

# Action Planning Guide for Social-Emotional Wellness

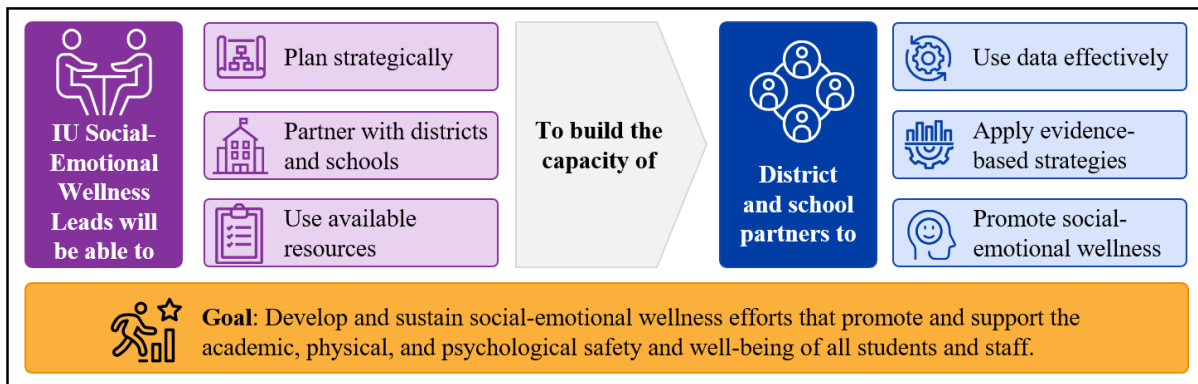
**Process and Resources to Support Evidence-  
Informed Programming**



## Introduction

This guide provides an **evidence-informed process for planning and delivering social-emotional wellness supports**. Intermediate Unit (IU), district, and school staff can use the process and tools included in this guide to help build their capacity to develop and sustain social-emotional wellness efforts. For example, IU Social-Emotional Wellness leads can use this guide to plan professional development (PD) and technical assistance (TA) activities that support the social-emotional wellness needs of district and school partners. District and school staff can use the resources in this guide to build their capacity to use data effectively and apply evidence-based strategies to promote social-emotional wellness for students and staff.

### Objectives for using the Action Planning Guide



Building a systematic, data-driven approach to social-emotional wellness across the commonwealth looks like:

- **Following a structured process.** This guide outlines steps to identify social-emotional wellness needs and develop, deliver, and improve solution-focused and evidence-based PD and TA activities. By working through each step of the strategic planning process, you can make data-driven decisions about which supports to offer based on your partners' needs and strengthen your approach over time.
- **Promoting proactive approaches.** This guide includes tools to help IU, district, and school partners plan strategically to implement sustainable strategies that will support long-term, positive outcomes for students and staff.
- **Increasing buy-in and interest.** This guide suggests strategies for increasing school communities' interest in and engagement with social-emotional wellness supports.
- **Adapting to meet context-specific needs.** The guide promotes adaptability and encourages users to identify supports most responsive to local district and school community needs and contexts.

## Disclaimer

This work was funded by the U.S. Department of Education's Institute of Education Sciences (IES) under contract 91990022C0012, with the Regional Educational Laboratory Mid-Atlantic, administered by Mathematica. The content of the document does not necessarily reflect the views or policies of IES or the U.S. Department of Education, nor does mention of trade names, commercial products, or organizations imply endorsement by the U.S. government.

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## Six-step strategic planning process

This guide contains a collection of more than 15 resources, organized according to the six steps of the Pennsylvania Department of Education's Accelerated Learning Framework Cycle of Continuous Improvement. To follow the six-step strategic process, follow these key actions and high-level timeline.

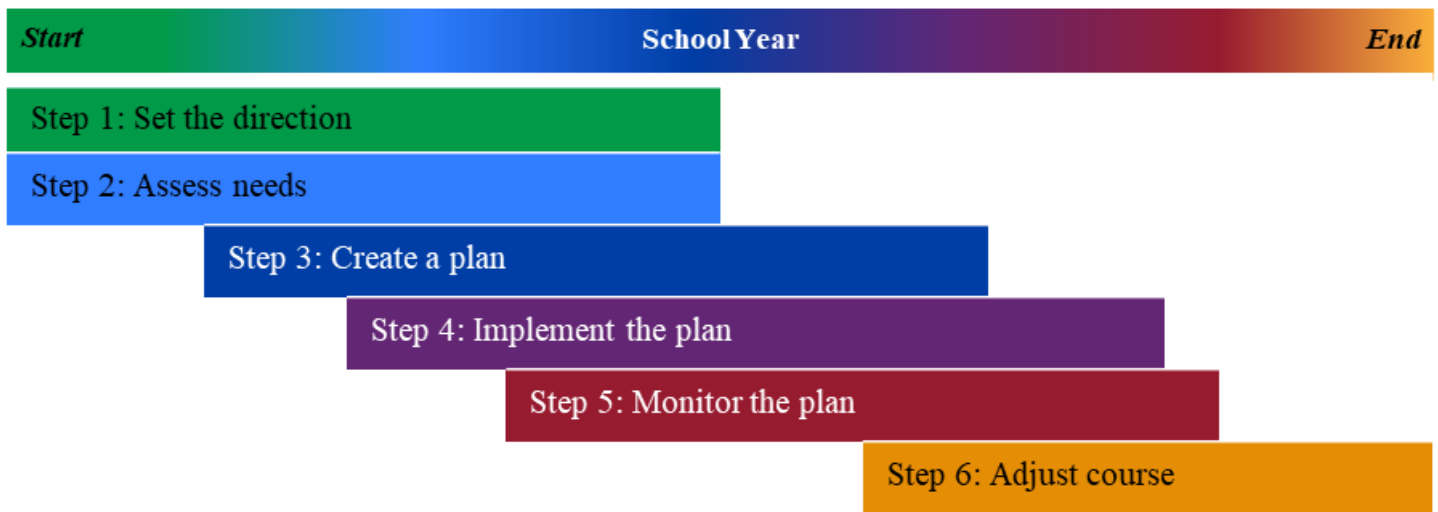


**Image Description:** Circular diagram titled “Strategic action planning process” with six connected, color-coded steps arranged around a central circle.

- **Step 1: Set the direction (green)**
  - Assess capacity
  - Build a common language
  - Grow sustainable relationships
- **Step 2: Assess needs (blue)**
  - Explore needs
  - Use data to look closer
  - Identify patterns and priorities
- **Step 3: Create a plan (dark blue)**
  - Set goals
  - Identify evidence-based supports
  - Make an action plan
- **Step 4: Implement the plan (purple)**
  - Communicate intentionally
  - Prioritize accessibility and engagement
- **Step 5: Monitor the plan (red)**
  - Collect data
  - Record activities
- **Step 6: Adjust course (orange)**
  - Reflect on progress
  - Prepare for future planning

Arrows connect the steps in a continuous loop, emphasizing an ongoing and cyclical process.

## High-level timeline



**Image Description:** Horizontal timeline labeled *School Year* from *Start* to *End*. Six staggered colored bars represent overlapping phases:

- Step 1: Set the direction (green, early in the year)
- Step 2: Assess needs (blue, early in the year)
- Step 3: Create a plan (dark blue, extends into mid-year)
- Step 4: Implement the plan (purple, mid-year)
- Step 5: Monitor the plan (red, mid to late year)
- Step 6: Adjust course (orange, late in the year).

## Step 1: Set the direction





This step helps lay the foundation for your work. Consider using these resources at the start of your planning and throughout the school year, as needed.





### Key actions

- ✓ **Assess your own capacity for this work**, including the time and resources you have to carry out your role.
- ✓ **Meet partners where they are** by understanding how districts and schools in your region perceive and engage with social-emotional wellness activities.
- ✓ **Build a common language** for discussing social-emotional wellness topics by using consistent and accessible messaging.
- ✓ **Grow sustainable relationships** by communicating thoughtfully with district and school partners.



