

Planning Guide for Social-Emotional Wellness Leads in Intermediate Units

Frameworks, tools, and resources to support a strategic, evidence-based approach to social-emotional wellness programming

The Office for Safe Schools (OSS) in the Pennsylvania Department of Education (PDE) is committed to supporting efforts that foster supportive learning environments and social-emotional wellness in Pennsylvania schools. By working with Intermediate Unit (IU) and district staff, OSS aims to develop and sustain equitable, trauma-informed learning environments that support the well-being of all students and staff.

The Pennsylvania Office for Safe Schools’ social-emotional wellness goal 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.

Purpose of this guide

IU Social-Emotional Wellness Leads play a critical role in planning and delivering social-emotional wellness supports across the commonwealth. This guide is designed to support you to (1) strategically plan, (2) partner with district and school leaders, (3) leverage available resources, and (4) connect with and learn from other IU Social-Emotional Wellness Leads. The tools and resources outlined in this guide align with PDE’s Accelerated Learning framework—an evidence-based approach to planning and continuous improvement efforts.

Guide contents

- [How to use resources in this guide](#) describes the different types of resources and how you can use them to support your work as an IU Social-Emotional Wellness Lead.
- [How to navigate this guide](#) provides tips for accessing resources within the guide’s resource appendix.
- The [resource summary](#) provides a brief description of each resource in the appendix. Resources are organized by which step they support in the Accelerated Learning Framework Cycle of Continuous Improvement.
- The [resource appendix](#) contains over 20 resources to support your planning and delivery of social-emotional wellness supports. There are several resources to support each step in the Accelerated Learning Framework Cycle of Continuous Improvement.

This guide contains resources to support each step of the Accelerated Learning Framework Cycle of Continuous Improvement.



How to use resources in this guide

The resources in this guide are designed for you to use when planning and delivering social-emotional supports. There are three types of resources with different uses:

-  **Tools:** Interactive tables and worksheets you can fill out to organize your planning and document different steps of the planning process.
-  **Informational resources:** Easy-to-read documents with information and guidance related to social-emotional wellness that you can refer to when planning and implementing supports.
-  **Reflection questions:** Lists of questions for self-reflection or to use in conversations with district leaders, other IU staff, and other IU Social-Emotional Wellness leads.

Multiple resources are available for you to carry out each step of the Accelerated Learning Framework Cycle of Continuous Improvement. For example, six different resources are available to [Set the Direction \(step 1\)](#) for your work with districts, and seven different resources are available to [Assess the Social-Emotional Wellness Needs \(step 2\)](#) across districts in your catchment area. Some of the resources are specifically designed for social-emotional wellness programming (see [Resource appendix](#)), whereas others are found in [PDE's Accelerated Learning Planning Template](#).

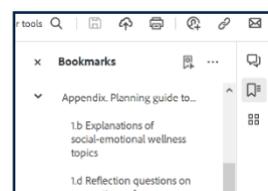
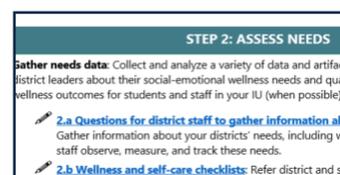
You choose which resources to use in your work. For example, you could select one or more resources from each step in the Continuous Improvement Cycle to use throughout the school year. You can use the resources in order of the steps in the Continuous Improvement Cycle (for example, step 1 resources, then step 2 resources), or use them as needed. You can also adapt resources to suit your needs and the needs of districts in your catchment area. For example, you may use parts of a tool to support your planning, or you may repurpose sections of informational resources to design professional development sessions for groups of districts.

Tip: Adapt the guide and its resources based on the needs of districts in your catchment area.

- From any step, pick and choose the resources that are most helpful for your planning or most applicable for districts in your catchment area.
- Follow the guide step-by-step or focus on select steps.
- Share your questions and reflections with OSS staff and other IU Social-Emotional Wellness Leads.

How to navigate this guide

- To access a specific resource**, click the hyperlinked title of the resource in the [resource summary table](#). All resources found within PDE's Accelerated Learning Planning Template are hyperlinked to an external document, downloadable from PDE's website.
- To navigate back to the resource summary table**, click the  [Click here to return to the resource summary table](#) box at the top right corner of each resource.
- To see a list of all resources and navigate between resources**, click the Bookmarks icon on the far right of your screen. Click the name of the resource or section of the guide you would like to access.



Resource summary

This table describes all the resources in this guide and how they relate to the steps in the Accelerated Learning Framework Cycle of Continuous Improvement. You can consider choosing one or more resources from each step in the Continuous Improvement Cycle to use throughout the school year.

STEP 1: SET THE DIRECTION	
<input checked="" type="checkbox"/>	<p>Build a team: Gather a diverse group of staff and partners who are available and willing to contribute to the planning and implementation of social-emotional supports in your IU.</p> <p> 1.a Planning committee table (Accelerated Learning Template p. 1): Record the names, affiliations, and roles of all staff within your IU who will support this work.</p>
<input checked="" type="checkbox"/>	<p>Establish and communicate the purpose: Define and share the purpose of social-emotional wellness supports in your IU based on statewide commitments and local context.</p> <p> 1.b Explanations of social-emotional wellness topics: Prepare to explain, demystify, and build a common language for discussing social-emotional wellness topics in conversations with district staff, school staff, and community members.</p> <p> 1.c System plan commitments list (Accelerated Learning Template p. 2): Ground your internal planning in these commitments to continuously improve access, quality, and outcomes for all students.</p>
<input checked="" type="checkbox"/>	<p>Reflect on current capacity: Reflect on your IU's existing capacities related to social-emotional wellness supports to identify strengths, challenges, and cross-district patterns.</p> <p> 1.d Reflection questions on perceptions of social-emotional wellness in your IU: Reflect on how social-emotional wellness is currently defined and positioned in your IU. Discuss your responses with other IU Social-Emotional Wellness Leads to identify common perceptions.</p> <p> 1.e IU capacity assessment tool: Systematically identify your IU's current assets and resources related to social-emotional wellness, categorized in four main areas: human, organizational, structural, and material capacity.</p> <p> 1.f District mapping tool: Visualize the extent to which each of the districts in your IU is engaged with and has bought in to the importance of social-emotional wellness work. Group districts with similar involvement to inform needs assessment.</p>
STEP 2: ASSESS NEEDS	
<input checked="" type="checkbox"/>	<p>Gather data on needs: Collect and analyze a variety of data and artifacts, including qualitative information from district leaders about their social-emotional wellness needs and quantitative data on social-emotional wellness outcomes for students and staff in your IU (when possible).</p> <p> 2.a Questions for district staff to gather information about social-emotional wellness needs: Gather information about your districts' needs, including which are most pressing and how district staff observe, measure, and track these needs.</p> <p> 2.b Wellness and self-care checklists (Pennsylvania Training and Technical Assistance Network resource): Refer district and school staff to self-assess overall student and staff wellness and organizational self-care using these resources.</p>

STEP 2: ASSESS NEEDS

	<ul style="list-style-type: none"> 2.c Summary of data sources by social-emotional wellness dimension: Visualize how quantitative data sources map to key dimensions of student social-emotional wellness, staff social-emotional wellness, and safe and supportive learning environments in your IU. 2.d Detailed list of data sources for assessing social-emotional wellness needs: Understand how district staff or you can identify and access strategic quantitative data sources for measuring dimensions of student social-emotional wellness, staff social-emotional wellness, and safe and supportive learning environments. 2.e Data collection table for district needs assessment: Record the information you gather about each district's needs. Where possible, note the information source from which you learned about districts' needs.
<input checked="" type="checkbox"/>	<p>Synthesize needs assessment data: Identify strengths and opportunities for improvement related to social-emotional wellness, supported by data collected on the needs of students and staff in your IU. Use needs assessment data to identify priority areas for supports.</p> <ul style="list-style-type: none"> 2.f Data-supported strengths and challenges table (Accelerated Learning Template p. 3): Record the strengths, challenges, and supporting evidence identified in the data on needs. 2.g District needs synthesis tool: Synthesize information you've gathered about individual districts' needs and reflect on the urgency of each need to identify priority areas for social-emotional wellness supports.

