Building and Managing Goals and Plans

The Adaptive System of School Improvement Support Tools (ASSIST™) provides a step-by-step process by which schools and school systems can identify goals, construct measureable objectives, identify strategies and define activities. ASSIST takes the guesswork out of planning by allowing the user to respond to a series of guiding questions that result in a quality measurable objective. The system then allows the user to identify strategies and activities to meet each objective. This is a thorough process by which the user assigns resources, establishes timelines and identifies staff responsible for implementation. Once goals are built in ASSIST, the user can assign goals to create various improvement plans and print working documents.

This component of ASSIST is dynamic and supports the continuous improvement process by allowing schools and school systems to reuse the goals to construct various plans as needed, as well as track the implementation of goals and plans while allowing for the ongoing modification and addition of goals based on new data and information.

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Goals and Plans can be accessed by logging into the Adaptive System of School Improvement Support Tools (ASSIST) at www.advanc-ed.org/assist.

To access ASSIST, enter your email address and password on the login page. Once successfully logged in, select the ASSIST link.

If you need additional assistance with the login process, refer to the ASSIST Quick Start Guide at www.advanc-ed.org/assistreresources.

If you have completed an External Review during the 2016-2017 year, you will see your Index of Education Quality™ (IEQ™) dashboard after logging into ASSIST. Select Portfolio to go to your account. You can find all tasks assigned to your school in the Documents section.

If you do not yet have an IEQ Dashboard, select the Goals & Plans tab.
Select *Create a Goal* to build an unlimited number of goals.

### Step 1: Goal Name

Select *Create a Goal* to begin the Goal Builder process. Type a goal into the narrative box provided.

**Definition:**  
A goal is a brief statement reflecting an end result or desired condition you want to achieve.

**Example:**  
All students will be proficient in mathematics.

Next, determine if your goal is Type 1 (academic) or Type 2 (organizational). Your selection determines which prompts are provided during the construction of your measurable objective in Step 2.

**Definition:**  
An academic goal is a goal that aims to meet some criteria related to student academic performance, competency or achievement. (Type 1)

**Definition:**  
An organizational goal is a goal that aims to meet non-academic criteria that pertain to the institution itself. (Type 2)

Once your goal is complete, select *Continue.*
Step 2: Objective

The construction of a measurable objective in ASSIST is done systematically using a series of prompting questions with a wizard-like tool. Below is an outline of how the measurable objective questions are prompted depending on the goal type selected during Step 1 above.

Academic Goal

Constructing a measurable objective for an academic goal is a six-step process.

1. **Who?**
   Select *Yes - Identify Specific Populations* to choose the target population using the check boxes provided for gender, grades and subgroups or select *No - The Objective is to be applied to all students*. Select *Next*.

   In order to make one or more selection within a category, select the *category* to activate the *boxes* below.

2. **Proportion?**
   Identify a *proportion* using the *drop-down menu* and then provide a *count* or *percentage* in the *narrative box*. Select *Next*. 

   ![Goal Builder](image)
   ![Goal Builder](image)
3. **What?**
   Select a *content area* from the *drop-down menu*. Identify what the target population should be able to achieve by using the *drop-down menu* and *narrative box* to construct a *complete statement*. Select *Next*.

4. **Measured By?**
   Enter the *measurement* to be used for this objective in the *narrative box*. Select *Next*.

5. **By When?**
   Use the *calendar* to select a *date*. Select *Next*.

6. **Preview**
   Review the *measurable objective* constructed from the information provided in the steps above. If you are satisfied, select *Accept*. If you need to make changes, select *Back*. 
Organizational Goal

Constructing a measurable objective for an organizational goal is a four-step process.

1. What?
State what will be achieved upon completion of the objective using the drop-down menu and narrative box to construct a complete statement. Select Next.

2. Measured By?
Enter the measurement to be used for this objective in the narrative box. Select Next.

3. By When?
Use the calendar to select a date. Select Next.

4. Preview
Review the measurable objective constructed from the information provided in the steps above. If you are satisfied, select Accept. If you need to make changes, select Back.
Step 3: Strategy

Every objective in ASSIST must have at least one strategy and activity. Multiple strategies can be provided for a single objective. See the Adding Goal Components section of this document for instructions on how to add multiple strategies to the same objective. When adding a strategy to a measurable objective, the system allows you to add an existing strategy if one or more strategies already exist within the goal.

