

# Science of Learning and Development Alliance Design Principles for Schools Planning Tool for Developing a System for Thriving and Learning



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# Introduction

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## What Is the Purpose of the Planning Tool?

This Planning Tool is to guide how you explore what is necessary to realize equitable, whole-child design. It will help you reflect, invest, and reallocate resources to create equitable, transformative learning environments—environments that will fully support young people in achieving their full potential as they expand their knowledge, formulate their own identities, and build agency over themselves and their learning experiences. The Planning Tool is for applying the Guiding Principles for Equitable Whole Child Design. This tool leverages research and practical experience from implementation and improvement science as well as analyses of robust equity to help you apply the design principles to your unique context. It will help you implement the design principles more efficiently, effectively, and sustainably. This Planning Tool can help you apply our best knowledge about how students learn and thrive to create equitable, transformative learning environments within their unique contexts while avoiding the pitfalls of fragmented, incoherent, inappropriate, incomplete, or watered-down efforts. The tool can help you think about, discuss, and codify your perceptions and/or data regarding your existing needs and assets and how they relate to proposals aimed at improving or transforming environments for

## The Guiding Principles for Equitable Whole Child Design

The Guiding Principles for Equitable Whole Child Design aims to seize this opportunity to advance change. The organizing framework to guide transformation of learning settings for children and adolescents is reflected in the five elements shown in the [Design Principles for Schools](#) playbook (Figure 1.1 in the playbook):

- Positive Developmental Relationships
- Environments Filled With Safety and Belonging
- Rich Learning Experiences and Knowledge Development
- Development of Skills, Habits, and Mindsets
- Integrated Support Systems

Although these elements resonate with most educators, they have not yet been widely used to develop and create learning settings, nor have they been engineered in fully integrated ways to yield healthy development, learning, and thriving. Progress has been impeded by both historical traditions and current policy built on dated assumptions about school design, accountability, assessment, and educator development. Current constraints do not support robust implementation, let alone integration of these practices. If, however, the purpose of education is the equitable, holistic development of each student, scientific knowledge from diverse fields can be used to redesign policies and practices to create settings that unleash the potential in each student.

Redesign around these core principles has implications for all levels of the ecosystem, from the classroom to the school, district, and larger macrosystems that must join together to produce an intentionally integrated, comprehensive developmental enterprise committed to equity for all students. We separate and enumerate each component individually, but we believe the unique application of these components will be to use them in reinforcing and integrated ways to truly support learner needs, interests, talents, voice, and agency. The aim is a context for development that is greater than the sum of its parts.

learning and development. You can also use the tool to better engage and systematically compare your perceptions and data-informed judgment with those of other team members, stakeholders, or consultants.<sup>1</sup>

## How to Use the Planning Tool?

Use the Planning Tool to think about and examine current and proposed programs, policies, structures, and practices. The tool uses a rubric to support individuals and teams to engage in action-oriented thought processes to consider whether plans and investments can create equitable, effective learning environments as operationalized in the [Design Principles for Schools](#) playbook. The tool’s rubric provides a common standard which, while adaptable to your own context, can tether your (and others’) thinking, judgements, and ratings to common standards grounded in the playbook, the science of learning and development, and the conceptualization of robust equity.

When you use the tool, consider how a particular program area relates to all three action lenses for equitable whole child design as elaborated in the playbook and illustrated in the figure on page 5 below. The tool provides language to anchor your and other individuals’ ratings to maximize the reliability of your analyses.<sup>2</sup>

Rating	Definition
<b>5 = Fully Addressed For All</b>	Implementers are actively and consistently applying comprehensive strategies to fulfill the indicator with explicit considerations to ensure this for <b>all</b> students in <b>all</b> contexts. <sup>a</sup>
<b>4 = Fully Addressed For Some</b>	Implementers are actively and consistently applying comprehensive strategies to fulfill the indicator, but those strategies are only benefiting <b>some</b> groups of students.
<b>3 = Partially Addressed For All</b>	Implementers are developing strategies, the strategies are not comprehensive, or the implementers are inconsistently applying them with explicit considerations for <b>all</b> students in <b>all</b> contexts.
<b>2 = Partially Addressed For Some</b>	Implementers are developing strategies, the strategies are not comprehensive, or the implementers are inconsistently applying them to benefit only <b>some</b> groups of students.
<b>1 = Not Addressed</b>	Implementers are in the process of planning for the development of strategies to address an indicator, but they have not developed or applied such strategies.

