

Monitor and Adjust Training

October 20 & 22, 2021







Monitoring



Grand Ledge Public Schools

DISCOVER V

IMPLEMENT

REPORT

Hi, Test_LEA_0 V

District MICIP Portfolio: All Active Buildings V

+ Test G	oal 1 with 10 St	trategies, 20 act	ivities each Contains 10 Strategies	a
Test goal s	8	0.4/0.4/202.4		
Created Date:	: 10/04/2021 Target Compl	letion Date: 04/04/2024		
	Monitor	Evaluate		







Monitor

- Involves
 - Implementation
 - Fidelity of implementation implementing the strategy/activity as intended
 - Scale/Reach reaching the intended populations (e.g., number of schools, teachers, grade levels, students, etc.)
 - Capacity supporting those implementing the plan with sufficient human, financial, technology, material and time resources
 - Impact
 - Progress on interim and end targets
- Evidence is critical.
- The responsibility of both the district and school
 - Schools/Programs
 - Goals and strategies/activities assigned to the school reporting to the district continuous improvement team
 - District
 - Collecting data about goals/strategies/activities assigned to schools/programs across the district
 - Goals/strategies/activities assigned only to the district
 - Both
 - Analysis of the data regarding goals/strategies/activities assigned to them

Monitor - Other considerations

- Monitoring must be considered when engaging in the other components of the MICIP process.
- Monitoring informs movement between stages of implementation.
 - From installation to initial implementation
 - From initial implementation to full implementation
 - Back to a previous stage
 - Entire district or school by school
- Monitoring may look different depending on the kind of goal academic, non-academic, systems.
- It is critical that districts and schools monitor the effectiveness of its systems as part of implementation.
- It is also important to monitor the entire continuous improvement process
 - Implementation Fidelity of implementation, scale/reach, capacity
 - Impact
- It is critical to communicate the results of monitoring.
 - What needs to be communicated?
 - To whom does it need to be communicated?
 - When does it need to be communicated?
 - How does it need to be communicated?

Monitor

Live Demo



Monitor: Goal Name

Implementation

		Due Date ⊕	Monitoring Tool	
Owner θ	Start Date 0		Status 0	
Tom Johnson	06/08/2021	06/29/2021	On Target	
Tom Johnson	06/08/2021	06/29/2021	On Target	
	Tom Johnson	Tom Johnson 06/08/2021	Tom Johnson 06/08/2021 06/29/2021	

GLSI (Great Lakes Stewardship Initiative)				Monitoring Tool
Activity ©	Owner ÷	Start Date ©	Due Date ≎	Status ÷
Tom 1.5.2 Test Two	Tom Johnson	06/08/2021	06/29/2021	On Target

Impact

Impact - What progress are we making on the interim and end targets? What is the evidence?

Create Note

Date	Note	Author	
08/24/21	Lorem ipsum dolor sit arnet, consectetur adipiscing elit. Suspendisse	Jane Smith	•
05/20/21	Lorem (psum dolor sit amet, consectetur adipiscing elit	Brian Jones	· ·
03/01/21	Lorem (psum dolor sit amet, consectetur	Janu Smith	9
01/12/21	Lorem ipsum dolor sit amet	Jane Smith	0

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Interim Target Measures

Measures ©	Owner ©	Due Date 🗢	Status =	
Decrease by 3% for upload object		06/17/2021	Constant	D.
Increase by 5% for upload object		06/28/2021	Contracto	E [*]

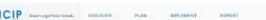
End Target Measures

Measures ⊕	Owner ©	Due Date 🗢	Status ÷	
Tom 1.5.2 Test 2 for Student growth for 4th grade		06/29/2021	Constant	ß
Increase by 77% for upload object		06/29/2021	Complete	27
✓ Decrease by 66% for Student growth for 4th grade		06/29/2021	Complete	ď