Definition: A strategy is an action that is specific, planned, evidence-based and focused on student results to accomplish a goal and objective. A strategy can be thought of as the “how” to achieve the objective and/or goal. There can be multiple strategies to achieve each measurable objective.

Example: *Non-Linguistic Representation* — Staff will implement appropriate non-linguistic representation tools to increase the mathematical critical thinking abilities of all students including African Americans and students with disabilities.

*Research* — The implementation of Thinking Maps as a way to deliver non-linguistic representation has been shown to increase student achievement in reading in the content areas for different populations of students, including students with disabilities. *(Student Success with Thinking Maps, edited by David Hyerle)*

To create a new strategy:

Provide a **Strategy Name** and brief **Description** of the strategy.

NOTE: All strategies must have a unique name.

Next, describe how the strategy will work and how it will be implemented. State the **Research** used to support this strategy. Select **Next**.

If you are satisfied, select **Accept**. If you need to make changes, select **Back**.

NOTE: Research must be provided to meet Title I requirements.
If you choose to link an existing strategy that you already have created, select **Choose an Existing Strategy**, select the **strategy** you wish to use and select **Add Selected Strategy**. This option will only appear if one or more existing strategies are available to add.

### Sharing Strategies across Objectives

Shared strategies are flagged in ASSIST and the plan for easy identification. The **Activity by Funding Source** breakdown at the end of the plan is unduplicated.

**Sample SIP output for a shared strategy**

**Measurable Objective 3:**
A 15% increase of Third and Fourth grade students will demonstrate daily BOE’s.

[shared] Strategy 1:
Reading Strategies - Reading strategies will be taught to non-

Unassociate a shared strategy by selecting **Remove** link under the **Action** menu. This will not delete the strategy.
Sharing a strategy automatically shares the activities within that strategy.

Select the **strategy name** to open a pop-up window with the **strategy description** and list of **activities** within the strategy.

**Deleting a Strategy**

Within the goal builder, if a goal or objective is deleted, all of the strategies and activities associated with the goal or objective also are deleted. Once the strategies have been deleted, they are considered a retired strategy and the name of the strategy cannot be reused. Strategies and activities must be orphaned before deleting the goal or objective to be reused.

**Orphaning a Strategy**

The strategy is orphaned and ready to be adopted by another objective. Create your **objective** using the previous process.

**At Step 3: Strategy**, select **Choose an existing strategy**.
Step 4: Activity

Every strategy in ASSIST must have at least one activity. Multiple activities can be provided for a single strategy. See the Adding Goal Components section of this document for instructions on how to add multiple activities.

Definition: An activity is an individual task or function performed as part of an overall strategy for instruction or improvement. Activities are specific and include a comprehensive description of the steps to be taken, timelines, resource allocations, staff responsible and a defined activity type (e.g., professional development, direct instruction, community engagement, etc.). Multiple activities may be required to address each strategy.

Example: Monitor Implementation of Writing to Win Strategies
Monitor the implementation of the instructional strategies through walk-thrus and program fidelity checks. 1/5/2011 — 5/10/2012, $0, Principal, Literacy Coach, Other.
Provide an **Activity Name** and brief **Activity Description**. Using the **drop-down menu** provided, identify an **Activity Type**.

**Note:** An **Other** option is available if your activity does not fit within one of the pre-defined types.

Use the **calendar** to select activity **Begin Date** and **End Date**.

Use the **drop-down menu** to select a **Funding Source** and type a **Funding Amount** into the **box** provided.

**Note:** Multiple funding sources can be added to a single activity. See the **Editing a Goal** section of this guide for instructions.

**If no funding** is required for the activity, select that option from the **drop-down menu**.
The last element is the **Responsible Staff**. Using the **narrative box** provided, list the **staff responsible** for activity implementation and oversight. Separate each name by a comma or hard return.