STEP 3: CREATE A PLAN

<input checked="" type="checkbox"/>	<p>Establish goals: For each social-emotional wellness priority area (identified in step 2), establish goals for your delivery of supports and districts' engagement and reported satisfaction with these supports.</p> <ul style="list-style-type: none"> 3.a Guidelines for strong (SMARTIE) goals (Accelerated Learning Template p. 4): Understand how to write goals that are effective in driving your social-emotional wellness work. 3.b Examples of strong goals and interim targets (Resource to be developed): Refine your goals by exploring example goals specific to the delivery and success of social-emotional wellness supports. 3.c Goals and interim targets table (Accelerated Learning Template p. 4–5): Record your goals for supports in each priority area.
<input checked="" type="checkbox"/>	<p>Identify evidence-based supports: For each social-emotional wellness priority area, identify high-leverage strategies that are backed by evidence and fulfill your statement of work.</p> <ul style="list-style-type: none"> 3.d List of evidence-based, social-emotional wellness resource centers: Understand where to access information on relevant evidence-based programs and practices. 3.e Guidance for selecting evidence-based, social-emotional wellness strategies: Understand how to search for and identify programs and practices that fit the needs and contexts of students and staff in your IU. 3.f Statement of work checklist: Consider how the evidence-based supports you've identified in each priority area fulfill your statement of work and identify outstanding statement of work requirements. 3.g Evidence-based strategies and related goals table (Accelerated Learning Template p. 6): Record the evidence-based supports you've selected and map these supports to your social-emotional wellness priority area goals.

STEP 3: CREATE A PLAN



Create an action plan: For each evidence-based support, develop a detailed action plan that includes sequential action steps, indicators of implementation, and a monitoring plan.



3.h Action plan tables (Accelerated Learning Template p. 6–14): For each social-emotional wellness support you plan to deliver, record detailed action steps and the associated materials, person(s), implementation timeline, and monitoring and evaluation plan.



3.i Example of a strong action plan (*Resource to be developed*): Refine your action plan by exploring example plans specific to the delivery and monitoring of social-emotional wellness supports.



3.j Professional learning plan tables (Accelerated Learning Template p. 6–14): For supports that involve professional learning, complete a more detailed plan that includes the professional learning goal(s), audience, and topics.

STEP 4: IMPLEMENT THE PLAN



Communicate the plan: Use intentional communication strategies to ensure the intended audience for your social-emotional wellness supports understands how to access and engage with the supports.



4.a Communication steps and timelines table (Accelerated Learning Template p. 15): Record the strategies you will use to communicate about the supports you plan to deliver.



Ensure accessibility: Ensure that the intended audience for your social-emotional wellness supports can effectively engage with all supports.



4.b Checklist for delivering accessible, high-quality social-emotional wellness supports: Before delivery, check that you've taken the necessary steps (including leveraging existing frameworks and guidance) to ensure the support will be accessible to and engaging for the intended audience.

STEP 5: MONITOR THE PLAN



Monitor implementation: Collect and record information related to your delivery of social-emotional wellness supports, according to your monitoring plan (created in step 3).



5.a List of possible questions to ask district staff to assess the effectiveness of supports:

During or after delivering supports, ask district staff about their overall satisfaction and how they will apply lessons learned to their contexts.



5.b Monitoring social-emotional wellness supports table: For each priority area, record information about the quantity, content, and effectiveness (where possible) of supports you delivered, according to your monitoring plan (created in step 3). For each support, self-reflect on what went well, what was challenging, and what questions or concerns came up for you during delivery.

STEP 6: ADJUST COURSE

Reflect on progress toward goals: Identify the extent to which you met your goals in each priority social-emotional wellness area, and what supported or hindered your ability to meet these goals.

STEP 6: ADJUST COURSE

	<p> 6.a Progress and lessons learned summary tool: Using monitoring data (collected in step 5), reflect on progress toward your social-emotional wellness support goals (established in step 3). Based on these reflections, summarize lessons learned.</p>
	<p>Prepare for the next planning cycle: Build on your successes and lessons learned in the current planning cycle when looking ahead to future social-emotional wellness support planning.</p> <p>? 6.b Reflection questions to support future planning: Consider how to adjust your planning in future cycles, including by applying lessons learned (identified earlier in step 6) and revisiting plans for your team, purpose, and capacity building (step 1), as well as your needs assessment (step 2).</p>

For more information: Resources that define and describe OSS's approach to social-emotional wellness.

- Handout: *Why promote mental and emotional wellness for students and staff?* (**Link forthcoming**)
- Logic model: *Strengthening student and staff wellness in Pennsylvania K-12 schools* (**Link forthcoming**)
- Handout: *How to take an evidence-based approach to promote mental and emotional wellness for students and staff* (**Link forthcoming**)

Resource Appendix

1.b Explanations of social-emotional wellness topics

Purpose:

- Prepare to explain topics related to social-emotional wellness to district staff, school staff, and community members.
- Prepare to demystify topics related to social-emotional wellness and build a common language for discussing these topics.

Uses:

- Reference this resource when planning for and engaging in conversations with district staff, school staff, and community members.
- Apply language from this resource when engaging in activities intended to build district, school, and community buy-in to social-emotional wellness efforts.

Question	Response
Define social-emotional wellness and related supports	
What is social-emotional wellness for students?	<ul style="list-style-type: none"> • Student social-emotional wellness includes (but is not limited to) (1) responsible decision-making, (2) mental and emotional well-being, (3) resilience and self-efficacy, (4) self-awareness and self-management, and (5) establishing and maintaining relationships. • We can promote students' social-emotional wellness by supporting them to develop these attitudes and skills.
What is social-emotional wellness for staff?	<ul style="list-style-type: none"> • Staff social-emotional wellness includes (but is not limited to) (1) teaching efficacy, (2) mental and emotional well-being, (3) opportunities for professional learning and growth, and (4) professional well-being and job satisfaction. • We can promote staff social-emotional wellness by providing supports and structures that develop these qualities.
Social-emotional wellness is NOT...	<ul style="list-style-type: none"> • <i>A buzzword or fad.</i> Promoting social-emotional wellness is a long-term priority and a critical foundation for learning and life success. 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. • <i>A fictional or overblown issue.</i> 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. • <i>A substitute for academic skills.</i> On the contrary, 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 are associated with increases in student academic achievement and attainment. • <i>A topic better left to households.</i> Schools can play an important role in promoting social-emotional wellness for students. In fact, 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.
What are safe and supportive learning environments and how do they relate to social-emotional wellness?	<ul style="list-style-type: none"> • In supportive learning environments, students feel a sense of safety and belonging and have positive relationships with peers and adults. • Specifically, safe and supportive learning environments are characterized by (1) connectedness and engagement, (2) supportive interpersonal relationships, (3) support for learning and development, (4) physical and psychological safety, and (5) social inclusion. • Research suggests that student and staff social-emotional wellness and safe and supportive learning environments work cohesively to enable positive outcomes for students.

