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## **Benchmark Checklist for Monitoring and Reviewing Progress in Developing a Comprehensive System to Address Barriers to Learning and Teaching**

The checklist on the following pages is designed to aid those involved in the process of restructuring education support programs and developing a Learning Supports (Enabling) Component.

This tool was developed as a formative evaluation instrument for use by Steering Groups, Organization Facilitators, and other change agents. It aids in focusing problem solving discussions and planning next steps.

*The items should be modified to fit local strategic and action plans*

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### **ABOUT THE CENTER FOR MENTAL HEALTH IN SCHOOLS at UCLA**

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For more on this, contact us by email at [smhp@ucla.edu](mailto:smhp@ucla.edu) or call 310/825-3634 (toll free – 866/846-4843) or write Center for Mental Health in Schools, Dept. of Psychology, UCLA, Box 951563, Los Angeles, CA 90095-1563.



Site Name:	Date started	Date Completed if applies	Current Status
<b>I. ORIENTATION AND CREATING READINESS</b>			
<p>A. Establishment of a District Steering Group (“champions”) to facilitate development of the Component  Steering Group members identified  Names:                      Position:</p>			
<p>B. Leadership and systemic change training for steering group members</p>			
<p>C. Orienting district stakeholders – initial contacts made with key stakeholders to introduce basic ideas</p>			
<p>(1) “Social marketing” strategies used to introduce basic ideas and relevant research base to key stakeholders  &gt;administrators  &gt;staff  &gt;parent representatives  &gt;business and community stakeholders  &gt;_____</p>			
<p>(2) Opportunities for interchange provided &amp; additional in-depth presentations made to build a critical mass of consensus for systemic changes</p>			
<p>(3) Ongoing evaluation of interest indicates a critical mass of stakeholders are ready to pursue a policy commitment</p>			
<p>(4) Ratification and sponsorship elicited from a critical mass of stakeholders</p>			
<p>D. Establishing Policy Commitment &amp; Framework – (follow-up meetings with district leaders to clarify the dimensions of the work and how to proceed)</p>			
<p>(1) Negotiation of policy commitment and conditions for engagement (e.g., high level policy established and assurance of leadership commitment – learning supports component adopted as one of the primary and essential components of school improvement – on a par with the instructional and management components)</p>			
<p>(2) Policy translated into an inspiring vision, a framework, and a strategic plan that phases in changes using a realistic time line</p>			
<p>(3) Policy translated into appropriate resource allocations (leadership, staff, space, budget, time)</p>			

Site Name:	Date started	Date Completed if applies	Current Status
(4) Incentives for change established (e.g., intrinsically valued outcomes, expectations for success, recognitions, rewards)			
(5) Procedural options established that reflect stakeholder strengths and from which those expected to implement change can select strategies they see as workable			
(6) Infrastructure and processes established for facilitating change efforts			
(7) Establishment of a change agent(s) position			
(8) Change agent(s) identified – indicate name(s)			
(9) Initial capacity-building – essential skills developed among stakeholders to begin implementation			
(10) Benchmarks used to provide feedback on progress and to make necessary improvements in the process for creating readiness			
E. Development of phase-in plan for District			
F. Establishment of Steering Group (“champions) for school to facilitate development of the Component Steering Group members identified Names:                      Position:			
G. Leadership and systemic change training for steering group members			
H. Orienting school stakeholders – initial contacts made with key stakeholders to introduce basic ideas			
(1) “Social marketing” strategies used to introduce basic ideas and relevant research base to key stakeholders >administrators >staff >parent representatives >business and community stakeholders _____			
(2) Opportunities for interchange provided & additional in-depth presentations made to build a critical mass of consensus for systemic changes			
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(10) Benchmarks used to provide feedback on progress and to make necessary improvements in the process for creating readiness			
<b>J. Development of phase-in plan for school</b>			
<b>II. START-UP AND PHASE-IN</b>			
<b>A. Establishment of Steering Group to facilitate development of the Component Steering Group members identified</b> Name:                      Position:			