<sup>a</sup> For simplicity, “are” will be used to refer to both current and proposed plans and their anticipated effects/behaviors.

Rate an indicator as *fully addressed for all* when implementers are actively and consistently applying comprehensive strategies to fulfill the indicator. The distinction between *fully addressed for all* and *fully addressed for some* is important from an equity perspective. The rating, *fully addressed for all*, can only be present when there is evidence that all students (1) have access to and benefit from transformative educational environments and experiences *and* (2) experience the embodiment of these principles in all school contexts regardless of their background or identities.<sup>3</sup> For example, well-designed and well-implemented student surveys can be disaggregated to ensure marginalized or minoritized students report that they experience belonging in culturally affirming, safe environments. These efforts should then inform data-informed judgements and actions that can promote robust equity and eliminate disparities.

Rate an indicator as *fully addressed for some* when the following two conditions are in place: (1) implementers actively and consistently apply comprehensive strategies to fulfill the indicator, *but* (2) those strategies only benefit some (not all) groups of students (e.g., based on their backgrounds or identities). We include this rating because it is important to identify and address when current or potential investments or reallocations support or center on concerns and needs of some young people more than others. This rating should also be used when a strategy is actively and consistently applied to all students but only experienced by some.



**Note:** In requesting additional data collection, be sure that this data collection is needed and will be used to inform decision making as it is burdensome to participants in the short term.

Rate an indicator as *partially addressed for all* when the following two conditions are present: (1) implementers develop strategies to implement the principle, *but* (2) the strategies are not comprehensive, or implementers inconsistently apply them.

The standard *partially addressed for some* represents a judgement that the strategies only benefit some (not all) groups of students.