1.b Explanations of social-emotional wellness topics

Question	Response
What do social-emotional wellness programs and practices look like?	<ul style="list-style-type: none"> • Leaders are encouraged to promote a continuum of supports for students and staff, using programs and practices with proven effectiveness. • 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). • 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. • Leaders are also encouraged to promote training, technical assistance, and professional development opportunities for staff at all levels to build sustainable and sufficient system capacity to implement social-emotional wellness supports.
What role can district and school staff play in promoting social-emotional wellness?	<ul style="list-style-type: none"> • Promote staff and community engagement by demystifying social-emotional wellness concepts. • Engage in data analysis and conversations with staff and students (if applicable) to assess social-emotional wellness needs. • Promote the adoption of evidence-based social-emotional wellness programs and practices. Make relevant resources available. Deliver supports (if applicable). • Build capacity of staff to deliver social-emotional wellness supports by offering high-quality training and professional development.
Explain reasons for prioritizing the promotion of social-emotional wellness and safe and supportive learning environments	
Why are we focused on promoting social-emotional wellness and safe and supportive learning environments?	<ul style="list-style-type: none"> • Social-emotional wellness provides a critical foundation for learning and life success. • By creating safe learning environments, we enable the formation of positive and supportive relationships and improve conditions for learning. • Students and staff in our communities exhibit social-emotional wellness needs that deserve to be addressed.
What are the other benefits of social-emotional wellness for students?	<ul style="list-style-type: none"> • <i>Attitudes and behavior:</i> Students who engage with evidence-based interventions show improved attitudes towards themselves and others, increased prosocial behaviors, and mitigated behavioral problems. • <i>Academic achievement:</i> Students who participate in social-emotional learning programs, which seek to boost emotion regulation and responsible decision-making, may experience improved academic achievement and attainment. • <i>Long-term outcomes:</i> Students with strong social and emotional skills may experience more positive outcomes later in life, such as in the areas of employment, criminal activity, substance abuse, relationship health, and mental health.
What are the other benefits of social-emotional wellness for staff?	<ul style="list-style-type: none"> • <i>Retention:</i> The job-related wellness of teachers, especially positive emotions in the workplace, plays an important role in job satisfaction and retention. • <i>Student achievement:</i> When teachers experience burnout and stress, student achievement and wellness can decline. • <i>School climate:</i> Trust and community among teachers are strong predictors of the success of schools' improvement initiatives, while teacher stress has been linked to negative effects on broader school climate.
Describe the Pennsylvania Department of Education's Office for Safe Schools' (OSS) approach to promoting social-emotional wellness and safe and supportive learning environments	
What is OSS' social-emotional wellness goal for students, staff, and communities?	<ul style="list-style-type: none"> • Our 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. • 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.

1.b Explanations of social-emotional wellness topics

Question	Response
<p>What values guide OSS' efforts to promote social-emotional wellness?</p>	<p>We apply several values and approaches that promote supportive learning environments and build social-emotional wellness:</p> <ul style="list-style-type: none"> • <i>Evidence-based practices</i>: We strive to apply practices with proven positive effects, to ensure the best outcomes for our students and staff, and that our time and resources are expended efficiently. • <i>Equitable trauma-informed learning environments</i>: We develop trauma-informed learning environments and relationships that promote equity, inclusion, and belonging, so that students and staff feel safe and supported. • <i>Multi-tiered systems of support</i>: We promote 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.
<p>What role do IU Social-Emotional Wellness Leads play in promoting social-emotional wellness?</p>	<p>IU Social-Emotional Wellness Leads play an important role in...</p> <ul style="list-style-type: none"> • Building district and school staff capacity to plan and deliver social-emotional wellness supports tailored to community need. • Promoting shared understanding and coordination of social-emotional wellness efforts across all levels of the Pennsylvania education system.
<p>What can districts, schools, and community members expect from their IU Social-Emotional Wellness Lead?</p>	<p>IU Social-Emotional Wellness Leads will...</p> <ul style="list-style-type: none"> • Provide resources, professional development, and technical assistance 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. • Provide staff opportunities to collaboratively problem solve and plan for social-emotional wellness supports in their districts and schools.

1.d Reflection questions on perceptions of social-emotional wellness in your IU

Purpose:

- Identify how social-emotional wellness is currently defined in your IU and how social-emotional wellness supports are positioned within overall programming.
- Consider how perceptions of social-emotional wellness in your IU differ from explanations included in resource *1.b Explanations of social-emotional wellness topics*, and what contextual factors may influence these perceptions.

Uses:

- Respond to these reflection questions as you begin the process of planning for social-emotional wellness supports.
- Identify questions that require additional information to answer and consider how you can gather this information from district staff.
- Discuss your responses with other IU Social-Emotional Wellness Leads to identify themes across IUs.

How is social-emotional wellness defined in my IU?

- What words and phrases do IU and district staff use to describe social-emotional wellness and related supports? What words and phrases are taboo, avoided, or elicit a negative reaction? How do I know?
- Are there particular aspects of social-emotional wellness and related supports that resonate most with IU and district staff? What are they?
- How are social-emotional wellness and related supports talked about in the community (district communication, community groups, the news, families)? What terminology is used most frequently? What words and phrases are taboo, avoided, or elicit a negative reaction? How do I know?
- How are perceptions of social-emotional wellness in your IU aligned to the guidance included in resource *1.b Explanations of social-emotional wellness topics*? How are perceptions in your IU different from, or at odds, with this guidance?
- What contextual factors (governance, politics, influential leaders, funding, capacity) may be influencing how social-emotional wellness is defined in your IU?

How are social-emotional wellness supports currently positioned in my IU?

- How do IU and district staff talk about social-emotional wellness supports in relation to other programming (academic, extracurricular, other programs)? How do they describe the relative importance of social-emotional wellness supports for students and staff?
- How do IU and district staff describe the rationale for these supports? What reasons or justifications for these supports resonate with staff most?
- How would staff describe what it looks like to promote social-emotional wellness at the IU, district, and school levels? What examples of social-emotional wellness supports do they provide?
- How are attitudes toward social-emotional wellness supports in your IU aligned to the guidance included in resource *1.b Explanations of social-emotional wellness topics*? How are perceptions in your IU different from, or at odds, with this guidance?
- What contextual factors (governance, politics, influential leaders, funding, capacity) may be influencing how social-emotional wellness is positioned within overall programming in your IU?

1.e IU capacity assessment tool

Purpose:

- Systematically identify the assets and resources related to social-emotional wellness your IU currently has by considering the capacity of your IU on four dimensions: human, organizational, structural, and material capacity.

Uses:

- Fill in the table to identify (1) assets you can leverage when planning and delivering social-emotional wellness supports, and (2) gaps to address through capacity-building efforts.
- Discuss your IU’s assets and gaps with other IU Social-Emotional Wellness Leads to identify commonalities and opportunities for collaboration and joint problem-solving.

1.e IU capacity assessment tool

(1) Human capacity			
Human capacity includes the staff, knowledge, and skills needed to deliver social-emotional wellness supports, as well as interest and buy-in from staff and community members needed to engage with social-emotional wellness supports.			
Categories	Assets	Gaps	Notes
	List specific examples your IU currently has in each category, or...	Add an X if there are no current examples.	Add notes to clarify these examples or gaps.
State and regional actors and organizations providing social-emotional wellness services and supports	•		•
District and school-based actors and organizations providing social-emotional wellness services and supports	•		•
Community-based organizations	•		•
Trainings and professional development for staff	•		•
Staff interest and engagement with initiatives and resources (see resource 1.f District mapping tool for additional indicators of engagement)	•		•
Staff and community buy-in (see resource 1.f District mapping tool for additional indicators of buy-in)	•		•
Your own knowledge and skills to plan and deliver supports	•		•
Other:	•		•
Other:	•		•

1.e IU capacity assessment tool

(2) Organizational capacity

Organizational capacity includes the ability of staff and educational entities to communicate and collaborate to deliver social-emotional wellness supports.