Adjust

- Data Story Considerations:
 - What monitoring data will give a more complete picture of your plan?
- Goal Considerations:
 - Do timelines for interim/end targets need to be adjusted forward or backward?
 - What will be the impact of those adjustments?
 - How do adjustments to the plan affect individual schools or target populations?
 - Have you allowed sufficient time for implementation of the plan?
 - Have you allowed time for an implementation dip when implementing a new strategy?
 - Have you provided the supports and resources needed to implement a strategy?
- Strategy/Activity Considerations:
 - Have you allowed time for an implementation dip when implementing a new strategy?
 - Have you provided the supports and resources needed to implement a strategy?
 - Have you completed the activities according to their timelines?
 - Are there barriers to implementation and, if so, have they been addressed?
- General Consideration What impact might the adjustment have on impacted populations, especially unintended negative impacts on certain populations?

Needed Information to adjust plan



-- Monitoring & Adjusting: Transition Mathematics



Implementation with Fidelity - What progress are we making on implementing the selected strategy as intended?
What is the evidence?

Create Note

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Scale / Reach - What progress are we making an reaching the intended populations? What is the evidence?

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Cogacity - What progress are we making an completing the activities by the due date? What is the evidence?

Create Note

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What progress are we making on the interim and end targets? What is the evidence?

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Adjustment

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Based on the adjustments noted above, please select the appropriate step of the improvement Planning Process to make your changes

Adjust Cole Street

Adjust

Adjustment

Based upon the above information, do we need to adjust our goal? Questions for Consideration

Create Note

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05/20/21	Lorem ipsum dolor sit amet, consectetur adipiscing elit	Brian Jones
03/01/21	Lorem ipsum dolor sit amet, consectetur	Jane Smith

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Based on the adjustments noted above, please select the appropriate step of the Improvement Planning Process to make your changes.

Adjust Data Story

Adjust Goal

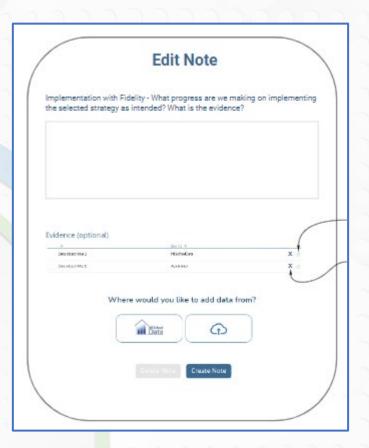
Adjust Strategy/Activity







Adding Evidence when monitoring and adjusting









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→Monitoring & Adjusting: Transition Mathematics



Implementation with Fidelity - What progress are we making on implementing the selected strategy as intended?

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Scale / Reach - What gragress are we making an reaching the intended populations? What is the evidence?

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What progress are we making on the Interim and end targets? What is the evidence?

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Adjustment

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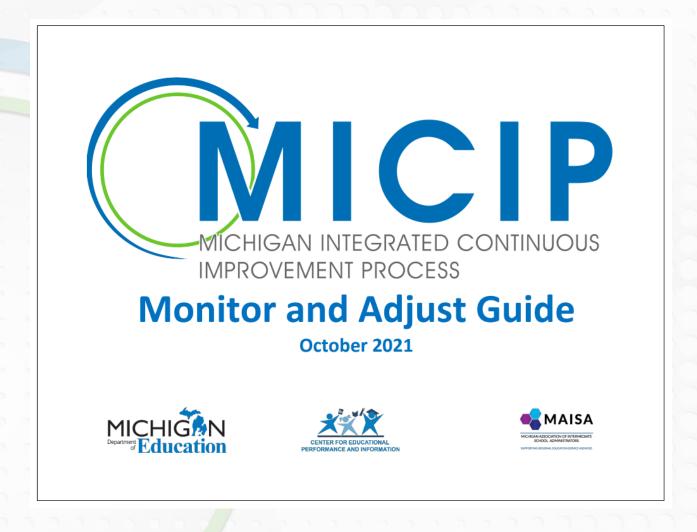
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Seased on the adjustments noted above, please select the appropriate step of the Improvement Planning Process to make your changes