### Resources

Resource	Type	Examples of how you can use this resource
<a href="#">1.a Capacity self-assessment</a>		<ul style="list-style-type: none"><li>• Use this checklist to self-assess the time, resources, and organizational support you have to carry out your role and identify existing tools and partners to fill in capacity gaps.</li><li>• Through TA, guide district and school partners in completing this checklist as a self-assessment of their capacity for social-emotional wellness work.</li></ul>
<a href="#">1.b Perceptions of social-emotional wellness reflection tool</a>		<ul style="list-style-type: none"><li>• Reflect on what you already know about how your district and school partners perceive and engage with social-emotional wellness activities to inform your messaging and selection of supports.</li><li>• Through TA, help district and school partners use this worksheet to self-assess their approach to social-emotional wellness programming.</li></ul>
<a href="#">1.c Explanations of social-emotional wellness topics</a>		<ul style="list-style-type: none"><li>• Use the talking points to explain and answer questions about social-emotional wellness topics during PD, TA, and informal communications with district and school partners.</li></ul>
<a href="#">1.d Engagement planning tool</a>		<ul style="list-style-type: none"><li>• Use this tool to consider the different partners and community members you plan to reach with your social-emotional wellness supports, including the topics that interest them and your approach to engaging them.</li></ul>

### Resource types

-  **Tools:** Interactive tables, checklists, and worksheets that are designed to be printed and filled out by hand or completed by typing into the document.
-  **Informational resources:** Easy-to-read tip sheets and summaries designed as reference documents or materials to be repurposed for PD and TA activities.



## Resource 1.a Capacity self-assessment

 <b>IU Social-Emotional Wellness Leads</b>	 <b>District and school partners</b>
Self-assess your capacity to carry out your role and identify strategies to fill in capacity gaps.	Help partners reflect on their capacity to develop and sustain social-emotional wellness supports.

Do I have...? Check the capacity indicators that apply to you.	What strengths do I have in this area? What are areas for improvement? Jot down your reflections.	What actions could I take to build capacity in this area? Consider these next steps.
<input type="checkbox"/> Buy-in and engagement from the partners I hope to work with?		<ul style="list-style-type: none"> <li>Explore <a href="#">Resource 1.c</a>, <a href="#">Resource 1.d</a>, and <a href="#">Resource 4.a</a> for ideas on how to thoughtfully engage partners with diverse needs.</li> </ul>
<input type="checkbox"/> Understanding of the contexts, needs, and goals of the partners I plan to work with?		<ul style="list-style-type: none"> <li>Use the <a href="#">Step 2 resources</a> to explore the needs of district and school partners.</li> </ul>
<input type="checkbox"/> Time set aside to plan and deliver social-emotional wellness supports?		<ul style="list-style-type: none"> <li>As you use <a href="#">Resource 3.c</a> to create a plan for the school year, structure in time for your own planning.</li> </ul>
<input type="checkbox"/> Access to high-quality, evidence-based strategies and materials for delivering supports?		<ul style="list-style-type: none"> <li>Apply the guidance in <a href="#">Resource 3.b</a> to identify evidence-based strategies.</li> <li>Access additional resources on the Pennsylvania Department of Education (PDE) <a href="#">Climate and Well-Being</a></li> </ul>
<input type="checkbox"/> Opportunities to share best practices and problem solve with peers?		<ul style="list-style-type: none"> <li>Engage with role-alike communities.</li> <li>Contact PDE OSS staff with ideas and questions.</li> </ul>



## Resource 1.b Perceptions of social-emotional wellness reflection tool

 <b>IU Social-Emotional Wellness Leads</b>	 <b>District and school partners</b>
Reflect on how your partners perceive and engage with social-emotional wellness activities to inform your planning.	Help partners use this worksheet to self-assess their approach to social-emotional wellness programming.

### *How do partners perceive social-emotional wellness programming?*



Question	Response
How do partners <b>describe</b> social-emotional wellness activities? What buzzwords or phrases do they use most often? What aspects of social-emotional wellness do they value most?	
What words, phrases, or concepts are <b>taboo or avoided</b> ? What aspects of social-emotional wellness do they value the least? What concerns do they have?	
Considering what you know about partners' perceptions of social-emotional wellness programming, <b>how can you "speak their language"</b> when discussing social-emotional wellness topics?	

### *How do partners engage with social-emotional wellness programming?*

Question	Response
What <b>motivates</b> partners to engage with social-emotional wellness programming? How are partners currently approaching this programming? What kinds of programs are most popular?	
What words, phrases, or concepts <b>are taboo or avoided</b> ? What aspects of social-emotional wellness do they value the least? What concerns do they have?	
Considering what you know about partners' engagement with social-emotional wellness programming, how can you <b>appeal to their motivations</b> for this work? How can you assuage their concerns?	



## Resource 1.c Explanations of social-emotional wellness topics

 <b>IU Social-Emotional Wellness Leads</b>	 <b>District and school partners</b>
Explain and answer questions about social-emotional wellness topics during PD, TA, and informal communications with partners.	Build a common language around social-emotional wellness topics by using these talking points with educators and community members.

### ***Define social-emotional wellness and related supports***

Question	Response
<b>What is social-emotional wellness for students?</b>	<ul style="list-style-type: none"> <li>• Student social-emotional wellness includes but is not limited to (1) responsible decision-making, (2) mental and emotional well-being, (3) resilience and confidence, (4) self-awareness and self-management, and (5) establishing and maintaining relationships.</li> <li>• We can promote students' social-emotional wellness by helping them develop these attitudes and skills.</li> </ul>
<b>What is social-emotional wellness for staff?</b>	<ul style="list-style-type: none"> <li>• Staff social-emotional wellness includes but is not limited to (1) self-efficacy, (2) mental and emotional well-being, (3) opportunities for professional learning and growth, and (4) professional well-being and job satisfaction.</li> <li>• We can promote staff social-emotional wellness by providing supports and structures that develop these qualities.</li> </ul>
<b>Social-emotional wellness is NOT...</b>	<ul style="list-style-type: none"> <li>• A buzzword or fad. Research consistently points to promoting social-emotional wellness as a critical foundation for learning and life success and a long-term priority. By promoting social-emotional wellness and safe and supportive learning environments, we encourage positive outcomes for students, including improved academic achievement, and for staff, including improved retention and school climate.</li> <li>• A fictional or overblown issue. There is widespread evidence that students and staff in our area, and across the country, have unmet social-emotional wellness needs. Poor social-emotional wellness can negatively affect students' attitudes and behaviors, academic achievement, and long-term outcomes, as well as teacher retention and burnout.</li> <li>• A substitute for academic skills. Programs and practices that promote social-emotional wellness go hand-in-hand with traditional academic learning. In fact, improved student and staff social-emotional wellness is associated with increases in student academic achievement and attainment.</li> <li>• A topic better left to households. Schools can play an important role in reinforcing social-emotional wellness for students. Schools are places where social-emotional wellness skills are practiced because they are places students navigate communication and relationships with peers and adults. Comprehensive, school-based supports that adapt to student and staff needs are an evidence-based approach to enhancing academic and social-emotional wellness outcomes for all students.</li> </ul>

Question	Response
<b>What are safe and supportive learning environments and how do they relate to social-emotional wellness?</b>	<ul style="list-style-type: none"> <li>• In supportive learning environments, students feel a sense of safety and belonging and have positive relationships with peers and adults.</li> <li>• Safe and supportive learning environments are characterized by (1) supportive interpersonal relationships, (2) support for learning and development, (3) physical and psychological safety, and (4) social inclusion.</li> <li>• Research suggests that student and staff social-emotional wellness and safe and supportive learning environments work cohesively to enable positive outcomes for students.</li> </ul>
<b>What do social-emotional wellness programs and practices look like?</b>	<ul style="list-style-type: none"> <li>• Leaders are encouraged to promote various programs, practices, and supports with proven effectiveness for students and staff.</li> <li>• Programs and practices may be integrated within larger systems of support that adapt to student and staff needs, such as positive behavior interventions and supports (PBIS) and multi-tiered systems of support (MTSS).</li> <li>• Individual supports for students can include evidence-based mental health and behavioral health programs, prevention programs, attendance support, social-emotional learning, career-readiness skills, prosocial activities, and other programs that support classrooms and individuals.</li> <li>• Leaders are also encouraged to provide and promote professional development opportunities for staff at all levels to build sustainable and sufficient system capacity to implement social-emotional wellness supports.</li> </ul>
<b>What role can district and school staff play in promoting social-emotional wellness?</b>	<ul style="list-style-type: none"> <li>• Promote staff and community engagement by using everyday language and concrete examples about social-emotional wellness concepts.</li> <li>• Engage in data analysis and conversations with staff and students (as reasonable) to assess social-emotional wellness needs.</li> <li>• Promote the adoption of evidence-based social-emotional wellness programs and practices. Make relevant resources available and deliver supports (as feasible).</li> <li>• Build capacity of staff to deliver social-emotional wellness supports by offering high-quality PD.</li> </ul>



**Explain reasons for prioritizing the promotion of social-emotional wellness and safe and supportive learning environments**