	Assets	Gaps	Notes
Example categories	List specific examples your IU currently has in each category, or...	Add an X if there are no current examples.	Add notes to clarify these examples or gaps.
Professional networks and working groups	•		•
Cross-functional teams	•		•
Recurring meetings and touchpoints between key actors	•		•
Ongoing means of collective problem-solving and sharing of best practices	•		•
Partnerships with community-based organizations	•		•
Other:	•		•
Other:	•		•

(3) Structural capacity

Structural capacity includes the policies and procedures that support and incentivize efforts to promote social-emotional wellness.

(These exist independently of the people working within relevant educational entities.)

	Assets	Gaps	Notes
Example categories	List specific examples your IU currently has in each category, or...	Add an X if there are no current examples.	Add notes to clarify these examples or gaps.
Supportive school board decisions	•		•
Supportive district and school rules, procedures, and norms	•		•
Supportive state laws and regulations	•		•
Effective hiring practices	•		•
Other:	•		•
Other:	•		•

1.e IU capacity assessment tool

(4) Material capacity			
Material capacity includes the funds, resources, time, and materials needed to deliver social-emotional wellness supports.			
	Assets	Gaps	Notes
Example categories	List specific examples your IU currently has in each category, or...	Add an X if there are no current examples.	Add notes to clarify these examples or gaps.
Adequate number of staff, and staff time	•		•
Your own time	•		•
State and local funding	•		•
Competitive grant program funds	•		•
Existing tools (for example, from PDE and other organizations)	•		•
Partnerships with private organizations	•		•
Other:	•		•
Other:	•		•

Note: Capacity category descriptions were adapted from the following resource: Lammert, J. D., Johnson, L., & Fiore, T. A. (2015). Conceptualizing capacity building. Westat. <https://www2.ed.gov/about/offices/list/osers/osep/rda/cipp2-conceptualizing-capacity-building-2-10-15.pdf>

1.f District mapping tool

Purpose:

- Visualize your districts’ current involvement with efforts to promote social-emotional wellness on two dimensions: engagement and buy-in, and cluster or group districts with similar involvement.

Uses:

- For each district in your IU, check off the example engagement and buy-in indicators that apply. Then, sum the total indicators identified for each district, and plot districts on the engagement X buy-in continuum according to the number of indicators you identified. For example, districts with more engagement indicators are more active on the engagement continuum.
- Complete this exercise as you begin to plan for social-emotional wellness supports that are aligned to districts’ varying levels of involvement.
- Revisit your responses to examine changes in districts’ engagement with and buy-in to social-emotional wellness efforts over time.
- Discuss your responses with other IU Social-Emotional Wellness Leads and OSS staff to generate ideas for engaging with districts with varied levels of engagement and buy-in.

	[DISTRICT A]																		
Engagement examples																			
Has hosted events intended to promote student or staff social-emotional wellness.	X																		
Supports ongoing programs and initiatives intended to promote student or staff social-emotional wellness.																			
Has established partners or teams that coordinate social-emotional wellness supports.																			
Gathers (or promotes the gathering of) data to assess social-emotional wellness outcomes.	X																		
Seeks out professional development opportunities related to promoting social-emotional wellness for students or staff.	X																		
Invites community members to contribute to social-emotional wellness efforts.																			
Total engagement indicators	3																		
Buy-in examples																			
Acknowledges the importance of promoting social-emotional wellness for students.	X																		
Acknowledges the importance of promoting social-emotional wellness for staff.																			
Makes promoting social-emotional wellness for students a priority.																			
Makes promoting social-emotional wellness for staff a priority.																			
Recognizes the role of equitable, trauma-informed frameworks in promoting social-emotional wellness for students and staff.																			
Openly promotes social-emotional wellness activities to the broader school community.	X																		
Total buy-in indicators	2																		

1.f District mapping tool

Engagement	6							
	5							
	4							
	3		District A					
	2							
	1							
	0							
		0	1	2	3	4	5	6
		Buy-in						

2.a Questions for district staff to gather information about social-emotional wellness needs

Purpose:

- Engage in conversations with district staff to gather more information about the district’s social-emotional wellness needs, including which needs are most pressing and how district staff observe, measure, and track these needs.

Uses:

- Use this list of discussion questions and note-taking template as a guide for your conversations with district staff.
- Collecting this information from most or all of your districts will prepare you to synthesize district needs across your IU using the other resources in step 2.

DISTRICT NAME:		
	Identifying needs	Methods for identifying needs
Main discussion questions:	<p>What are your district’s main needs related to each category below?</p> <p><i>(You may use the dimensions to guide your thinking, but their specific needs may not fall neatly into the dimension categories.)</i></p>	<p>What led you to notice needs in each category? For example, are your observations based on existing data, day-to-day-experience, or something else?</p>
Additional probes:	<ul style="list-style-type: none"> Which needs are most pressing? Why? Have these needs changed over time? In what ways? How do you know? (e.g., based on existing data, day-to-day-experience, or something else?) What unique needs do students in specific population groups (e.g., those identifying with a minority race or ethnicity group, with lower family income, with special education needs, or multilingual learners) have in this area? 	<ul style="list-style-type: none"> Do you currently use data to assess and monitor social-emotional wellness and/or learning environments in your schools? Which data source(s) do you currently use, if any? Do you have processes in place for analyzing your data and summarizing key findings? If not, is this an area in which your district needs support? What types of supports may be helpful? If you have findings from your data, what do they suggest about social-emotional wellness and/or the learning environment? Are you interested in using additional data to assess and monitor social-emotional wellness and/or the learning environment? Which data source(s) from resource 2.d <i>Detailed list of data sources for assessing social-emotional wellness needs</i> may work well for you?
<p>Student social-emotional wellness</p> <p><i>Dimensions may include:</i></p> <ul style="list-style-type: none"> <i>Responsible decision-making</i> <i>Mental and emotional well-being</i> <i>Resiliency and self-efficacy</i> 		

2.a Questions for district staff to gather information about social-emotional wellness needs

<ul style="list-style-type: none"> • <i>Self-awareness and self-management</i> • <i>Establishing and maintaining relationships</i> 		
<p>Staff social-emotional wellness</p> <p><i>Dimension may include:</i></p> <ul style="list-style-type: none"> • <i>Teaching efficacy</i> • <i>Mental and emotional well-being</i> • <i>Opportunities for professional learning and growth</i> • <i>Professional well-being and job satisfaction</i> 		
<p>Safe and supportive learning environments</p> <p><i>Dimensions may include:</i></p> <ul style="list-style-type: none"> • <i>Connectedness and engagement</i> • <i>Supportive interpersonal relationships</i> • <i>Support for learning and development</i> • <i>Physical and psychological safety</i> • <i>Social inclusion</i> 		

2.c Summary of data sources by social-emotional wellness dimension

Purpose:

