

## **Initiative Implementation Process: Guidance Document**

**Directions:** At the end of each chapter, you received action steps and reproducibles to use in your new initiative implementation process. All the distinct actions are compiled in the chart to illustrate the entire process. Whether you prefer to engage in the process chapter by chapter or use the following overview as a guidance document for your team, this ten-stage process is intended to help you attain your school or district’s goals.

<b>Stages</b>	<b>Action Planning</b>	<b>Notes or Evidence</b>
Introduction	<ul style="list-style-type: none"> <li><input type="checkbox"/> Define your new initiative in a few sentences (elevator pitch).</li> <li><input type="checkbox"/> Determine whether it is externally or internally initiated and how that may affect your approach.</li> <li><input type="checkbox"/> Examine and call out the three barrier levels that may exist in your school or district related to this implementation.</li> </ul>	
Stage 1: Research and Vet the Idea	<ul style="list-style-type: none"> <li><input type="checkbox"/> Carefully select your leadership team members.</li> <li><input type="checkbox"/> Intentionally embed the seven effective leadership practices in your team training.</li> <li><input type="checkbox"/> Complete the six steps in the research and vetting process using the “Initiative Vetting Notetaking Tool” reproducible (page 19).</li> </ul>	
Stage 2: Pitch the Proposal	<ul style="list-style-type: none"> <li><input type="checkbox"/> Conduct the tuning protocol (see figure 2.1, page 22).</li> <li><input type="checkbox"/> Complete the “Protocol-Planning Template” reproducible (page 34).</li> <li><input type="checkbox"/> Follow up on the suggestions offered at the end of the “Protocol-Planning Template” reproducible.</li> </ul>	
Stage 3: Determine Priorities	<ul style="list-style-type: none"> <li><input type="checkbox"/> Complete the “Initiative Prioritization Rubric” reproducible (page 52).</li> <li><input type="checkbox"/> Complete the “District Plans Crosswalk” reproducible (page 55).</li> <li><input type="checkbox"/> Use the “Cost-Benefit Analysis” reproducible (page 56) to develop and complete a cost-to-impact matrix for pending initiatives (see figures 3.4 and 3.5, page 50, as models).</li> </ul>	
Stage 4: Design the Proof of Concept, Prototype, and Pilot	<ul style="list-style-type: none"> <li><input type="checkbox"/> Design the proof of concept, prototype, and pilot framework (see figure 4.1, page 58).</li> <li><input type="checkbox"/> Complete the “Four Critical Questions for the Pilot” reproducible (page 66).</li> <li><input type="checkbox"/> Complete the “Mid-Pilot Process Check” reproducible (page 67).</li> </ul>	
Stage 5: Build Stakeholder Engagement	<ul style="list-style-type: none"> <li><input type="checkbox"/> Define your stakeholder groups by completing the “Stakeholder Groups” reproducible (page 80).</li> <li><input type="checkbox"/> Plan multi-pronged outreach strategies.</li> <li><input type="checkbox"/> Test Maslow’s hierarchy of needs against your chosen engagement strategies using the “Maslow’s Hierarchy of Needs Analysis” reproducible (page 83).</li> </ul>	

## REPRODUCIBLE

Stages	Action Planning	Notes or Evidence
Stage 6: Gather and Analyze Data	<ul style="list-style-type: none"> <li><input type="checkbox"/> Review components for survey design and focus groups, and then design your own using the “Survey Mapping Tool” and “Focus Group Mapping Tool” reproducibles (pages 97–98).</li> <li><input type="checkbox"/> Determine which passive data sources may supplement your research goals (see figure 6.3, page 94).</li> <li><input type="checkbox"/> Complete the “Data Analysis Form” reproducible (page 99).</li> </ul>	
Stage 7: Make a Decision	<ul style="list-style-type: none"> <li><input type="checkbox"/> During the leader’s presentation, use the “Questions and Commitments Notetaking Tool” reproducible (page 110) to note any questions or concerns. See the completed sample in figure 7.1 (page 104).</li> <li><input type="checkbox"/> After the presentation, have each team member complete the “Decision-Making Rubric” and “Team Decision-Making Assessment” reproducibles (pages 111–112).</li> <li><input type="checkbox"/> Review the “Criteria for Green-Lighting, Yellow-Lighting, or Red-Lighting an Initiative” reproducible (page 114), and craft specific definitions to your own initiative.</li> </ul>	
Stage 8: Plan and Deliver Professional Development	<ul style="list-style-type: none"> <li><input type="checkbox"/> Map out your long-term plan for cohesive, differentiated, and ongoing professional development in the first six months of implementation (see figure 8.2, page 122).</li> <li><input type="checkbox"/> Plan for your initiative’s professional development experiences using the “Professional Development Design Worksheet” reproducible (page 125).</li> <li><input type="checkbox"/> Use the “Agenda-Planning Form” reproducible (page 128) to ensure the three Rs (relevance, rigor, and relationships) are well-balanced and attended to, as demonstrated in figure 8.1 (page 120).</li> </ul>	
Stage 9: Implement the Initiative	<ul style="list-style-type: none"> <li><input type="checkbox"/> Complete and apply the “Self-Assessment and Rating Scale Continuum” reproducible (page 140) to the initiative during the early part of this stage.</li> <li><input type="checkbox"/> When conducting observations of the implementation in action, adapt the “Implementation Observation Tool” reproducible (page 141) to fit your particular circumstances.</li> <li><input type="checkbox"/> Use the “Stakeholder Representative Assignments” reproducible (page 142) to assign tasks to stakeholders (see figure 9.2, page 137, for an example).</li> </ul>	
Stage 10: Provide Ongoing Support	<ul style="list-style-type: none"> <li><input type="checkbox"/> Use the “Steering Guide for Monitoring Progress” reproducible (page 153) to flesh out the details for your short-term, mid-term, and long-term initiative implementation plans.</li> <li><input type="checkbox"/> Use the “Initiative Assessment Tool” reproducible (page 154) to evaluate your existing initiatives to ascertain whether they should remain in play or be eliminated in the future.</li> </ul>	