Question	Response
<b>Why are we focused on promoting social-emotional wellness and safe and supportive learning environments?</b>	<ul style="list-style-type: none"> <li>• Social-emotional wellness provides a critical foundation for learning and life success.</li> <li>• By creating safe learning environments, we enable the formation of positive and supportive relationships and improve conditions for learning.</li> <li>• Students and staff in our communities exhibit social-emotional wellness needs that deserve to be addressed.</li> </ul>
<b>What are the other benefits of social-emotional wellness for students?</b>	<ul style="list-style-type: none"> <li>• <i>Attitudes and behavior.</i> Students who engage with evidence-based interventions show improved attitudes toward themselves and others, increased positive social behaviors, and reduced behavioral problems.</li> <li>• <i>Academic achievement.</i> Students who participate in social-emotional learning programs that seek to boost emotional regulation and responsible decision-making experience improved academic achievement and educational attainment.</li> <li>• <i>Long-term outcomes.</i> Students with strong social and emotional skills experience more positive outcomes later in life, such as in the areas of employment, criminal activity, substance abuse, relationship health, and mental health.</li> </ul>
<b>What are the other benefits of social-emotional wellness for staff?</b>	<ul style="list-style-type: none"> <li>• <i>Retention.</i> The wellness of teachers, especially positive emotions in the workplace, plays an important role in job satisfaction and retention.</li> <li>• <i>Student achievement.</i> When teachers experience burnout and stress, student achievement and wellness can decline.</li> <li>• <i>School climate.</i> Trust and community among teachers are strong predictors of the success of schools' improvement initiatives, while teacher stress is linked to negative effects on broader school climate.</li> </ul>

**Describe the Pennsylvania Department of Education's Office for Safe Schools' (OSS's) approach to promoting social-emotional wellness and safe and supportive learning environments**

Question	Response
<b>What is OSS's social-emotional wellness goal for students, staff, and communities?</b>	<ul style="list-style-type: none"> <li>• OSS's aim is to develop and sustain equitable, trauma-informed learning environments that promote and support the academic, physical, and psychological safety and well-being of all students and staff.</li> <li>• To reach this goal, we must begin by listening and responding to the social-emotional wellness needs of students, staff, and families in our community.</li> </ul>
<b>What guides OSS's efforts to promote social-emotional wellness?</b>	<ul style="list-style-type: none"> <li>• <i>Evidence-based practices.</i> OSS strives to apply practices with proven positive effects, to ensure the best outcomes for students and staff, and that time and resources are expended efficiently.</li> <li>• <i>Equitable trauma-informed learning environments.</i> OSS aims to develop trauma-informed learning environments and relationships that promote equity, inclusion, and belonging, so that students and staff feel safe and supported.</li> <li>• <i>MTSS.</i> OSS promotes comprehensive frameworks for school improvement that adapt to student and staff needs, enhancing the academic and social-emotional wellness outcomes for <i>all</i> students.</li> </ul>
<b>What role do IU Social-Emotional Wellness Leads play in promoting social-emotional wellness?</b>	<ul style="list-style-type: none"> <li>• Building district and school staff capacity to plan and deliver social-emotional wellness supports tailored to community need.</li> <li>• Promoting shared understanding and coordination of social-emotional wellness efforts across all levels of the Pennsylvania education system.</li> </ul>
<b>What can districts, schools, and community members expect from their IU Social-Emotional Wellness Lead?</b>	<ul style="list-style-type: none"> <li>• IU Social-Emotional Wellness Leads will provide resources, PD, and TA to district and school staff to build their capacity to (1) identify social-emotional wellness needs, and (2) plan, deliver, and improve social-emotional wellness supports for students and staff. All resources and supports can be tailored to individual district and school contexts.</li> <li>• They will also provide staff opportunities to collaboratively problem solve and plan for social-emotional wellness supports in their districts and schools.</li> </ul>

## Resource 1.d Engagement planning tool

 <b>IU Social-Emotional Wellness Leads</b>	 <b>District and school partners</b>
Consider the partners and community members you hope to reach with your social-emotional wellness supports. Identify topics that are important to them, the influence they have in their districts and schools, and how you hope to engage them.	Help partners consider the staff they will reach with social-emotional wellness activities in their districts and schools.

<b>Audience</b>	<b>Primary Contacts <i>Name, Contact Info</i></b>	<b>Key concerns, challenges, and motivators related to social-emotional wellness <i>Topics or needs</i></b>	<b>Level of influence they have over social-emotional wellness activities <i>Lots, some, minimal</i></b>	<b>How you hope to engage them (see Tip) <i>Inform, consult, involve, collaborate</i></b>
<b>Superintendents</b>				
<b>District administrators</b>				
<b>School leaders</b>				
<b>Teachers</b>				
<b>School-based mental health professionals</b>				
<b>Families and communities</b>				

<b>Audience</b>	<b>Primary Contacts Name, Contact Info</b>	<b>Key concerns, challenges, and motivators related to social- emotional wellness Topics or needs</b>	<b>Level of influence they have over social-emotional wellness activities Lots, some, minimal</b>	<b>How you hope to engage them (see Tip) Inform, consult, involve, collaborate</b>
<b>Students</b>				
<b>School boards</b>				

**Tip: Consider how to engage partners and community members.**

You can choose how to engage with partners based on what you know about their needs and level of influence over social-emotional wellness activities. There are four approaches to engagement that range in intensity:

- **Inform.** Provide basic updates about social-emotional wellness supports and activities from the IU to the focal audience. (Example: Keep informed via updates in your IU's newsletter.)
- **Consult.** Actively seek advice and feedback from the focal audience about social-emotional wellness supports and activities so they feel considered in the decision-making process. (Example: Survey audiences on supports and activities.)
- **Involve.** Purposefully involve the focal audience in the decision-making process so they feel valued and invested in the supports and activities. (Example: Ask audiences for their ideas on how to address certain challenges through IUs or enables audiences to vote on the IU activities that would best serve their needs.)
- **Collaborate.** Work together with the focal audience to co-create social-emotional wellness supports and activities to secure full buy-in to the work. (Example: Create a working group to develop a tool or resource with your IU.)

## Step 2: Assess needs





This step helps you identify where to focus your efforts. Consider using these resources near the beginning of the school year and revisiting them as needs evolve.





### Key actions

- ✓ **Explore your district and school partners' social-emotional wellness needs** through structured conversations about their observations and data.
- ✓ **Consider multiple dimensions of social-emotional wellness**, including outcomes related to student and staff social-emotional wellness and safe and supportive learning environments.
- ✓ **Use data to look closer**, including by guiding district and school partners to examine a range of social-emotional wellness data sources.
- ✓ **Identify patterns and priorities**, including specific areas of social-emotional wellness you can help districts and schools address.

### Resources



Resource	Type	Examples of how you can use this resource
<a href="#">2.a Discussion guide for exploring social-emotional wellness needs</a>		<ul style="list-style-type: none"><li>• Use this tool to guide discussions with district and school partners about their social-emotional wellness needs, including which are most pressing and how staff observe, measure, and track these needs.</li><li>• Through TA, help partners use the tool for their own information gathering.</li></ul>
<a href="#">2.b Three aspects of social-emotional wellness</a>		<ul style="list-style-type: none"><li>• During PD sessions, use this framework to highlight different aspects of social-emotional wellness and data sources related to each.</li></ul>
<a href="#">2.c List of social-emotional wellness data sources</a>		<ul style="list-style-type: none"><li>• During PD or TA, help district and school partners identify and examine data sources from this list to draw insights about the social-emotional wellness needs of their students, staff, and school community.</li></ul>
<a href="#">2.d Social-emotional wellness needs prioritization tool</a>		<ul style="list-style-type: none"><li>• Identify patterns and priorities in social-emotional wellness concerns across one or more partners to inform the PD you offer.</li><li>• Through TA, build the capacity of partners to analyze their social-emotional wellness data and prioritize areas to address.</li></ul>

### Resource types

-  **Tools:** Interactive tables, checklists, and worksheets that are designed to be printed and filled out by hand or completed by typing into this document.
-  **Informational resources:** Easy-to-read tip sheets and summaries designed as reference documents or materials to be repurposed for PD and TA activities.



## Resource 2.a Discussion guide for exploring social-emotional wellness needs

 <b>IU Social-Emotional Wellness Leads</b>	 <b>District and school partners</b>
<p>Lead structured conversations with partners about their social-emotional wellness needs, including which are most pressing and how staff observe, measure, and track these needs.</p>	<p>Help partners explore the social-emotional wellness needs of their school community and gather information from other school community members.</p>



### What are your main needs or challenges related to student social-emotional wellness?

- What strengths or challenges have you noticed related to students' responsible decision-making? Mental and emotional well-being? Resiliency and confidence? Self-awareness and self-management? Establishing and maintaining relationships?
- Which needs are most pressing? Why?
- Have these needs or challenges changed over time? In what ways?
- What unique needs do students in specific groups (for example, students from minority race or ethnicity groups, students with lower family income, students with disabilities, or multilingual learners) have in this area?