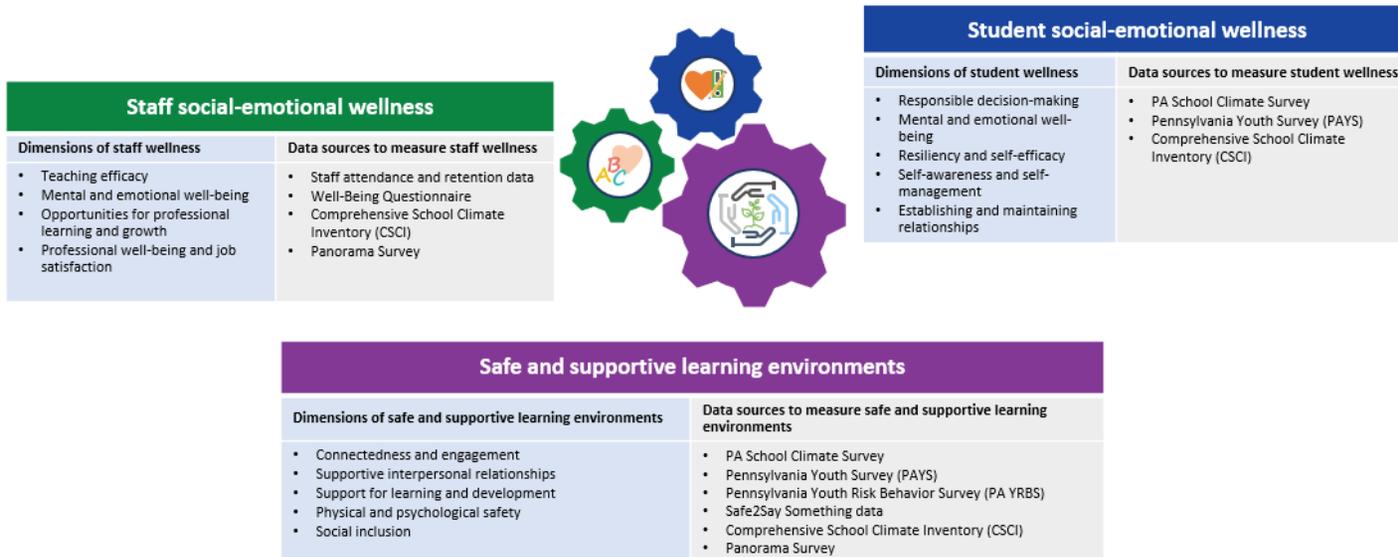
- Gain an understanding of which data sources can be used to measure staff social-emotional wellness, student social-emotional wellness, and safe and supportive learning environments in schools in your IU.

Uses:

- Reference this resource when identifying data sources that can be used to assess the social-emotional wellness needs in your IU, or in specific districts or schools within your IU.

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.¹



2.d Detailed list of data sources for assessing social-emotional wellness needs

Purpose:

- Work with districts to identify data source(s) they can feasibly collect to reliably assess and monitor their districts’ social-emotional wellness needs.
- Identify data source(s) that you can feasibly collect to reliably assess and monitor social-emotional wellness needs in your IU.

Uses:

- Reference this resource internally when identifying data sources that can be used to assess the social-emotional wellness needs in your IU, or in specific districts or school within your IU.
- Refer to this resource when providing technical assistance or holding professional development sessions for district staff related to collecting and analyzing data about social-emotional wellness.

Key	
Icon	Category
	Staff social-emotional wellness
	Student social-emotional wellness
	Supportive learning environments

2.d Detailed list of data sources for assessing social-emotional wellness needs

Data source	What does it measure?	Description	Who collects the data?	How often are the data collected?	At what level are the data reported?	Where are the data stored?	How can I access the data?
<p>Universal data <i>All or most districts regularly collect these data.</i></p>							
Discipline referrals		<p>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.</p>	District or school staff	Annually	School, district	District and/or school records systems	From district or school staff
Mental health referrals		<p>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 self-efficacy.</p>	District or school staff	Annually	School, district	District and/or school records systems	From district or school staff
Safe2Say Something data		<p>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.</p>	District Safe2Say teams	Annually	District, IU	District Safe2Say team records	From district Safe2Say teams

2.d Detailed list of data sources for assessing social-emotional wellness needs

Data source	What does it measure?	Description	Who collects the data?	How often are the data collected?	At what level are the data reported?	Where are the data stored?	How can I access the data?
Student Assistance Program (SAP) referrals		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	Annually	School, district	District and/or school records systems	From district or school staff
Staff attendance and retention data		School and district 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	Annually	School, district	District and/or school records systems	From district or school staff
Student attendance and chronic absenteeism data		Student attendance data measures the percentage of school days in which students attend school. Chronic absenteeism measures 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	Annually	School, district	District and/or school records systems	From district or school staff
Student dropout rate (grades 9–12)		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	Annually	School, district	District and/or school records systems	From district or school staff

2.d Detailed list of data sources for assessing social-emotional wellness needs

Data source	What does it measure?	Description	Who collects the data?	How often are the data collected?	At what level are the data reported?	Where are the data stored?	How can I access the data?
Strategic data							
<i>Educational entities must opt into these data sources.</i>							
Comprehensive School Climate Inventory (CSCI)		Survey developed by the National School Climate Center 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. This document includes a full list of dimensions the CSCI measures.	The National School Climate Center	Varies	Varies	Varies	Visit the National School Climate Center website for information about purchasing the CSCI.
Panorama Student Survey		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 these data.	Varies	School, district	District and/or school records systems	Visit the Panorama website to download the Panorama Student Survey .

2.d Detailed list of data sources for assessing social-emotional wellness needs

Data source	What does it measure?	Description	Who collects the data?	How often are the data collected?	At what level are the data reported?	Where are the data stored?	How can I access the data?
Panorama Teacher and Staff Survey		<p>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.</p>	<p>Districts or schools may opt into this data source. District or school staff would collect these data.</p>		School, district	District and/or school records systems	<p>Visit the Panorama website to download the Panorama Teacher and Staff Survey.</p>
Pennsylvania School Climate Survey		<p>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.</p> <p>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.</p>	<p>Districts or schools may opt into this data source. District or school staff would collect these data.</p>	Varies	School, district	District and/or school records systems	<p>Connect with district or school staff. If you'd like to administer the school climate survey in partnership with a school in your region, visit the PA School Climate Survey Site for instructions and contact information.</p>

2.d Detailed list of data sources for assessing social-emotional wellness needs

Data source	What does it measure?	Description	Who collects the data?	How often are the data collected?	At what level are the data reported?	Where are the data stored?	How can I access the data?
Pennsylvania Youth Risk Behavior Survey		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)	Every two years	State	Not applicable	Visit the CDC’s Youth Risk Behavior Surveillance System webpage . Select a Data Analysis Tool from the lower righthand side. The Youth Online Data Analysis Tool 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.”

2.d Detailed list of data sources for assessing social-emotional wellness needs

Data source	What does it measure?	Description	Who collects the data?	How often are the data collected?	At what level are the data reported?	Where are the data stored?	How can I access the data?
Pennsylvania Youth Survey (PAYS)		<p>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.</p>	<p>The Pennsylvania Commission on Crime and Delinquency (PCCD) selects schools to administer the survey.</p>	<p>Every two years</p>	<p>County, state</p>	<p>PCCD's system and public reports</p>	<p>Visit the PCCD PAYS webpage, click on PAYS Archive, and select your year of focus. For example, this site is the 2021 PAYS landing page. Expand the "2021 PAYS Results" section to access PAYS County Reports. If you'd like to view a PAYS report for a region that does not correspond directly with a county, you may fill out a Special Report Order Form from the 2021 PAYS landing page.</p>

2.d Detailed list of data sources for assessing social-emotional wellness needs

Data source	What does it measure?	Description	Who collects the data?	How often are the data collected?	At what level are the data reported?	Where are the data stored?	How can I access the data?
The School Health Assessment and Performance Evaluation (SHAPE) System		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.	Varies	School, district	District and/or school records systems	Connect with district or school staff.
Teacher Subjective Wellbeing Questionnaire		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.	Varies	School, district	District and/or school records systems	Visit the EdInstruments webpage 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.

