"><li>• What types of data-sharing agreements do you need to establish for the initiative?</li><li>• Who will lead this process?</li></ul>	
<p><b>DATA PLATFORM</b></p> <ul style="list-style-type: none"><li>• Which data platform will you use and why?</li><li>• What benefit does the platform provide your Success Plans vision?</li></ul>	
<p><b>FUNDING</b></p> <ul style="list-style-type: none"><li>• How will you fund your Success Plans initiative? Consider creative ways to fund both your Success Plans initial implementation and long-term vision.</li></ul>	
<p><b>GOVERNANCE AND MANAGEMENT</b></p> <ul style="list-style-type: none"><li>• How will the Success Plans Leadership Team liaise with your other child- and youth-facing initiatives?</li><li>• What are strategies to ensure continued feedback to the Success Plans Leadership Team?</li></ul>	



SCOPE OF SUCCESS PLANS INITIATIVE (continued)

<p><b>STUDENT VOICE AND FAMILY ENGAGEMENT</b></p> <ul style="list-style-type: none"><li>• How will you ensure student and family voices are part of your entire initiative and not just the initial design?</li><li>• What strategies will you use?</li><li>• How will you share the purpose and promise of Success Plans with students and families?</li></ul>	
<p><b>EQUITY AND ACCESS</b></p> <ul style="list-style-type: none"><li>• How will you know that your initiative has helped to improve racial equity through its design?</li><li>• What types of strategies are included in the initiative’s design to ensure you are addressing equity issues?</li><li>• How will the initiative ensure that all students are served, inclusive of race/ ethnicity, language, socioeconomic status, gender, gender identity, disability, or immigration status?</li></ul>	

DESCRIBE YOUR VISION OF SUCCESS FOR YOUR INITIAL IMPLEMENTATION EFFORT

by completing the following sentence

By \_\_\_\_\_ [insert date], we will know our initiative was successful because...

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