### What are your main needs or challenges related to staff social-emotional wellness?

- What strengths or challenges have you noticed related to teaching self-efficacy? Staff mental and emotional well-being? Opportunities for professional learning and growth? Professional well-being and job satisfaction?
- Which needs are most pressing? Why?
- Have these needs or challenges changed over time? In what ways?



### What are your main needs or challenges related to the school learning environment?



- What strengths or challenges have you noticed related to student and staff connectedness and engagement? Student and staff interpersonal relationships? Support for learning and development? Student physical and psychological safety? Social inclusion?
- Which needs are most pressing? Why?
- Have these needs or challenges changed over time? In what ways?



### How did you notice these challenges? How do you currently monitor or assess student and staff needs?

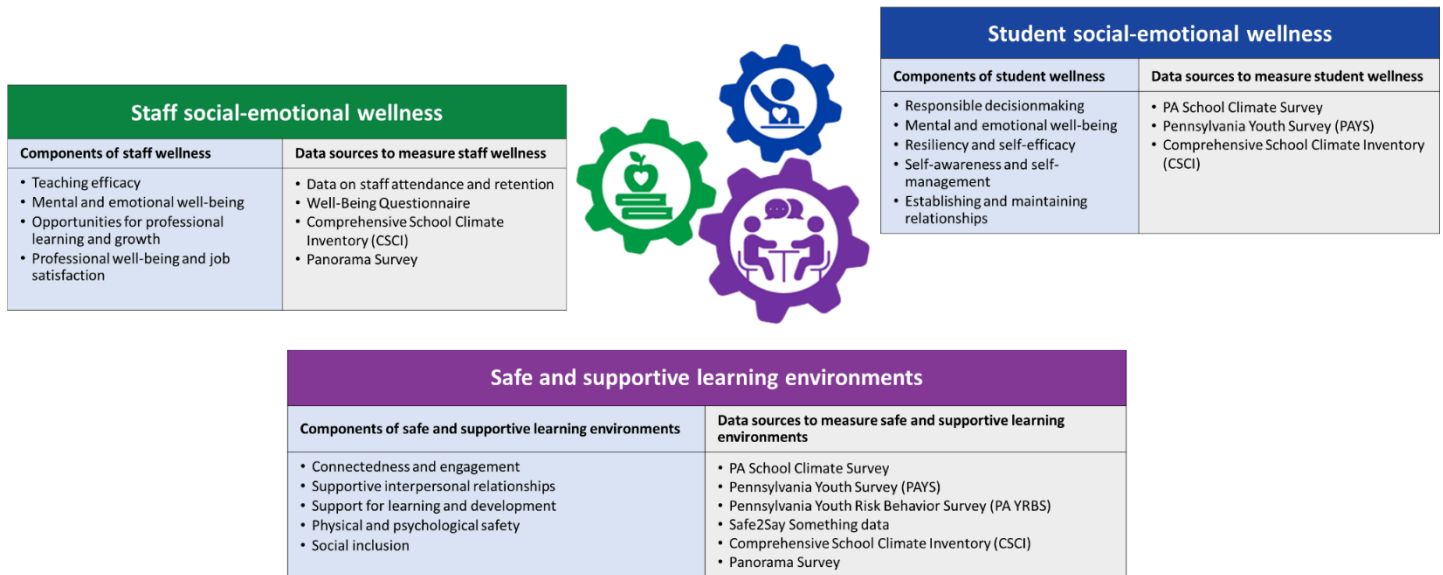
- For example, are your findings based on existing data, your experience, or from district or school staff? Do you currently use data to assess and monitor social-emotional wellness or learning environments in your schools? Which data source(s) do you currently use? Are there other data sources that could inform your findings?
- Do you have processes in place for analyzing your data and summarizing key findings? If not, is this an area in which your district or school needs support? What types of supports may be helpful?
- If you have findings from your data, what do they suggest about student or staff social-emotional wellness or the learning environment?
- To what extent are you interested in using additional data to assess and monitor social-emotional wellness and the learning environment? Which data source(s) from [Resource 2.c](#) may work well for you?

## Resource 2.b Three aspects of social-emotional wellness

 <b>IU Social-Emotional Wellness Leads</b>	 <b>District and school partners</b>
Use this framework to highlight different aspects of social-emotional wellness and data sources related to each.	Build partner capacity to recognize different aspects of social-emotional wellness and consider data on each.

### Social-Emotional Wellness Outcomes

Research suggests that **student and staff social-emotional wellness** and **safe and supportive learning environments** work cohesively to enable positive outcomes for students.<sup>1</sup>





**Image Description:** Infographic titled “Social-Emotional Wellness Outcomes”. At the top, a yellow callout states: “Research suggests that student and staff social-emotional wellness and safe and supportive learning environments work cohesively to enable positive outcomes for students.”

Three sections are displayed:

- Staff social-emotional wellness (green box):**
  - Components:** Teaching efficacy; Mental and emotional well-being; Opportunities for professional learning and growth; Professional well-being and job satisfaction.
  - Data sources:** Staff attendance and retention; Well-Being Questionnaire; Comprehensive School Climate Inventory (CSCI); Panorama Survey.
- Student social-emotional wellness (blue box):**
  - Components:** Responsible decision-making; Mental and emotional well-being; Resiliency and self-efficacy; Self-awareness and self-management; Establishing and maintaining relationships.
  - Data sources:** PA School Climate Survey; Pennsylvania Youth Survey (PAYS); Comprehensive School Climate Inventory (CSCI).
- Safe and supportive learning environments (purple box):**
  - Components:** Connectedness and engagement; Supportive interpersonal relationships; Support for learning and development; Physical and psychological safety; Social inclusion.
  - Data sources:** PA School Climate Survey; Pennsylvania Youth Survey (PAYS); Pennsylvania Youth Risk Behavior Survey (PA YRBS); Safe2Say Something data; Comprehensive School Climate Inventory (CSCI); Panorama Survey.

In the center, three interconnected gear icons represent staff wellness, student wellness, and supportive environments working together.

## Resource 2.c List of social-emotional wellness data sources

 <b>IU Social-Emotional Wellness Leads</b>	 <b>District and school partners</b>
Reference this list of data sources when providing TA to partners on effectively using social-emotional wellness data.	Help partners identify and examine data sources from this list to draw insights about the social-emotional wellness needs of their students, staff, and school community.

### Data source types





Student social-emotional wellness measure










Staff social-emotional wellness measure







Supportive learning environments measure

Data Source	Description	Who collects the data? How often are the data collected/reported?	At what level are the data reported?	How can I access the data?
<b>Discipline referrals</b> 	Discipline referrals may lend insight into dimensions of student social-emotional wellness and the learning environment, including responsible decision-making, social awareness, support for learning and development, and physical and psychological safety.	District or school staff collect the data and typically report the data annually.	School, district	Partner with staff who have access to school and district records systems
<b>Mental health referrals</b> 	Mental health referrals may suggest that individual students face mental health challenges. These data may lend insight into dimensions of student social-emotional wellness, including mental and emotional well-being, resiliency, and resilience.	District or school staff collect the data and typically report the data annually.	School, district	Partner with staff who have access to school and district records systems.



Data Source	Description	Who collects the data? How often are the data collected/reported?	At what level are the data reported?	How can I access the data?
<b>Safe2Say Something data</b> 	IU leadership may examine the number of Safe2Say Something reports for districts in their IU to measure physical and emotional safety. Safe2Say Something reports are anonymous tips submitted about safety concerns, including violence, unsafe behaviors, bullying, and potential for self-harm.	District Safe2Say teams collect the data and report the data annually.	District, IU	Partner with district Safe2Say teams with access to records systems.
<b>Student Assistance Program (SAP) referrals</b> 	Referrals to the SAP may suggest that individual students face challenges such as mental health issues or alcohol or drug abuse. These data may lend insight into dimensions of student social-emotional wellness, including mental and emotional well-being, resiliency, and self-efficacy.	District or school staff collect the data and typically report the data annually.	School, district	Partner with staff who have access to school and district records systems.
<b>Data on staff attendance and retention</b> 	District and school leadership may examine existing workforce data, including rates at which school staff attend work and remain in their positions year over year, to measure job satisfaction.	District or school staff collect the data and typically report the data annually.	School, district	Partner with staff who have access to school and district records systems.
<b>Data on student attendance and absenteeism</b> 	Student attendance data measure the percentage of school days in which students attend school. Chronic absenteeism data measure the percentage of students who were absent at or above a “chronic” threshold for the school year, usually defined as 10 days or more.	District or school staff collect the data and typically report the data annually.	School, district	Partner with staff who have access to school and district records systems.