2.e Data collection table for district needs assessment

Purpose:

- Record and summarize the information you gather about districts’ social-emotional wellness needs.

Uses:

- View the social-emotional wellness needs in your region in one document and look across districts to note similarities and differences. Use this resource to inform both IU-wide and district-specific supports you might provide.

District	Information about students’ social-emotional wellness needs	Information about staff members’ social-emotional wellness needs	Information about safe and supportive learning environments	Information sources
	<p><i>This may include (but is not limited to):</i></p> <ul style="list-style-type: none"> -Attendance -Referrals to Student Assistance Program or mental health support -Discipline incidents or referrals -Observations or comments from district or school staff -Survey data such as the PA School Climate Survey, Pennsylvania Youth Survey (PAYS), Panorama Survey, etc. 	<p><i>This may include (but is not limited to):</i></p> <ul style="list-style-type: none"> -Staff attendance or retention -Observations or comments from district or school staff -Survey data such as the Teacher Subjective Wellbeing Questionnaire, the Panorama Survey, etc. 	<p><i>This may include (but is not limited to):</i></p> <ul style="list-style-type: none"> -Attendance -Safe2Say Something reports -Observations or comments from district or school staff -Survey data such as the PA School Climate Survey, The School Health Assessment and Performance Evaluation, PAYS, the Panorama Survey, etc. 	

2.g District needs synthesis tool

Purpose:

- Synthesize the information you've gathered about individual districts' social-emotional wellness needs to prioritize areas to focus your supports on.

Uses:

- To complete this table, reference the information you gathered about individual districts' needs using the other resources in step 2.
- Identify priority areas that will inform your planning of supports in step 3.

	Frequency	Urgency	Responsiveness	Looking ahead
Prompts to consider	Which needs come up most consistently across districts?	Which of these needs are most pressing for your IU? <i>Consider:</i> <i>-Which of these needs affect the highest numbers of students and/or staff?</i> <i>-Which of these needs require immediate action to support student and staff well-being?</i>	Which needs might I be able to address this year? <i>Refer to resource 1.e IU capacity assessment tool.</i>	How might I address those needs?
Student social-emotional wellness				
Staff social-emotional wellness				
Safe and supportive learning environments				

3.d List of evidence-based, social-emotional wellness resource centers

<p>Purpose:</p> <ul style="list-style-type: none"> Identify evidence-based programs and practices that best fit the needs and contexts of students and staff in each district and school community. <p>Uses:</p> <ul style="list-style-type: none"> Reference this list when seeking evidence-based supports. The evidence-based resource centers listed are repositories of relevant evidence-based social-emotional wellness resources.

Evidence-based resource centers			
Acronym	Name	Description	Link
<i>Pennsylvania-specific resource center</i>			
ERC	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.	Home Pennsylvania Evidence Resource Center (evidenceforpa.org)
<i>National resource centers</i>			
CASEL	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.	Advancing Social and Emotional Learning - CASEL
PBIS	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.	Center on PBIS
SHAPE	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.	SHAPE – School Health Assessment and Performance Evaluation (theshapesystem.com)
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.	WWC Find What Works! (ed.gov)

3.e Guidance for selecting evidence-based, social-emotional wellness strategies

Purpose:

- Identify evidence-based programs and practices that best fit the needs and contexts of students and staff in each district and school community.

Uses:

- Use the tool to identify evidence-based programs and practices for professional development, for school- or classroom-based practices, and to support data tracking and monitoring.
- When selecting supports for districts, schools, and classrooms, opt for those that have proven effectiveness for the identified priority outcomes, and identify programs that best fit the students and staff in the school community. Take into consideration the items in this list when identifying evidence-based social-emotional wellness supports.

Identify evidence-based programs and practices

<i>Considerations for your search</i>	<i>What to look for</i>
<p>Key terms</p>	<p>When searching for supports in evidence-based resource centers (like those described in resource 3.d), consider searching for one or more of the following terms:</p> <ul style="list-style-type: none"> • Mental health • Behavioral health • Prevention programs • Social-emotional learning • Social-emotional wellness • Equitable learning environments • Trauma-informed learning environments • Equity, inclusion, and belonging • Multi-tiered systems of support <p>Also consider searching for terms directly related to the outcomes you’re prioritizing:</p> <ul style="list-style-type: none"> • Responsible decision-making • Student or child mental and emotional well-being • Adolescent mental and emotional well-being • Resiliency and self-efficacy • Self-awareness and self-management • Establishing and maintaining relationships • Teaching efficacy* • Opportunities for professional learning and growth* • Professional well-being and job satisfaction* • Connectedness and engagement • Supportive interpersonal relationships • Support for learning and development • Physical and psychological safety • Social inclusion <p>*Not all resource centers will include resources to improve staff social-emotional wellness.</p>

3.f Statement of work checklist

Tiers of evidence	<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> to a given strategy or research finding. The evidence tiers under the Every Student Succeeds Act (ESSA) are designed to ensure that states, districts, and schools can identify programs, practices, products, and policies that work across various populations. There are four evidence tiers:</p> <ul style="list-style-type: none">• Tier 1: Strong• Tier 2: Moderate• Tier 3: Promising• Tier 4: Demonstrating a rationale <p>You can use the evidence tier assigned to a given strategy or research finding to understand the strength of the research evidence.</p> <p>For more information, see the ESSA Tiers of Evidence and What Works Clearinghouse.</p>
Relevant communities	<p>Identify resources proven to be effective in similar populations to those in your school community. Community populations may include <i>urban, suburban, rural, online or cyber school, and charter school</i>.</p> <p>Research on strategies may also have specific evidence for different demographic groups including <i>English learners, students from low-income communities, and students with disabilities</i>.</p> <p>Include one or more of the populations above in your search to ensure resources are relevant to the students in your school community.</p> <p>Consider reaching out to Social-Emotional Wellness Leads at other IUs with similar demographics to your region to ask if they have evidence-based resources that resonated with their communities.</p>
Grades studied	<p>Evidence-based research is available for students in prekindergarten through grade 12 and beyond. Include age ranges in your search to ensure resources are relevant for the students in your school community.</p>

3.f Statement of work checklist

Purpose:

- Consider how the evidence-based supports you've identified in each priority area fulfill your statement of work and identify outstanding statement of work requirements.

Uses:

- You can choose to use either of the two checklist formats.
 - Interactive table format: Fill out the table while planning for supports that align to each requirement in the IU Social-Emotional Wellness Lead statement of work. Track the date you complete each activity and related notes.
 - Reference document format: Refer to this document when planning and delivering supports to cross-check your planned supports with the IU Social-Emotional Wellness Lead statement of work requirements.

