Planning Guide: Installing a Universal Screening Tool  
*This guide is to be used by district leadership teams through the exploration and installation phases of adopting a universal screening tool.*

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| **What** | **Activities that will help during this phase** |
| Exploration  *Choose a Screening Tool* | * Establish *district* universal screening committee consisting of building level administrators, student support personnel, teachers, family and community members. * Outline your existing process for matching students to interventions. What sources of information are you currently using? What is missing? * Define why you are you considering a universal screening tool (e.g. how will the screener address student needs). How do you know this is a need? (e.g. community data, visits to nurse) * Define what critical skills/behaviors will be assessed during screening * Define who will be assessed, why, when, how often and how * Explore screening tools (*use attached protocol for review*) * Develop a method to share information about the need, value, and logistics of universal screener adoption with stakeholders   *Use the information from above activities to answer the following critical questions:*  1. Why has your team decided to use a screening tool?  2. What is the screening tool that your team has chosen and why?  3. Who will be screened, why, when, how often and how?  4. What is your plan to share information/establish buy-in about the screener with stakeholders at the building level? |
| Installation  *Prepare to implement* | * Determine the readiness criteria for schools to implement universal screeners (*e.g. has an existing tier 2 team that uses databased decision rules and is ready to start meeting student needs as close to screening day as possible*) * Determine who will oversee the screening procedures at the district and school level * Develop a system for gaining consent * Establish team operating procedures to review data   + Identify who is on the team and their role in supporting the process   + Define how the team proposes to generate reports and store the data * Develop a protocol for data based decision making at the individual student and systems level   + Establish data driven decisions to match students to appropriate levels of support   + Ensure there are foundational interventions available (e.g. CICO) or a process to create appropriate interventions at a systems level * Develop a protocol for sharing results with other teams, staff and families * Develop professional development materials (for administrators, testing coordinators, and staff) * Create a calendar of critical dates for training/coaching staff, administrators and testing coordinators   *Use the information from above activities to answer the following critical questions:*  1. What school level readiness criteria is required to adopt (the district approved) universal screener?  2. What are your team operating procedures for instructional decision making (for both individual students and the tiered system at large)?  3. What is your professional development plan for teachers, testing coordinators and MTSS teams? |

Universal Screening Tool Exploration Worksheet  
*This tool is to be used by leadership teams to evaluate the appropriateness of installing a specific universal screening tool within their district.*

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| Assessment Name: | |
| General Features | What grades are/can be assessed?  Is the measure designed to assess students multiple times per year?  What critical skills/behaviors are assessed?  What options are available to store data and generate reports? |
| Fit with Current Initiatives | Do reports allow for efficient analysis of results at the district, building, grade, class, and individual level in order to:   * Determine percentage who present low, some and high risk * Determine what skills will need to be further supported at Tier 1 * Determine if there is a difference between subgroups * Progress monitor individual and group response to intervention/prevention efforts |
| Evidence | List any available technical reports, research articles, and reviews of the assessment’s technical adequacy  Is there relevance to the school’s demographics?  What technical assistance/implementation support are available (e.g. webinars, individualized support via phone, online manuals etc.)?  Identify districts/states that have had success with this assessment in an MTSS framework; what can be learned? |
| Resources and Supports | ***Time***: how long does it take to prepare for testing (organize materials, space, etc.)? How long does it take to administer? How long does it take to score?  ***Cost***: What is the cost of the assessment materials and/or data system per student, per year? What is the cost of startup materials? What will it cost to train staff to administer? What technology is needed to administer/score?  ***Training/Coaching***: what type of training is necessary for administration/scoring? What type of training is necessary on data interpretation?  ***People***:  Who will need to be involved in initial and on-going training (as trainer(s) and participants)? Who will need to be involved in the universal screening process (e.g. preparation, assessors, coordination, data entry, report generation)? Who will need to be involved in coaching the effective use of universal screening data for instructional decision-making? |
| Capacity to Implement | Can we provide the resources and support necessary to sustain appropriate use of this assessment (time, cost, training/coaching, people)? |