Data Source	Description	Who collects the data? How often are the data collected/reported?	At what level are the data reported?	How can I access the data?
<b>Student dropout rate (grades 9–12)</b> 	The student dropout rate measures the percentage of students in grades 9–12 who drop out of school annually (without earning a high school diploma). These data may provide insight into some dimensions of social-emotional wellness and the learning environment, including mental and emotional well-being; life satisfaction and purpose; and connectedness and engagement.	District or school staff collect the data and typically report the data annually.	School, district	Partner with staff who have access to school and district records systems.
<b>Comprehensive School Climate Inventory (CSCI)</b> 	Survey developed by the <a href="#">National School Climate Center</a> to measure student, teacher, and staff perceptions of 14 components of school climate, including physical and emotional safety, support for learning and development, interpersonal relationships, connectedness and engagement, and social inclusion. <a href="#">A full list of dimensions the CSCI measures (PDF)</a>	Districts or schools may opt into this data source. District or school staff would collect the data. Visit the <a href="#">National School Climate Center website</a> for information about purchasing the CSCI.	Varies	Partner with district or school staff who choose to collect the data.
<b>Panorama Student Survey</b> 	Survey developed by senior researchers at education resources company Panorama Education to gather data from students about their classroom experience. The survey covers 19 key topics, from pedagogical effectiveness and school climate to student engagement and growth mindset.	Districts or schools may opt into this data source. District or school staff would collect the data. Visit the <a href="#">Panorama Education website</a> to download the student survey.	School, district	Partner with district or school staff who choose to collect the data.



Data Source	Description	Who collects the data? How often are the data collected/reported?	At what level are the data reported?	How can I access the data?
<b>Panorama Teacher and Staff Survey</b> 	Survey developed by senior researchers at education resources company Panorama Education to gather data from teachers and school staff on their professional well-being and perception of school climate and culture.	Districts or schools may opt into this data source. District or school staff would collect the data. Visit the <a href="#">Panorama Education website</a> to download the teacher and staff survey.	School, district	Partner with district or school staff who choose to collect the data.
<b>Pennsylvania School Climate Survey</b> 	Survey developed by PDE for school entities to administer to students, staff, caregivers, or community partners to measure perceptions of school climate, including student engagement and support, social-emotional learning, and physical and emotional safety. The Safe and Respectful School Climate subscale may be useful in assessing students' physical and emotional safety. The Social-Emotional Learning subscale may be useful for assessing students' supportive interpersonal relationships.	Districts or schools may opt into this data source. District or school staff would collect the data. If you'd like to administer the school climate survey in partnership with a school in your region, visit the <a href="#">PA School Climate Survey Site</a> for instructions and contact information.	School, district	Partner with district or school staff who choose to collect the data.

Data Source	Description	Who collects the data? How often are the data collected/reported?	At what level are the data reported?	How can I access the data?
<b>Pennsylvania Youth Risk Behavior Survey</b> 	Survey administered by PDE and the Pennsylvania Department of Health every two years to students from a sample of grade 9–12 classes in Pennsylvania. The survey contains items that measure students' sense of physical and emotional safety and engagement with unsafe behaviors, such as traffic safety, weapons and violence, alcohol and other drug use, sexual behavior, diet, and exercise.	The Pennsylvania Departments of Education and Health, with support from the Centers for Disease Control and Prevention (CDC) collect the data every two years.	State	Visit the <a href="#">CDC's Youth Risk Behavior Surveillance System webpage</a> . Select a Data Analysis Tool from the lower righthand side. The <a href="#">Youth Online Data Analysis Tool</a> will give you the most flexibility in the data you choose to view and analyze. In the "Select state" dropdown menu, select "State > Pennsylvania" and then select "Go."
<b>Pennsylvania Youth Survey (PAYS)</b> 	The PAYS emphasizes mental health and relationships. It is administered every two years to a sample of students in grades 6, 8, 10, and 12 in Pennsylvania. The survey contains items that measure students' sense of physical and emotional safety, mental and emotional well-being, and connectedness and engagement in school.	The Pennsylvania Commission on Crime and Delinquency (PCCD) selects schools to administer the survey every two years.	County, state	Visit the <a href="#">PCCD PAYS webpage</a>



Data Source	Description	Who collects the data? How often are the data collected/reported?	At what level are the data reported?	How can I access the data?
<b>The School Health Assessment and Performance Evaluation (SHAPE) System</b> 	SHAPE provides a collection of assessments and screenings for measuring schoolwide well-being. For example, SHAPE's School Mental Health Quality Assessment is designed for teams to assess the comprehensiveness of their school mental health system and to identify priority areas for improvement. The Quality Assessment comprises seven domains (Teaming, Needs Assessment/Resource Mapping, Screening, Mental Health Promotion, Early Intervention and Treatment, Funding and Sustainability, Impact).	Districts or schools may opt into this data source. District or school staff would collect these data.	School, district	Partner with district or school staff who choose to collect the data.
<b>Teacher Subjective Wellbeing Questionnaire</b> 	Survey developed by psychology researchers to measure teachers' job-specific well-being, including their sense of connectedness to and belonging at the school and sense of teaching efficacy.	Districts or schools may opt into this data source. District or school staff would collect these data.  Visit <a href="#">the EdInstruments webpage</a> for more information and follow the "Access and Use" link in the middle of the page. This will lead you to the questionnaire and user's guide	School, district	Partner with district or school staff who choose to collect the data.

## Resource 2.d Social-emotional wellness needs prioritization tool

 <b>IU Social-Emotional Wellness Leads</b>	 <b>District and school partners</b>
Identify patterns and priorities in social-emotional wellness concerns across one or more partners to inform the PD and TA you offer.	Build partner capacity to analyze their social-emotional wellness data and prioritize areas to address.

**Action 1: Consider all the data and observations you've gathered from partners and summarize key insights on their social-emotional wellness needs.**

Aspect of social-emotional wellness	Example data sources	What is the data telling you about your partners' needs for this aspect of social-emotional wellness? Consider data from one or more data sources.
<b>Student social-emotional wellness</b>	<ul style="list-style-type: none"> <li>• Student attendance</li> <li>• Referrals to Student Assistance Program or mental health support</li> <li>• Discipline incidents or referrals</li> <li>• Survey data such as the PA School Climate Survey, Pennsylvania Youth Survey (PAYS), Panorama Survey, and the like</li> <li>• Observations or comments from staff</li> </ul>	
<b>Staff social-emotional wellness</b>	<ul style="list-style-type: none"> <li>• Staff attendance or retention</li> <li>• Survey data such as the Teacher Subjective Wellbeing Questionnaire, the Panorama Survey, and the like</li> <li>• Observations or comments from staff</li> </ul>	
<b>Supportive learning environments</b>	<ul style="list-style-type: none"> <li>• Safe2Say Something reports</li> <li>• Survey data such as the PA School Climate Survey, The School Health Assessment and Performance Evaluation, PAYS, the Panorama Survey, and the like</li> <li>• Observations or comments from staff</li> </ul>	

**Action 2: Begin to prioritize which needs you can plan to address, given the frequency and urgency of the need and your capacity.**

**Questions for consideration when prioritizing needs**

**Which needs are coming up most frequently? Are there needs that multiple partners are reporting?**

**Which needs are most urgent? Which needs affect the highest numbers of students or staff? Which needs require immediate action to support student and staff well-being? Which needs may be a root cause for other challenges?**

**Which needs do you have the capacity to address? What initial strategies do you have in mind?**

**What questions do you have? What do you need more information on?**

## Step 3: Create a plan




This step helps you get specific about what you aim to accomplish and how. Consider using these resources near the beginning of the school year and revisiting them as you refine your planning.





### Key actions

- ✓ **Set goals** for the quality and impacts of your social-emotional wellness supports, and guide districts and schools to do the same.
- ✓ **Identify evidence-based supports** by searching resource centers for strategies you can share with district and school partners.
- ✓ **Make an action plan**, including specific activities, resources, and timelines to reach your goals.



### Resources

Resource	Type	Examples of how you can use this resource
<a href="#">3.a Goal-setting tool</a>		<ul style="list-style-type: none"><li>• Use this tool to set your own goals for the quality and reach of your social-emotional wellness supports.</li><li>• During TA, guide district and school partners to write goals for improving student and staff social-emotional wellness.</li></ul>
<a href="#">3.b Summary of evidence-based resource centers</a>		<ul style="list-style-type: none"><li>• This resource includes a list of evidence-based resource centers and strategies for using them to find social-emotional wellness programs.</li><li>• Use the resource centers and tips in this list to identify strategies and materials to use in your own programming and to share with district and school partners.</li><li>• Guide partners to use this resource to find evidence-based programs to implement in their schools.</li></ul>
<a href="#">3.c Action planning tool</a>		<ul style="list-style-type: none"><li>• Use this tool to map out the social-emotional wellness topics you plan to address and the PD, TA, and other activities you plan to deliver in the coming school year.</li><li>• Introduce this tool to district and school partners to map out the social-emotional wellness supports they will deliver.</li></ul>

### Resource types

-  **Tools:** Interactive tables, checklists, and worksheets that are designed to be printed and filled out by hand or completed by typing into this document.
-  **Informational resources:** Easy-to-read tip sheets and summaries designed as reference documents or materials to be repurposed for PD and TA activities.