Interactive table format

Required activity	Relevant activities	Check when completed	Date(s) activities completed	Notes
General best practices				
When designing and delivering activities to improve the learning environment, follow a cycle of improvement process .		<input type="checkbox"/>		
All TA should have an equitable, trauma-informed basis for consultation. Use equity, inclusion, and belonging at the core of all decision-making and data considerations.		<input type="checkbox"/>		
PD supports				
Host <u>at least two</u> PD opportunities on social-emotional wellness topics, including a participant survey .		<input type="checkbox"/>		
		<input type="checkbox"/>		
Host <u>at least one</u> PD opportunity for catchment area based on needs identified in the Pennsylvania Youth Survey .		<input type="checkbox"/>		
TA supports				
Host <u>quarterly</u> LEA meetings to review social-emotional wellness topics using a learning community model.		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		

3.f Statement of work checklist

Required activity	Relevant activities	Check when completed	Date(s) activities completed	Notes
Provide ongoing individualized TA using the recommended frameworks provided by the PDE Social-Emotional Wellness Lead.		<input type="checkbox"/>		
Provide ongoing TA supports to LEAs on the use of data tools with a needs assessment focus. (Data examples include the PA School Climate Survey and the School Health Assessment and Performance Evaluation System.)		<input type="checkbox"/>		
Provide ongoing TA to assist LEAs in implementing equitable, trauma-informed practices .		<input type="checkbox"/>		
Maintain log of LEA supports .		<input type="checkbox"/>		
Submit log <u>quarterly</u> to PDE Social-Emotional Wellness Lead.		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		
Continuous learning				
Attend <u>quarterly</u> IU Regional Network Meetings , with themes tied to systems conditions, academics, social-emotional learning, and scaffolded supports using an equity mindset.		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		
Attend <u>at least two</u> PD opportunities with a focus on positive learning environments . One must be hosted by the Office for Safe Schools, and one can be self-selected with PDE approval.		<input type="checkbox"/>		
		<input type="checkbox"/>		
Attend and help facilitate <u>twice annual</u> listening sessions hosted by the Regional Lead.		<input type="checkbox"/>		
Attend meetings determined by the PDE Social-Emotional Wellness lead.		<input type="checkbox"/>		
<i>Recommended:</i> Become NSCC certified or enrolled in the NSCC certification program.		<input type="checkbox"/>		

Source: IU Social-Emotional Wellness Lead statement of work, as of summer 2023.

IU is Intermediate Unit. LEA is local educational agency (or district). PD is professional development. PDE is Pennsylvania Department of Education. NSCC is National School Climate Center. PA is Pennsylvania. TA is technical assistance.

Reference document format

3.f Statement of work checklist

Required activities	
General best practices	
✓	When designing and delivering activities to improve the learning environment, follow a cycle of improvement process .
✓	All TA should have an equitable, trauma-informed basis for consultation. Use equity, inclusion, and belonging at the core of all decision-making and data considerations.
PD supports	
✓	Host <u>at least two</u> PD opportunities on social-emotional wellness topics, including a participant survey .
✓	Host <u>at least one</u> PD opportunity for catchment area based on needs identified in the Pennsylvania Youth Survey .
TA supports	
✓	Host <u>quarterly</u> LEA meetings to review social-emotional wellness topics using a learning community model.
✓	Provide ongoing individualized TA using the recommended frameworks provided by the PDE Social-Emotional Wellness Lead.
✓	Provide ongoing TA supports to LEAs on the use of data tools with a needs assessment focus. (Data examples include the PA School Climate Survey and the School Health Assessment and Performance Evaluation System.)
✓	Provide ongoing TA to assist LEAs in implementing equitable, trauma-informed practices .
✓	Maintain log of LEA supports . Submit log <u>quarterly</u> to PDE Social-Emotional Wellness Lead.
Continuous learning	
✓	Attend <u>quarterly</u> IU Regional Network Meetings , with themes tied to systems conditions, academics, social-emotional learning, and scaffolded supports using an equity mindset.
✓	Attend <u>at least two</u> PD opportunities with a focus on positive learning environments . One must be hosted by the Office for Safe Schools, and one can be self-selected with PDE approval.
✓	Attend and help facilitate <u>twice annual</u> listening sessions hosted by the Regional Lead.
✓	Attend meetings determined by the PDE Social-Emotional Wellness lead.
✓	<i>Recommended:</i> Become NSCC certified or enrolled in the NSCC certification program.

Source: IU Social-Emotional Wellness Lead statement of work, as of summer 2023.

IU is Intermediate Unit. LEA is local educational agency (or district). PD is professional development. PDE is Pennsylvania Department of Education. NSCC is National School Climate Center. PA is Pennsylvania. TA is technical assistance.

4.b Checklist for delivering accessible, high-quality social-emotional wellness supports

Purpose:

- Leverage existing frameworks and guidance to improve delivery of social-emotional wellness supports.

Uses:

- Before delivering social-emotional supports, check that you've taken the following steps to ensure your delivery is trauma-informed, accessible, and engaging for the intended audience. Revisit the linked resources for further information on applying these best practices.

Best practices and related guidance for delivering social-emotional wellness supports

✓ Apply equitable, trauma-informed principles.

- [PDE's Empowerment Through Common Language in Pennsylvania: A Dictionary of Terms Related to Trauma-Informed Approaches in Schools](#) provides language you can apply when discussing trauma-informed practices and related concepts.
- [PDE's Equitable Practices Hub](#) provides numerous resources (including several listed below) to support the delivery of supports aligned to equitable education principles.
- [PDE's Glossary of Equity, Inclusion and Belonging \(EIB\) Terms for Pennsylvania Learning Environments](#) provides language you can apply when discussing EIB concepts.
- [PDE's "What is EIB in Pennsylvania Schools?" infographic](#) addresses perceptions and offers clarity on equitable practices in education and can be used as a resource when delivering supports.
- [PDE's Culturally-Relevant and Sustaining Education \(CR-SE\) Program Framework Guidelines](#) outline best practices and key terms for educator training in CR-SE that can be applied when delivering supports to district staff.
- [PDE's Accelerated Learning Toolkit](#) includes numerous additional resources that can be applied when conducting needs assessments, wellness programming, and family and community engagement.
- [CASEL's Reunite, Renew, and Thrive guide](#) provides resources for centering relationships and building on the existing strengths of a community during delivery.
- [SHAPE's Trauma Responsive Schools Implementation Assessment](#) provides questions that can be used to help districts reflect on trauma-responsive programming.

✓ Ensure delivery is accessible and engaging for the intended audience.

- [PDE's Establish Healthy System Conditions resource page](#) links to trainings and resources with guidance for engaging staff effectively.
- [WISE's Compassion Resilience Toolkit For Schools](#) provides strategies for maintaining a compassionate presence in interactions with school community staff.
- [Stanford's d.school Design Thinking Bootcamp guide](#) describes dozens of specific methods for incorporating concepts from human-centered design into your delivery.
- [Bellwether's Lost by Design: Designing From the Margins Toolkit](#) provides strategies for incorporating human-centered, collaborative design strategies into your delivery.
- [Facilitating Power's Spectrum of Family and Community Engagement for Educational Equity guide](#) provides language and frameworks for engaging with school community members (including district and school staff) as partners.

Tip: Avoid "reinventing the wheel" by using existing, high-quality supports

- Before using this checklist to refine your *delivery* of supports, consider whether you have taken advantage of existing, evidence-based resources when *selecting* supports.
- Reference the resources from step 3 of the Planning Guide to identify evidence-based resources.

5.a List of possible questions to ask district staff to assess the effectiveness of supports

Purpose:

- Monitor progress toward goals for district staff engagement and satisfaction with social-emotional wellness supports, as well as goals for the reported impacts of these supports (when applicable).

Uses:

- Choose questions from this list that will solicit information from district staff relevant to your goals. During or after delivering social-emotional wellness supports, ask district staff the selected questions. Questions can be asked during follow-up conversations with staff or through a short survey.
- Revisit district staff's responses to selected questions to monitor progress toward goals and improve the content and delivery of future supports.

Content and quality

1. What knowledge or skills did you take away from this support?
2. To what extent did this support relate to or build on your existing knowledge and skills?
3. On a scale from 1–10, how easy was it to understand this support? Why?
4. What aspects of the support did you find most important to your understanding or skill development? What aspects were less important, distracting, or confusing?
5. How interesting or engaging did you find the support? Why?