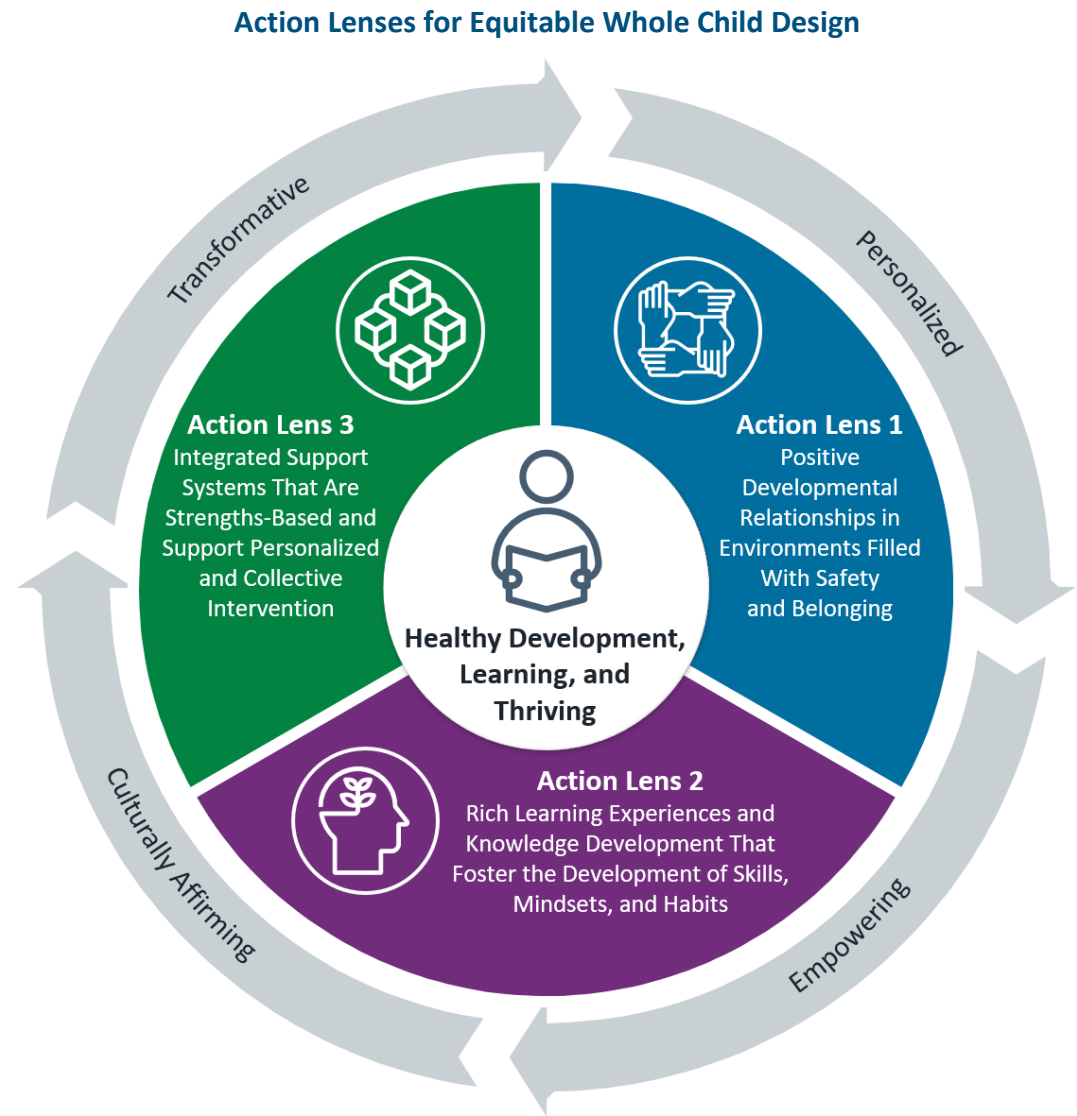
Rate an indicator as *not addressed* when implementers are in the process of planning for the development of strategies to address an indicator but they have not developed or applied such strategies. The assigned ratings should serve as a guide for investments and reallocations.

You may want to consult additional information sources. For example, existing data sources may not capture the perceptions or experience of culturally and linguistically diverse stakeholders. When this is the case, find or request additional data that enable you to better understand how students, families, and staff experience equitable, transformative practices and learning environments. Examples could include examining surveys of the conditions for learning through an equity lens.

## How Is the Planning Tool Organized?

We employ three action lenses to help you rate the Guiding Principles for Equitable Whole Child Design (as described on page 1) as you explore the interdependent principles that must be addressed to better promote student thriving, learning, and equity. The action lenses (and related playbook principles) are:

- First action lens: Positive developmental relationships in environments filled with safety and belonging (Principles 1 and 2).
- Second action lens: Rich learning experiences that foster the development of skills, mindsets, and habits (Principles 3 and 4).
- Third action lens: Integrated support systems (ISS) that are strengths-based and support personalized and collective intervention (Principle 5).



# The Planning Tool



## Action Lens 1: Positive Developmental Relationships in Environments Filled With Safety and Belonging

Think about how the proposed program, policy, structure, and practice will cultivate **positive developmental relationships in environments filled with safety and belonging**—specifically the extent to which each indicator is addressed. Using a scale of 1 to 5, rate your level of agreement that each indicator is addressed:

**1: Not addressed**

**2: Partially addressed for some**

**3: Partially addressed for all**

**4: Fully addressed for some**

**5: Fully addressed for all**



**What are positive developmental relationships?** [Positive developmental relationships](#) “are close connections through which young people discover who they are, cultivate abilities to shape their own lives, and learn how to engage with and contribute to the world around them” ([Search Institute, 2018](#)). These relationships are characterized by care, warmth, and attunement. They involve emotional attachment, reciprocal interactions, and a balance of power. Positive developmental relationships should be embodied and experienced in the interactions between all educators and all young people and their families.