## Resource 3a. Goal-setting tool

 <b>IU Social-Emotional Wellness Leads</b>	 <b>District and school partners</b>
Set your own S.M.A.R.T.I.E. goals for the quality and reach of your social-emotional wellness supports.	Guide partners to write S.M.A.R.T.I.E. goals for improving student and staff social-emotional wellness.

### ***S.M.A.R.T.I.E. goals are...***

- ✓ **Strategic** – reflect an important dimension of what your organization seeks to accomplish (programmatic or capacity-building needs, including how needs may vary depending on student characteristics).
- ✓ **Measurable** – include standards by which reasonable people can agree on whether the goal has been met (by numbers or defined qualities).
- ✓ **Ambitious** – challenging enough that achievement would mean significant progress; a “stretch” for the organization.
- ✓ **Realistic** – not so challenging as to indicate lack of thought about resources or execution; possible to track and worth the time and energy to do so.
- ✓ **Time-bound** – include a clear deadline.
- ✓ **Inclusive** – bring traditionally excluded individuals or groups into processes, activities, and decisions.
- ✓ **Equitable** – include an element of fairness or justice that seeks to promote equity. For more information on how to define equity and inclusion, you can reference [PDE’s Glossary of Equity, Inclusion and Belonging Terms for Pennsylvania Learning Environments](#).

PDE OSS recommends you use the S.M.A.R.T.I.E. framework to approach your goal setting.



### ***Example S.M.A.R.T.I.E goals***

Goal	Measure of whether goal was met
District partners who participate in my PD will identify one social-emotional wellness data source they plan to use to explore their community’s social-emotional wellness needs.	Participant survey results at end of spring PD show that 100 percent of participants identified a data source.
By the end of the school year, I will engage with at least one staff member from 75 percent of the districts in my IU, including at least one district I have not engaged with before.	By the end of the school year, I have logged interactions with at least 75 percent of districts in the monitoring tool.
I will use consistent, accessible language to describe social-emotional wellness topics in all PD sessions this year.	On survey results or in informal check-ins, at least 75 percent of PD participants indicate the sessions were clear or very clear.

*Record your own S.M.A.R.T.I.E goals*

Goal	Measure of whether goal has been met

### Resource 3.b Summary of evidence-based resource centers

 <b>IU Social-Emotional Wellness Leads</b>	 <b>District and school partners</b>
Identify evidence-based strategies and materials to use in your own programming and to share with district and school partners.	Guide partners to identify evidence-based programs to implement in their schools.

#### *Evidence-based resource centers*

##### **Pennsylvania-specific resource center**

Acronym	Name	Description	Link
<b>ERC</b>	Pennsylvania Evidence Resource Center	The ERC aims to help Pennsylvania's school communities thoughtfully apply high-quality, relevant research to their own settings. Explore this resource center to identify evidence-based strategies, categorized by setting, outcome of interest, and strength of research evidence.	<a href="https://evidenceforpa.org">Pennsylvania Evidence Resource Center evidenceforpa.org</a>

##### **National resource centers**

Acronym	Name	Description	Link
<b>CASEL</b>	Collaborative for Academic, Social, and Emotional Learning	CASEL is a nonprofit, nonpartisan organization focused on social and emotional learning (SEL) evaluation and programming. Explore CASEL's website for SEL frameworks and implementation resources.	<a href="https://casel.org">Advancing Social and Emotional Learning - CASEL</a>
<b>PBIS</b>	Center on Positive Behavioral Interventions and Supports	PBIS works to improve the capacity of state education agencies, local education agencies, and schools to establish, scale up, and sustain the PBIS framework to promote the well-being of all students. Explore PBIS's website for blueprints, examples, and assessments related to a variety of social-emotional wellness topics.	<a href="https://pbis.org">Center on PBIS</a>
<b>REL</b>	Regional Educational Laboratories	The ten Regional Educational Laboratories (RELs) partner with educators and policymakers nationwide to help generate and apply evidence, with the goal of improving learner outcomes. REL Mid-Atlantic developed this guide in partnership with PDE. Use the <a href="#">search feature on the REL website</a> to find resources on social-emotional wellness, school safety, and other topics.	<a href="#">REL program</a>
<b>SHAPE</b>	School Health Assessment and Performance Evaluation System	SHAPE has tools for teams to improve school mental health programming and sustainability in schools, districts, and states. Resources include school mental health quality assessment, screening, and assessment measures. Some resources require access through a paid account.	<a href="https://theshapesystem.com">SHAPE – School Health Assessment and Performance Evaluation (theshapesystem.com)</a>



Acronym	Name	Description	Link
WWC	What Works Clearinghouse	The What Works Clearinghouse is an education research hub run by the Institute of Education Sciences within the U.S. Department of Education. Search the WWC website for practice guides (which summarize evidence-based recommendations for educators) and intervention reports (which summarize the research evidence for a given program or practice) by keyword, topic, and grade level.	<a href="https://www.ies.ed.gov/wwc/">WWC   Find What Works! (ed.gov)</a>

**Tip: Consider publications that summarize evidence-based practices.**



Government agencies and other organizations may publish resources that describe multiple evidence-based practices on a specific topic. For example, the CDC released a [Promoting Mental Health and Well-Being in Schools Action Guide](#) that covers six evidence-based strategies and specific approaches for implementation that may be relevant for school and district partners.

**Tips for using evidence-based resource centers to find strategies relevant to your needs and school context**

Considerations for your search	What to look for
<b>Search terms</b>	<p>Use search terms that are relevant to the aspects of social-emotional wellness you hope to address. You can search by topic (e.g., social-emotional learning) or by specific student or staff outcomes (e.g., self-awareness). Example search terms include:</p> <ul style="list-style-type: none"> <li>• Mental health</li> <li>• Behavioral health</li> <li>• Prevention programs</li> <li>• Social-emotional learning</li> <li>• Social-emotional wellness</li> <li>• Equitable learning environments</li> <li>• Trauma-informed learning environments</li> <li>• School climate</li> <li>• Equity, inclusion, and belonging</li> <li>• Multi-tiered systems of support</li> <li>• Responsible decision-making</li> <li>• Resiliency and self-efficacy</li> <li>• Self-awareness and self-management</li> <li>• Establishing and maintaining relationships</li> <li>• Teaching efficacy*</li> <li>• Opportunities for professional learning and growth*</li> <li>• Professional well-being and job satisfaction*</li> <li>• Connectedness and engagement</li> <li>• Supportive interpersonal relationships</li> <li>• Support for learning and development</li> <li>• Physical and psychological safety</li> <li>• Social inclusion</li> </ul>
<b>Level of evidence</b>	<p>Evidence-based resource centers like the Pennsylvania Evidence Resource Center (ERC) and the national What Works Clearinghouse (WWC) may assign an <i>evidence tier</i> or <i>level of evidence</i> to a given strategy or research finding. Use the evidence tiers to understand the strength of evidence supporting a program or practice. You can feel most confident in the effectiveness of strategies supported by strong evidence.</p> <ul style="list-style-type: none"> <li>• Tier 1: Strong evidence.</li> <li>• Tier 2: Moderate evidence.</li> <li>• Tier 3: Promising evidence.</li> <li>• Tier 4: Demonstrates a rationale.</li> </ul> <p>For more information, see the <a href="#">ESSA Tiers of Evidence</a> and <a href="#">What Works Clearinghouse</a>.</p>
<b>Relevant communities</b>	<p>Identify strategies with evidence of effectiveness for students and communities like yours. You may include search terms related to your district or school setting, grade span, and specific groups of students in your community. For example:</p> <ul style="list-style-type: none"> <li>• School setting: Urban, suburban, rural, online, charter.</li> <li>• Grade span: Elementary school, middle school, high school, K–6.</li> <li>• Student groups: English learners, students from low-income communities, students with disabilities.</li> </ul>

\*Not all resource centers will include resources to improve staff social-emotional wellness.



### Resource 3.c Action planning tool

 <b>IU Social-Emotional Wellness Leads</b>	 <b>District and school partners</b>
Map out the social-emotional wellness topics you plan to address and the PD, TA, and other activities you plan to deliver in the coming school year.	Help partners map out the social-emotional wellness supports they will deliver.