Site Name:	Date started	Date Completed if applies	Current Status
B. Identification of a site leader (equivalent to the leader for the Instructional Component) Name:                      Position:			
C. Identification of other leaders for the Component Names:                      Position:			
D. Change Agent(s) identified Name:                      Position:			
E. Leadership and systemic change training for all who will be taking a lead in developing the component			
F. Survey of administrator, teacher, and other staff regarding attitudes about new directions			
<b>G. ESTABLISHMENT OF LEARNING SUPPORTS RESOURCE TEAM</b>			
(1) Identification of potential team members			
(2) Recruitment of team members. Name:                      Position:			
(3) Initial team meeting.			
(4) Training for team.			
<b>H. INITIAL MAPPING AND ANALYSIS OF EXISTING RESOURCES</b>			
(1) Initial mapping			
(2) Initial analyses (of needs, gaps, efficacy, coordination)			
(3) Initial plans and steps to improve learning supports (enabling) activity			
(4) initial maps and plans distributed			

Site Name:	Date started	Date Completed if applies	Current Status
<b>I. INITIAL ENHANCEMENT OF SYSTEMS AND ACTIVITY RELATED TO ENABLING</b>			
(1) Analyze, improve, document, and circulate info and recommendations on how to use current systems for >Referral for Emergency Help-Major Services >Triage >Case Management >Crisis Response (e.g., Crisis Team) (e.g., clarify steps, develop flow charts, written descriptions, train personnel, etc.).			
(2) Training for existing teams. >Crisis Team >Student and Family Assistance Team (e.g., Student Study or Guidance Team) >Other (specify)			
<b>J. REFINING INFRASTRUCTURE &amp; PURSUING DEEPER MAPPING AND ANALYSES</b>			
(1) Learning support activity organized into a delineated set of intervention arenas (e.g., six areas)			
(2) Standing work groups developed for each area			
(3) Training of Area work groups Specify Areas:			
(4) Initial mapping and analyses of resources related to each area accomplished			
(5) Each area work group formulates priorities for enhancing activity in own area. Specify Areas:			
(6) Priorities for enhancing learning supports delineated, evaluated, and ranked by Resource Team and plans formulated for pursuing top priorities.			
(7) School infrastructure refined so that learning supports (enabling) component is fully integrated with the instructional and management components			
(8) If relevant, plans formulated to establish a Family and/or Parent Center			

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<b>K. COMPONENT VISIBILITY, COMMUNICATION, &amp; PROBLEM SOLVING</b>			
(1) Ad hoc work groups developed to enhance component visibility, communication, sharing, & problem solving			
(2) All existing programs, services, and resources listed, circulated (e.g., to all staff, parents), and posted (e.g., on key bulletin boards)			
(3) Other steps taken to enhance visibility. (specify)			
(4) Effective <i>communication mechanisms</i> in operation			
(5) Effective <i>problem solving mechanisms</i> in operation			
(6) Effective <i>social marketing mechanisms</i> in operation			
<b>L. OUTREACH TO FILL GAPS &amp; PURSUE ECONOMIES OF SCALE</b>			
Formal collaborative linkages established with other resources in the district (specify)			
Formal collaborative linkages established with other schools in locale (e.g., Resource <i>Council</i> ) (specify)			
Formal collaborative linkages established with community resources (e.g., programs and agencies) (specify)			
<b>M. SYSTEM FOR QUALITY IMPROVEMENT</b>			
Decisions about indicators to be used.			
Members recruited for Quality Improvement Team. Name:                      Position:			
Training of Quality Improvement Team			
Initial Quality Improvement recommendations. Made. Acted upon.			

Site Name	Date Started	Date Completed	Current Status
III. INSTITUTIONALIZATION (maintenance & evolution) & IV. PLANS FOR ONGOING RENEWAL			
<u>A. Indications of planning for maintenance</u>			
(1) <u>policy commitments</u>			
(2) <u>regular budget allocations</u>			
(3) <u>ongoing administrative leadership</u>			
(4) a key facet of school improvement plans			
B. Strategies in use for maintaining momentum/progress.(sustainability) (List most prominent examples)			
C. Strategies in use and future plans for generating renewal (List most prominent examples)			

*An overarching benchmark involves the monitoring of the implementation of evaluation plans.*