Monitor and Adjust Guide



MICIP Monitor and Adjust Guide (michigan.gov)

Thank you for attending today's session

Ben Boerkoel

MICIP Lead for Professional Learning

Boerkoelb@michigan.gov

Theresa Nugent, PhD

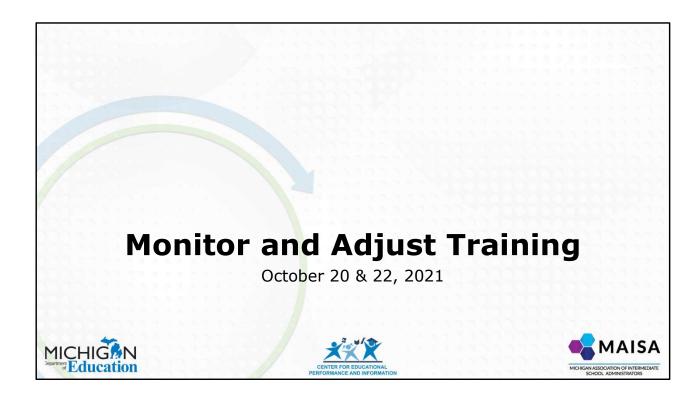
MICIP Lead

Nugentt@michigan.gov





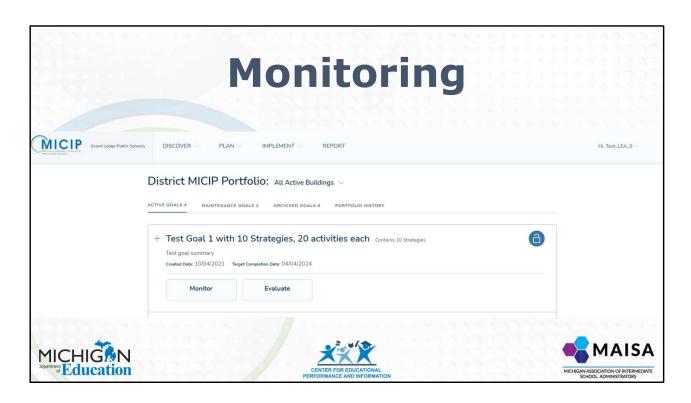




Good morning. Welcome to this training in Monitor and Adjust in the MICIP platform. My name is Ben Boerkoel; I serve as the Manager of the Statewide System of Support and also as the MICIP lead for professional learning. With me today is Terry Nugent, the MICIP lead. A note that we are recording this presentation, and both the recording and the power point will be posted to the MICIP web site.

Before we started building MICIP, we did extensive research about what was working with the previous approach to continuous improvement and what was not. That research indicated that one reason we may not have gotten the results that we wanted is that we did not do a good job of rigorously monitoring our plans, so we're excited that we have made this an integral part of the platform. The Monitor component is now live while we expect the Adjust component to be live by the end of the year. However, today we will be sharing some considerations regarding both areas and then walking you through both of them.

If you have questions, please feel free to put them in the chat, and we will answer them at the end of the presentation.



You will enter the monitoring component through the District MICIP portfolio. Below each goal you will see a button for monitor and for evaluate. To begin the monitoring process, you will click on the monitor button.

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When you monitor, there are some important things to keep in mind.

First, monitoring involves both implementation and impact. Implementation has three components:

- Fidelity of Implementation to what extent have we implemented the strategy or activity as intended? If you attended yesterday's continuous improvement conference, you heard our keynote speaker also talk about the integrity of implementation. If you happen to be using a strategy implementation guide to identify what the fidelity of strategy implementation looks and sounds like, we believe that the section on acceptable variations addressing this concept.
- Scale/Reach to what extent are we reaching the intended populations, such as the number of schools,

- teachers, grade levels, students, etc.? Scale and reach refer to inputs rather than outputs and, therefore, is different than the impact on these populations.
- Capacity to what extent are we supporting those implementing the plan with sufficient resources, including human, financial, technology, material, time, and others.