**Action 1: Describe a topic or need you plan to address and your goals for addressing this need.**

#### Tip

Complete Actions 1 and 2 of this action planning tool for each of the topics or needs you plan to address.

Action planning step	Description	Response
 <b>Discover</b>	<p>Describe the need or topic you are addressing. Consider highest priority needs (see <a href="#">Resource 2.d</a>).</p> <p><i>Example: Extremely high Tier 3 mental health referrals for high school students (20 percent of students) overloading staff capacity.</i></p>	
 <b>Define</b>	<p>What would it look like if your supports were successful in addressing this need? Consider relevant S.M.A.R.T.I.E. goals (see <a href="#">Resource 3.a</a>) and other outcomes.</p> <p><i>Example: By the end of the school year, district partners identify at least one Tier 1 strategy they can implement to proactively promote student wellness and reduce number of students needing referrals.</i></p>	

**Action 2: To meet your goals, identify one or more specific strategies and map out a plan for carrying out each strategy.**

 <p><b>Ideate</b> What are the ways you can approach this need? Apply evidence-based strategies (see <a href="#">Resource 3.b</a>).</p>	 <p><b>Plan and Initiate</b> What steps do you need to take to put these ideas into action? What is your timeline?</p>	 <p><b>Reflect</b> How will you reflect on and monitor your plan?</p>
<p><b>Example: PD on identifying appropriate Tier 1 strategies (for example, <a href="#">Learning to BREATHE</a>).</b></p>	<p><i>Draft PD description (October). Publicize PD (October through January). Draft materials, including feedback survey (end of January). Follow up with attendees (February). Deliver PD (March).</i></p>	<p><i>December: Mid-way check-in on materials development and participant list.</i></p> <p><i>March: Reflect on successes and lessons learned, including from feedback survey.</i></p>



### **Ideate**

**What are the ways you can approach this need? Apply evidence-based strategies (see [Resource 3.b](#)).**



### **Plan and Initiate**

**What steps do you need to take to put these ideas into action?  
What is your timeline?**



### **Reflect**

**How will you reflect on and monitor your plan?**


# Step 4: Implement the plan

This step helps you effectively carry out your plans. Consider using these resources throughout the school year as you deliver supports.





## Key actions

- ✓ **Communicate intentionally** about social-emotional wellness activities, considering the needs of your district or school audience.
- ✓ **Prioritize accessibility and engagement** when delivering social-emotional wellness supports.



## Resources

Resource	Type	Examples of how you can use this resource
<a href="#">4.a Communications planning matrix</a>		<ul style="list-style-type: none"><li>• Use this template to identify the communications methods and messages you will use to advertise your PD and TA offerings, share social-emotional wellness resources, and build buy-in among different partners.</li></ul>
<a href="#">4.b Checklist for delivering engaging, accessible supports</a>		<ul style="list-style-type: none"><li>• Use this checklist to make sure you have planned social-emotional wellness activities, such as PD sessions, that are accessible, engaging, and high quality and that center equity.</li></ul>

## Resource types

-  **Tools:** Interactive tables, checklists, and worksheets that are designed to be printed and filled out by hand or completed by typing into this document.
-  **Informational resources:** Easy-to-read tip sheets and summaries designed as reference documents or materials to be repurposed for PD and TA activities.

## Resource 4.a Communications planning matrix

 <b>IU Social-Emotional Wellness Leads</b>	 <b>District and school partners</b>
Plan your communications with the intent of fostering purposeful engagement with key audiences. Use this tool to identify specific methods and messages for advertising your PD and TA offerings, sharing resources, and building buy-in.	Help partners adapt this tool to communicate intentionally with their district and school audiences.

### *Communications planning matrix*

<b>Audience:</b> Who are you communicating with?	<b>Purpose and messaging:</b> Why are you communicating with your audience? What messages do you wish to convey?	<b>Communications channels:</b> What channels are you using to communicate with your audience?	<b>Frequency and timeline:</b> How often are you communicating with your audience? What is your timeline?
<b>Superintendents</b>			
<b>District administrators</b>			
<b>School leaders</b>			
<b>Teachers</b>			
<b>School-based mental health professionals</b>			



<b>Audience:</b> Who are you communicating with?	<b>Purpose and messaging:</b> Why are you communicating with your audience? What messages do you wish to convey?	<b>Communications channels:</b> What channels are you using to communicate with your audience?	<b>Frequency and timeline:</b> How often are you communicating with your audience? What is your timeline?
<b>Families and communities</b>			
<b>Students</b>			
<b>School boards</b>			



**Tip: Consider a full toolbox of communications channels in your planning.**

- Channels include regular newsletters, standalone eblast, agenda items, Facebook, Instagram, X, TikTok, Pinterest, podcast, website, blog post, personal outreach, flyers, snail mail, and cross-promotion with other organizations.
- Don't forget to explore which communications channels work best for each of your audiences. You will approach communicating with teachers differently from communicating with school boards.

**Tip: Think about HOW you communicate your messages.**

- Be sure to include the "what's in it for me" for your audience, appealing to the value and benefit of the activity, such as the specific challenge you are helping them solve or how you will make their job more efficient through an activity.
- Be mindful of the timing when sending your communications, avoiding particularly busy times of the school year.
- Consider an approach that breaks up your content, giving your audiences smaller "bites" more frequently, leading toward their full engagement in your activities and services.

## Resource 4.b Checklist for delivering engaging and accessible supports

 <b>IU Social-Emotional Wellness Leads</b>	 <b>District and school partners</b>
Check that you have taken key steps to ensure that your PD sessions are accessible, engaging, high quality, and center equity.	Help partners apply this checklist when planning social-emotional wellness activities for their staff.

### **Accessibility**

- ✓ Sessions are scheduled at convenient times for participants.
- ✓ Sessions include a mix of learning activities - for example, presentations, discussions, and independent worktime - to support diverse learning needs.
- ✓ Materials define key terms (see suggested explanations in [Resource 1.c](#)) and provide enough context that participants who are brand new to the topic can still engage.
- ✓ Materials use plain language, clear color contrasts, legible font, and helpful images and graphics.

### **Engagement**

- ✓ Sessions are interactive and collaborative, including opportunities for reflection, discussion, and feedback.
- ✓ Sessions center on topics that are relevant to the social-emotional wellness needs and challenges of participants.
- ✓ Session activities promote application of concepts to real-world scenarios.
- ✓ Session activities highlight clear concepts and takeaways.

### **Quality**

- ✓ Sessions introduce and recommend evidence-based strategies and practices (see tips for identifying evidence-based strategies in [Resource 3.b](#)).
- ✓ Session activities are designed intentionally to meet learning objectives for the session.
- ✓ Session materials are drafted, reviewed, and revised, and are free from error.

### **Equity**

- ✓ Sessions discuss equity considerations for specific topics and introduce equity, inclusion, and belonging and trauma-informed principles.
- ✓ Session activities use examples and content inclusive of diverse student and staff identities.

***Explore additional tips to increase accessibility and engagement:***

- [PDE's Establish Healthy System Conditions resource page](#) links to resources with guidance for engaging staff effectively.
- [WISE's Compassion Resilience Toolkit For Schools](#) provides strategies for maintaining a compassionate presence with partners.
- [Stanford's d.school Design Thinking Bootcamp guide](#) and [Bellwether's Lost by Design: Designing From the Margins Toolkit](#) describe specific ways to incorporate collaborative approaches.
- [Facilitating Power's Spectrum of Family and Community Engagement for Educational Equity guide](#) provides language and frameworks for engaging with school community members as partners.

***Explore additional tips for centering equity:***

- [PDE's Equitable Practices Hub](#) provides numerous resources to deliver supports aligned to equitable education principles.
- [PDE's Dictionary of Terms Related to Trauma-Informed Approaches in Schools](#) provides language you can use to introduce trauma-informed practices and related concepts.
- [PDE's Glossary of Equity, Inclusion and Belonging \(EIB\) Terms](#) provides language you can apply when discussing EIB concepts.
- [CASEL's Reunite, Renew, and Thrive guide](#) provides resources for centering relationships and building on community assets.

## Step 5: Monitor the plan



This step helps you determine if you have been successful. Consider using these resources throughout the school year as you deliver supports.





### Key actions

- ✓ **Collect data** on district and school experiences to understand what’s working and how you can improve to reach your goals.
- ✓ **Record activities** to track district and school partner engagement with specific PD and TA offerings.