**Why are developmental relationships important?** Developmental relationships enable students to manage stress, promote well-being, and fuel the connections that support the development of the complex skills and competencies necessary for learning success and engagement.<sup>4</sup>




**What are environments filled with safety and belonging?** [Environments filled with safety and belonging](#) are environments that foster students’ sense of belonging, ownership, and agency; buffer students’ experiences of stress, trauma, and other adversities; and provide physical, emotional, identity, and intellectual safety and consistency. Safe environments have shared values, routines, and high expectations (e.g., [Springfield Renaissance School](#)). These environments support physical and mental well-being. Safe environments should be culturally and linguistically responsive, anti-racist, and affirming for all students.

**Why are environments filled with safety and belonging important?** Environments filled with safety and belonging enhance student engagement, learning, and well-being, including students’ capacity to be creative and willingness to take risks.

**Dimensions of the First Action Lens: Positive Developmental Relationships in Environments Filled With Safety and Belonging**

Indicator	Rating	Comments and Notes (Including Source Data)
<p><b>As a result of the proposed program, policy, structure, and practices, school leaders and educators in collaboration with students and families will design schools and learning settings and environments that will facilitate personalizing relationships with students, supporting positive developmental relationships among staff, and building relationships with families.</b></p>		
<p> <b>Personalizing Relationships With Students—Example: <a href="#">Internationals Network</a></b></p>		
Students experience positive, trusting, consistent, and stable relationships with educators across and within all learning settings and environments.		
Students feel welcomed, respected, and valued by educators for their expertise, knowledge, backgrounds, and identities.		
Students are known and valued by each other and by educators.		
Educators respond to students’ specific needs, interests, readiness for learning, and opportunities for growth.		
Educators are attuned to the strengths, needs, and uniqueness of each student.		
Educators have established and support positive developmental relationships with individual students.		
Every student has positive developmental relationships with educators.		
<p> <b>Supporting Positive Developmental Relationships Among Staff—Example: <a href="#">Teacher Collaboration</a></b></p>		
Educators have structured time, opportunities, and support to work in interdisciplinary teams and collaborate with each other.		
Educators will take on leadership roles and engage in decision making on the policies and practices for learning settings and environments.		
Educators have opportunities to build positive staff culture and spirit and support individual and collective staff well-being.		

**Dimensions of the First Action Lens: Positive Developmental Relationships in Environments Filled With Safety and Belonging**

Indicator	Rating	Comments and Notes (Including Source Data)
 <b>Building Relationships With Families—Example: <a href="#">Parent-Teacher Home Visits</a></b>		
Families experience positive, trusting, consistent, and stable relationships with educators.		
Families feel welcomed, respected, and valued by educators for their expertise, knowledge, backgrounds, and identities.		
 <b>Building a Safe and Caring Learning Community—Example: <a href="#">Social Justice Humanitas</a></b>		
Educators and students codevelop shared values and norms for how to handle situations in their classroom to provide a sense of communal responsibility and support students in developing self- and social awareness, interpersonal skills, and empathy.		
Educators establish consistent routines across learning settings for students to reduce cognitive load and increase mental capacity for learning and community building.		
Schools foster empowering and inclusive learning environments that allow for all stakeholders, including students and families, to share input and/or perspectives that inform policies and practices for learning settings and environments.		
 <b>Developing Restorative Practices That Are Trauma-Informed and Healing-Oriented—Example: <a href="#">Lakewood Elementary School</a></b>		
Schools avoid zero-tolerance policies and practices. Instead, they employ restorative practices and other nonpunitive and supportive approaches to school safety and school discipline.		
Educators avoid zero-tolerance policies and practices. Instead, they employ restorative practices and other nonpunitive and supportive approaches to school safety and school discipline.		
School leaders ensure restorative and other supportive practices are implemented with quality <sup>5</sup> and that educators have the capacity to embody these principles in their teaching and classroom management.		