Depending on the strategy or activity, impact can be defined in a number of ways; in MICIP we are primarily talking about whether we are making appropriate progress on our interim and end targets aligned to the goal.

Secondly, evidence is critical. We don't want to base judgments regarding implementation or impact simply on hunches; we need to base them on evidence, on data. Deciding on what data you will collect as your evidence, how you will collect it, and the frequency with which it is collected are all important parts of the planning process. Since the Monitor component of the platform is ready several months before the Adjust section, along with the ability to upload evidence, it is critical that the evidence be stored someplace for eventual upload, whether in a paper file, a Google folder or something similar. The guide suggests a number of tools that you might consider using to gather this data.

Thirdly, monitoring is the responsibility of both the

district and the school/program.

- The school/program must monitor the goals specifically assigned to it as part of the district continuous improvement plan and then report that data back to the district continuous improvement team. Monitoring can be done at a variety of scales. It might include self-monitoring, monitoring by a grade level or department, or across the entire building.
- The district must collect the data related to the goals/strategies/activities assigned to the various schools/programs for district-wide analysis. It is also accountable for collecting data on those goals that are only the responsibility of the district.
- Both the district and school are responsible for the analysis of the data regarding the plans to which they have been assigned.

Monitor – Other considerations

- Monitoring must be considered when engaging in the other components of the MICIP process.
- · Monitoring informs movement between stages of implementation.
 - From installation to initial implementation
 - · From initial implementation to full implementation
 - Back to a previous stage
 - · Entire district or school by school
- Monitoring may look different depending on the kind of goal academic, non-academic, systems.
- It is critical that districts and schools monitor the effectiveness of its systems as part of implementation.
- · It is also important to monitor the entire continuous improvement process
 - · Implementation Fidelity of implementation, scale/reach, capacity
 - Impact
- It is critical to communicate the results of monitoring.
 - · What needs to be communicated?
 - · To whom does it need to be communicated?
 - · When does it need to be communicated?
 - How does it need to be communicated?

There are a few other considerations when monitoring.

- o Monitoring is not just its own component of the continuous improvement cycle; it is also related to the other components. The team cannot think about monitoring for the first time when it's time to monitor. It must consider the monitoring elements of fidelity, scale/reach, capacity, and impact when engaging in the Assess Needs, Plan, and Implement processes as well. It must also consider the equity lens when thinking about monitoring.
- Monitoring can inform movement between the various stages of implementation.
 - From installation to initial implementation
 - o From initial implementation to full implementation.
 - Moving back to a previous stage
 - How the scale of implementation will take place, whether across the entire district at the same time or by smaller chunks, including certain schools, grade

levels/departments, or other units.

- Monitoring might look different depending on the kind of goal, whether primarily academic, non-academic, or systems, even though districts are encouraged to create goals that incorporate the various kinds.
- It is critical that districts and schools monitor the effectiveness of its systems as part of implementation. Implementation is frequently impacted by the presence or lack of strong systems to support it. This requires returning to the district systems framework and the tool(s) aligned to it and asking whether the necessary systems components are in place and how their status might be impacting implementation and impact.
- Even though monitoring typically takes place at the goal, strategy, or activity level, it is also important periodically to monitor the entire continuous improvement process and ask the same questions about implementation and impact.
- As part of the monitoring process, it is important to consider what needs to be communicated regarding the results of the monitoring process, including to whom, when and how. That doesn't mean we need to communicate about the entire plan or to the entire spectrum of stakeholders every time monitoring takes place. That communication might only involve a small group of stakeholders regarding a limited part of the plan. At the same time, it is important to consider what communication may need to take place with each monitoring cycle.