Once every field is complete, select **Next**. If you need to make changes, select **Back**. If you are satisfied with your activity, select **Accept**.

Once you complete a goal, objective, strategy and activity, you will be redirected to the **Goal Details** page that shows the hierarchy of the goal. Select **Action** to view the full goal component and/or make edits.
Adding Goal Components

Additional components (i.e., objectives, strategies and activities) can be added to a goal at any time.

From the Goals & Plans overview page, select the goal for which you would like to add components.

From the Goal Details page, select Action for the level above where you want to add a component. For example, if you want to add a strategy, select Action at the objective level.
Adding a *goal component* takes you to that specific page where you can provide the additional *objective, strategy or activity* information and *Accept.*

Goals in ASSIST are never locked. Edit a goal or any of its components (i.e., objectives, strategies, activities and funding sources) at any time by selecting the *goal* from the *Goals & Plans* overview page.

From the *Goal Details* page, select *Action* for the component that needs to be edited and select *Edit.*

Depending on the component chosen for editing, you will be taken to a screen where you can make the desired edits. For example, when editing an objective, you have the ability to select each section of the objective to make changes.
Add a Resource
To add an additional resource (funding source) to an Activity, use the process outlined above to edit the Activity and then scroll to the bottom of the page and select Add Resource.

Repeat this process as needed until all resources have been added to the Activity. Select Update on the Activity page.

Creating a Plan
Using the goals created in your institution’s ASSIST account, you can create an unlimited number of plans.

From the Goals & Plans overview page, select the Plans tab and select Create a Plan.

Provide a name and description for your plan.

The name you provide will show on the plan output and help differentiate one plan from another on the Goals & Plans overview page.

The plan name can be changed at a later time.
Next, select the **goals** you want to include in the plan. Selecting at the goal level automatically selects all objectives, strategies and activities within that goal.

Selecting at a lower level, such as the activity, allows for only that specific activity and its related strategy, objective and goal to be included in the plan.

The flexibility of the ASSIST plan builder allows for the creation of multiple plans (e.g., Technology Plans, Professional Development Plans, 30-60-90 Day Plans, etc.), without requiring any duplication of effort.

Once you have selected all the desired goals, select **Save**. Select **View PDF** to view your plan output.

**Note:** If you update a goal component after it has been included in a plan, the plan includes only the changes if you return to the plan and remove and re-add the changed goal component and save the plan changes.
Once you have built goals in ASSIST you can use the **Progress Note** functionality to track implementation.

To begin, select the **goal** for which you would like to track progress from the **Goals & Plans overview** page.

From the **Goal Details** page, select **Action** for the component where you would like to make a progress note. Select **Add Progress Note** from the menu. Progress notes can be added at all levels of the goal.

Type your **comment** in the **pop-up window**. You can add an additional progress status at the measurable objective and activity levels.

**Measurable Objective:** Met or Not Met

**Activity:** In Progress, Complete, Not Completed or Not Applicable

Provide the desired **comment and/or progress status** and select **Save**.
The number of progress notes added to each goal component is displayed on the Goal Details page.

To view the Progress Log of all notes provided for a goal component, select Notes.

Include Progress Notes in a Plan
Progress notes can be included in the plan output if desired. If you have already created the plan, select the Plans tab from the Goals & Plans overview page and select the plan.

Scroll to the bottom of the View Plan page and select Edit Plan to open the Create or Edit Plan screen, where you will find an option to include progress notes.

Check the box and select Save. The progress notes are included when you view the plan output.
Goals Reporting

Reporting provides a way to export activity and strategy information in a CSV or Excel format to support the ongoing management and oversight of the improvement process.

From the Goals & Plans tab, select the Reports tab. Select the report name of the report you want to access.

Upon selecting the report, the system presents a series of filtering criteria. Select the criteria you want to include in your report output.

For example, if you want to view all professional learning activities scheduled to take place between March 1, 2013 and August 1, 2013, select the Activity Type of Professional Learning from the drop-down menu and enter the applicable Activity begin and end dates.

Once your criterion is identified, select Export as CSV or Export as EXCEL. The system will email you the requested file within 10-15 minutes.