### Resources

Resource	Type	Examples of how you can use this resource
<a href="#">5.a Strategies for gathering feedback</a>		<ul style="list-style-type: none"><li>• Apply these strategies to gather feedback from district and school partners on the content and quality of the PD and TA supports you have offered.</li><li>• Guide district and school partners to repurpose these strategies to learn about educator experiences with specific social-emotional wellness supports.</li></ul>
<a href="#">5.b Monitoring tool</a>		<ul style="list-style-type: none"><li>• Keep a record of the PD and TA activities you have delivered, including the attendees and focus of each activity.</li></ul>

### Resource types

-  **Tools:** Interactive tables, checklists, and worksheets that are designed to be printed and filled out by hand or completed by typing into this document.
-  **Informational resources:** Easy-to-read tip sheets and summaries designed as reference documents or materials to be repurposed for PD and TA activities.

## Resource 5.a Strategies for gathering feedback

 <b>IU Social-Emotional Wellness Leads</b>	 <b>District and school partners</b>
Assess whether your supports meet your participants' needs and identify opportunities to improve your sessions.	Assess whether PD sessions are accessible, engaging, high quality, and meet the needs of your staff.

**Use one or more of the following strategies to gather feedback from partners on the content, quality, applicability, and impacts of your supports.**

### Surveys

Description	Gather anonymous feedback using paper or electronic surveys
<b>Tips</b>	<ul style="list-style-type: none"> <li>• Leave time at the end of a PD session to administer feedback surveys.</li> <li>• Include open-ended and multiple-choice questions.</li> <li>• Keep surveys less than five minutes to complete.</li> </ul>
<b>Example questions</b>	<ul style="list-style-type: none"> <li>• <b>Content:</b> Did this activity provide the knowledge or skills necessary to meet the request? Was the ask adequately answered?</li> <li>• <b>Applicability:</b> How might you apply the knowledge and skills you learned today?</li> <li>• <b>Overall satisfaction:</b> Would you recommend this support to a colleague in a similar position? Why or why not?</li> <li>• <b>Impact:</b> Which of these supports listed below would be helpful for your district? Select all that apply.</li> </ul>

### Informal conversations

Description	Discuss feedback and next steps with leaders and participants
<b>Tips</b>	<ul style="list-style-type: none"> <li>• Hold a short meeting for more detailed discussions on feedback, including opportunities and next steps.</li> <li>• Request additional feedback from leaders over email, phone, or video call.</li> <li>• Gather informal feedback immediately after a PD session.</li> </ul>
<b>Example questions</b>	<ul style="list-style-type: none"> <li>• To what extent did this support respond to needs in your district?</li> <li>• What aspects of this support were most and least relevant to your work?</li> <li>• How might you apply the knowledge and skills?</li> <li>• What are your next steps after engaging with this support?</li> </ul>

**Tip: Use a combination of open-ended and multiple-choice questions.**

You can convert many of the open-ended questions in this resource into multiple-choice questions by using multiple-choice response scales such as the following:

**Example 1:** To what extent did this support respond or relate to a social-emotional wellness need in your district?

- Not at all
- To a small extent
- To a moderate extent
- To a large extent
- To a very large extent



**Example 2:** How likely would you be to recommend this support to a colleague in a similar position?







- Not at all likely
- Somewhat likely
- Very likely

**Example 3:** How might you apply the information you learned in today's session?

- Open-ended response

## Resource 5.b. Monitoring tool

 <b>IU Social-Emotional Wellness Leads</b>	 <b>District and school partners</b>
Track your efforts across districts and schools. Assess engagement across your region, highest-leverage supports and topics, and progress toward your goals.	Track engagement and interest across the schools in your district. Identify the supports and topics that garner the most interest from staff. Assess progress toward your goals.

 <b>Activity</b> What was the activity? Was this PD or TA?	 <b>Engagement</b> Who attended or engaged? Which schools or districts?	 <b>Concepts</b> What were the key take-aways? What materials or resources did you share?	 <b>Define</b> Recall the goal.	 <b>Monitor</b> What data did you gather?	 <b>Reflect</b> What went well? What could you do differently next time?
<i>Example: PD on Tier 1 strategies</i>	<i>Districts A, C, and F</i>	<i>Tier 1 strategies for the classroom <a href="#">Learning to BREATHE</a></i>	<i>By the end of the school year, district partners identify at least one Tier 1 strategy they can implement to proactively promote student wellness.</i>	<i>Teacher feedback survey</i>	<i>Positive feedback from teachers. Many requests for more group discussion and practice next time.</i>

# Step 6: Adjust course

This step helps you reflect and improve upon your approach. Consider using these resources throughout the school year, particularly as you look ahead to future planning.



## Key actions

- ✓ **Reflect on progress**, including whether you met your goals, highlights from the year, and lessons learned.
- ✓ **Prepare for the next planning cycle** by applying lessons learned.



## Resources

Resource	Type	Examples of how you can use this resource
<a href="#">6.a Lessons learned reflection guide</a>		<ul style="list-style-type: none"><li>• Use these questions to reflect—on your own or with other staff and partners—on what went well this school year and what challenges you faced.</li><li>• During TA, ask these questions to help district and school partners reflect on their bright spots and challenges.</li></ul>
<a href="#">6.b Applying lessons learned tool</a>		<ul style="list-style-type: none"><li>• Complete this worksheet to reflect on progress toward goals and identify specific actions you can take in future years to build on past successes and lessons learned.</li></ul>

## Resource types

- Tools:** Interactive tables, checklists, and worksheets that are designed to be printed and filled out by hand or completed by typing into this document.
- Informational resources:** Easy-to-read tip sheets and summaries designed as reference documents or materials to be repurposed for PD and TA activities.

## Resource 6.a Lessons learned reflection guide

 <b>IU Social-Emotional Wellness Leads</b>	 <b>District and school partners</b>
Reflect on what went well this school year when planning and delivering supports and challenges you faced.	Ask partners these questions to help them identify bright spots and challenges from this school year.

### ***Planning and delivering supports***

- Which district and school partners were most engaged with your supports? Which were least engaged?
- To what extent were your supports timely, relevant, and accessible for participants?
- What are the different ways you communicated with partners to support their engagement?
- What partnerships or communities contributed to your work? Which resources did you use?
- How did you and partners use data to understand social-emotional wellness needs? Which data sources were most or least useful? Why?
- How did you and partners apply evidence-based strategies to address social-emotional wellness needs?
- To what extent did you feel like you had the time and support to carry out this work? Did your workload feel just right, not enough, or too much?

### ***Highlights***



- When did you feel most successful in your efforts to promote social-emotional wellness this year? What did that success look and feel like?
- Which supports were the most well-received? How were you able to address partner needs?
- When did you feel most confident in the quality or impact of your supports? What do you think contributed to the high quality or impact?
- How did you address challenges that came up this year? When did you feel most successful addressing challenges?

### ***Challenges***

- When did you feel least successful in your efforts to promote social-emotional wellness this year? What were your largest concerns or barriers?
- What challenges did you face addressing partner needs? Engaging partners?
- What surprised you this year? What aspects of your role or supports played out differently from what you'd expected or planned?
- Looking back, what do you wish you had known last year?



Resource 6.b Applying lessons learned tool

 <b>IU Social-Emotional Wellness Leads</b>	 <b>District and school partners</b>
Reflect on progress toward goals and identify specific actions you can take in future years to build on past successes and lessons learned.	Guide partners to reflect on their progress toward goals and adjust their approach in future school years based on lessons learned.

**Action 1: Revisit the S.M.A.R.T.I.E. goals you identified in [Resource 3.a](#) and the monitoring data you collected in [Resource 5.b](#) to reflect on progress toward your goals.**

Goal	Did you meet your goal? If not, what progress did you make?	What data or observations do you have to measure your progress?	What approaches or factors supported your success? What barriers did you face?

**Action 2: Looking ahead to next year, identify specific actions you will take to build on this year's successes and apply lessons learned.**

What were your three biggest successes this year?	How can you build on these successes next year?
Consider PD or TA that was well-received, ways you effectively addressed partner needs, and strategies you used to engage partners and build buy-in.	How can you continue to use or increase your use of effective strategies? How can you expand or replicate well-received supports?

**Tip: As you start planning for next year, revisit resources in this guide with your reflections in mind.**

- Redo the capacity self-assessment to see how your capacity has changed over the course of the school year ([Resource 1.a](#)).
- Update the information you've gathered about partners' perceptions of social-emotional wellness programming and how to speak their language ([Resource 1.b](#)).
- Revisit your approaches to engaging different audiences ([Resource 1.d](#)).
- Add more detail about the needs and priorities of your partners ([Resource 2.d](#)).
- Update your goals for next year based on the progress you made this year ([Resource 3.a](#)).
- Keep your reflections in mind as you begin action planning for next year ([Resource 3.c](#)).