Adjust

- Data Story Considerations:
 - What monitoring data will give a more complete picture of your plan?
- Goal Considerations:
 - Do timelines for interim/end targets need to be adjusted forward or backward?
 - What will be the impact of those adjustments?
 - How do adjustments to the plan affect individual schools or target populations?
 - Have you allowed sufficient time for implementation of the plan?
 - · Have you allowed time for an implementation dip when implementing a new strategy?
 - · Have you provided the supports and resources needed to implement a strategy?
- Strategy/Activity Considerations:
 - · Have you allowed time for an implementation dip when implementing a new strategy?
 - Have you provided the supports and resources needed to implement a strategy?
 - Have you completed the activities according to their timelines?
 - · Are there barriers to implementation and, if so, have they been addressed?
- General Consideration What impact might the adjustment have on impacted populations, especially unintended negative impacts on certain populations?

When it comes time to consider adjusting, adjustments in MICIP can be made in three areas: the data story, the goal, or strategies and activities. In each of these categories there are some considerations that the platform will prompt. The list below is not exhaustive but some of the more important ones.

Data Story

 What monitoring data will give a more complete picture of the plan?

Goal

Do timelines for interim targets need to be adjusted

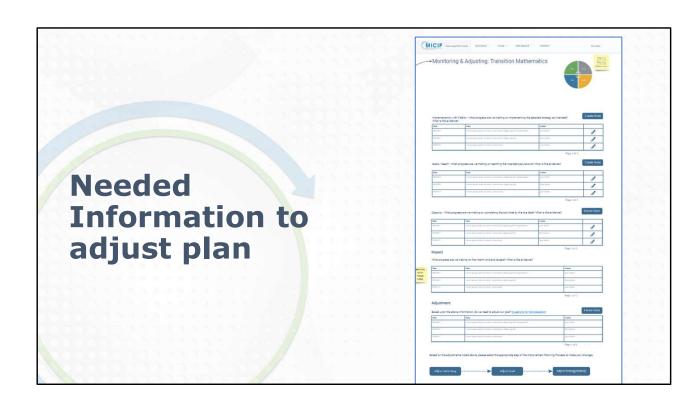
- forward or backward? What will be the impact of those adjustments?
- Using an equity lens, how will adjustments to the plan affect individual schools or target populations?
- Has sufficient time been devoted to implementation of the plan, including time for an implementation dip that frequently accompanies implementation of a new strategy?
- Have the necessary supports and resources been provided for high quality implementation?

Strategy/Activity

- Has sufficient time been devoted to implementation of the plan, including time for an implementation dip that frequently accompanies implementation of a new strategy?
- Have the necessary supports and resources been provided for high quality implementation?
- Have the activities been completed according to their timelines?
- Are there barriers to implementation and, if so, have they been addressed?

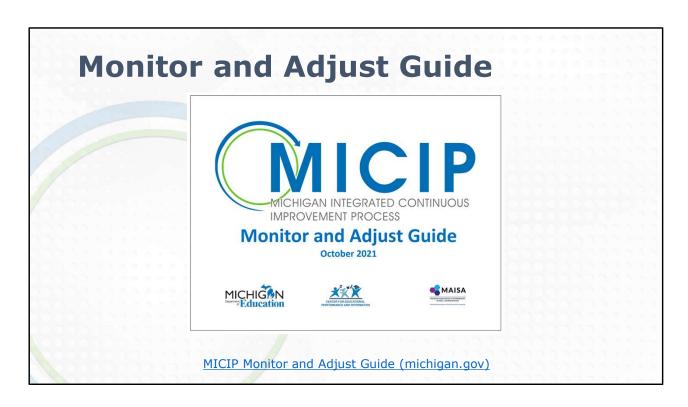
When making adjustments, it is also important to

understand the impact that the adjustment might have and to consider whether it will have unintended negative impacts, especially on certain populations.









To support this process we did construct a Monitor and Adjust Guide. Right now it's separate from the main Process Guide, but it will be rolled into that in January when we do a more comprehensive update.

Thank you for attending today's session

Ben Boerkoel
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