Applicability

1. To what extent did this support respond or relate to a social-emotional wellness need in your district?
2. To what extent did this support feel applicable to your work?
3. What aspects of this support were most and least relevant to your work?
4. How might you apply the knowledge and skills?
5. What are your "next steps" after engaging with this support?
6. How confident do you feel applying the knowledge or skills to your work? Why?

Tip: Use a combination of open-ended and multiple-choice questions when surveying district staff.

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?

- a) *Not at all*
- b) *To a small extent*
- c) *To a moderate extent*
- d) *To a large extent*
- e) *To a very large extent*

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

- a) *Not at all likely*
- b) *Somewhat likely*
- c) *Very likely*

Overall satisfaction

1. How likely would you be to recommend this support to a colleague in a similar position? Why?
2. We know your time is limited. To what extent was taking part in the support worth your time?

Looking ahead

1. What questions did you walk away with after engaging with this support?
2. What other supports would you find helpful? Should those look similar to or different from this support? How/why?

(If applicable) Implementation and impacts

1. How did you apply the knowledge and skills to your work? What did that look like?
2. When you applied these insights, what went well? What was challenging?
3. To what extent have you noticed changes in student or staff wellness in your district? What changes have you noticed? How do you know?
4. To what extent have the social-emotional wellness needs in your district changed? In what ways? How do you know?

5.b Monitoring social-emotional wellness supports table

Purpose:

- Monitor which supports you deliver and who receives each support. Self-reflect on what went well, what was challenging, and what questions or concerns came up.

Uses:

- Record information about the quantity, content, and effectiveness (where possible) of supports you delivered, according to your monitoring plan (created in step 3).
- Make a copy of the first template to record information about technical assistance activities delivered to individual districts.
- Make a copy of the second template to record information about professional development and training opportunities delivered to multiple districts.

5.b Monitoring social-emotional wellness supports table

Technical assistance for individual districts

Title:			
Description:			
Topics included:			
Participants:	<i>How many participants?</i>	<i>Which district received support?</i>	<i>Which staff members participated?</i>
Timeframe:	<i>Frequency of supports requested:</i>	<i>Start date:</i>	<i>End date:</i>
Reflection:	<i>What went well? What was challenging? Reflect on any lessons learned from providing this support.</i>		
Effectiveness:	<i>How well is this support working for the district(s)/ school(s)?</i>	<i>Describe any information sources (e.g., conversations with district staff, data on student referrals).</i>	

5.b Monitoring social-emotional wellness supports table

Professional development and trainings for multiple districts

Title:			
Description:			
Topics included:			
Participants:	<i>How many participants?</i>	<i>How many districts were represented?</i>	<i>Which districts?</i>
Timeframe:	<i>Date of training</i>		
Reflection:	<i>What went well? What was challenging? Reflect on any lessons learned from providing this training.</i>		
Effectiveness:	<i>Reflect on needed changes and effectiveness of delivery based on post-training survey.</i>	<i>What follow-up training/supports were indicated on survey?</i>	

6.a Progress and lessons learned summary tool

Purpose:

- Reflect on progress toward your social-emotional wellness support goals (established in step 3).
- Begin preparing for future planning and delivery of supports by summarizing highlights and lessons learned.

Uses:

- After delivering social-emotional wellness supports, reflect on these questions by applying your own experiences and insights from monitoring data (collected in step 5).

Reflection question	Response
Progress toward goals	
Which goals were you successful in reaching this year? How did you measure or observe this success?	•
Which goals are you still working toward? How do you know you didn't reach these goals?	•
Which of these goals (if any) will you continue to work toward in future years?	•
Highlights	
When did you feel most successful in your role this year? What did that success look and feel like?	•
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?	•
What resources or guidance was most helpful in carrying out your role this year? How did you use these resources? What improvements or changes did these resources support?	•
How did you address challenges that came up this year? When did you feel most successful addressing challenges?	•
Lessons learned	
What surprised you this year? What aspects of your role or supports played out differently than you'd expected or planned?	•
Fill in the blank. Looking back, I wish I had known ____.	•
Fill in the blanks. Instead of __, I wish I had ____.	•
Thinking about future planning and delivery of supports, what outstanding concerns do you have?	•
Thinking about future planning and delivery of supports, what questions do you have? What staff or resources could you consult to answer these questions?	•
What challenges do you anticipate in your role next year? What do you need to work through those challenges?	•
What are the two or three most important lessons you'd like to apply in your planning and delivery of supports next year?	•

6.b Reflection questions to support future planning

Purpose:

- Consider how to adjust your future planning by reflecting on your experiences building IU capacity, engaging districts, and addressing district needs.

Uses:

- First, answer the reflection questions about your experiences with specific planning topics.
- Second, apply your responses to answer the reflection questions about looking ahead to future planning.
- Third, revisit resources in this guide to update and refine your plans for future supports.

Topic	(1) Reflect →	(2) Look ahead →	(3) Update
Teaming	<ul style="list-style-type: none"> • Who contributed to or supported your work the most effectively? Why was their partnership particularly helpful? • How did PDE or other IU Social-Emotional Wellness Leads support your work? 	<ul style="list-style-type: none"> • Are there others in your network you'd like to partner with? Consider those in roles directly or adjacently focused on social-emotional wellness at other regional entities, district or school staff, or other staff at your IU. • What will their roles be? 	Resource 1.a <i>Planning committee table</i>
Capacity	<ul style="list-style-type: none"> • Did you have enough time allotted to this work? Did your workload feel just right, not enough, or too much? • What networks or partnerships supported your work? • What policies or procedures supported (or hindered) your work? • Were there adequate resources and funds to address your districts' requests? 	<ul style="list-style-type: none"> • What gaps in capacity continue to persist? • In which capacity areas will you plan to focus future capacity-building efforts? Consider human, organizational, structural, and material capacities. 	Resource 1.e IU <i>capacity assessment tool</i>
District engagement	<ul style="list-style-type: none"> • Which districts were most engaged with supports? Which were the least engaged? Why? • Which districts had the most buy-in to social-emotional wellness work? Which had the least buy-in? Why? 	<ul style="list-style-type: none"> • How did district engagement or buy-in change throughout the year? • Which supports garnered the most engagement or buy-in? 	Resource 1.f <i>District mapping tool</i>
Information you collect from districts	<ul style="list-style-type: none"> • What kinds of questions or communication methods were most effective in collecting information on district needs? • How did districts convey their social-emotional wellness needs? 	<ul style="list-style-type: none"> • What else do you need to learn from districts to align supports to their social-emotional wellness needs? 	Resource 2.a <i>Questions for district staff to gather information about social-emotional wellness needs</i>
Evolving district needs	<ul style="list-style-type: none"> • Which district needs were the focus of supports this year? 	<ul style="list-style-type: none"> • How have district needs evolved throughout the year? • Which needs do you anticipate being able to address next year? 	Resource 2.g <i>District needs synthesis tool</i>

6.b Reflection questions to support future planning

Topic	(1) Reflect →	(2) Look ahead →	(3) Update
Data to track district needs	<ul style="list-style-type: none">• How did you or district staff use data to understand social-emotional wellness needs?• Which data were most and least accessible? Most and least useful? Why?	<ul style="list-style-type: none">• What data do you plan to use, or plan to support districts in using, to track evolving needs?• What additional supports do you need to offer districts to use data to make decisions?	Resource 2.d <i>Detailed list of data sources for assessing social-emotional wellness needs</i>

Tip: Consider how to apply lessons learned to each component of this reflection.

In addition to reflecting on the questions listed in this resource, consider whether you can incorporate broader lessons learned into adjustments you make to future years of planning. (See resource 6.a *Progress and lessons learned summary tool* for questions prompting broader reflection.)