Dimensions of the First Action Lens: Positive Developmental Relationships in Environments Filled With Safety and Belonging

Indicator	Rating	Comments and Notes (Including Source Data)
 <b>Fostering Inclusive, Culturally Responsive Learning Environments—Example: <a href="#">Connecting to the Community Through the Arts</a></b>		
<p>Educators, students, and families collaborate to create learning environments that are explicitly anti-racist by identifying, examining, and eliminating policies and practices that perpetuate prejudice and disproportionately harm historically marginalized student groups.</p>		
<p>Educators and students identify how their own experiences and culture affect their attitudes and behaviors and how their biases, prejudices, beliefs, and behaviors affect others (<a href="#">e.g., Freedom Schools</a>).<sup>6</sup></p>		
<p>Educators and students value diversity and inclusion and respect others' cultures, sexual orientation, gender identities, heritages, and traditions.</p>		
<p>Schools and educators are culturally and linguistically competent and respect, value, affirm, and leverage student and family identities, heritages, traditions, and cultural knowledge.</p>		
<p>Schools and educators make curricular choices and create an environment that represents all students' backgrounds and identities.</p>		



## Action Lens 2: Rich Learning Experiences and Knowledge Development That Foster the Development of Skills, Mindsets, and Habits

Think about how the proposed program, policy, structure, and practices provide **rich learning experiences that foster the development of skills, mindsets, and habits**—specifically the extent to which each indicator is addressed. Using a scale of 1 to 5, rate your level of agreement that each indicator is addressed:

- 1: Not addressed
- 2: Partially addressed for some
- 3: Partially addressed for all
- 4: Fully addressed for some
- 5: Fully addressed for all

**What are rich learning experiences and knowledge development?** Rich learning experiences and knowledge development are pedagogical approaches, curricular designs, and assessment practices that enable students to understand material and disciplinary content and develop skills that will allow them, individually and collectively, to solve complex problems; communicate effectively; and, ultimately, manage or facilitate their own learning.

These experiences and opportunities include meaningful, engaging, and challenging work within and across core disciplines. Educators understand how students learn and support information processing by leveraging prior knowledge and cultural resources.<sup>7</sup> Educators use these approaches to scaffold future learning and help students engage with new content and learn new skills. They believe that all students can succeed and that they have an obligation to do all that they can individually and collectively to help them succeed. Educators ensure that every student experiences rich and challenging learning environments that provide robust conditions for learning and development, sustained opportunities to learn, and support students' agency and groundedness. Learning partnerships between and among educators and students cultivate experiences and opportunities for development that are personalized and engaging and reflect that each student is a unique individual and will follow their own distinct pathway toward goals for student learning and development. Two sets of factors that are key to student motivation and learning are (1) the nature of learning tasks and contexts and (2) educators' and students' beliefs about student strengths and capacity to grow and learn.




**Why are rich learning experiences and knowledge development important?** This kind of learning process can help students develop the executive functioning and metacognitive skills needed to become more self-directed learners. These skills are essential both for learning environments within school settings and for future college and career environments.

**What is the development of skills, habits, and mindsets?** Development of the types of skills, habits, and mindsets outlined in the playbook<sup>8</sup> foster social, emotional, and cognitive skills along with (1) content- and domain-specific knowledge and (2) mindsets that support growth, belonging, and a sense of purpose. Foundational skills (e.g., self-regulation, executive functions, self- and social awareness, and stress management) and mindsets (e.g., growth mindset, self-efficacy, and sense of belonging) lay the groundwork for higher-order skills and mindsets (e.g., agency, academic tenacity, curiosity). Development of productive skills, habits, and mindsets involves educators explicitly teaching, modeling, and reinforcing important skills and empowering students to practice these skills with growing independence. When these skills are practiced sufficiently to become habits, they support effective, productive, and engaged learning and the ability of learners to transfer their learning to new situations.



**Why is the development of these types of skills, habits, and mindsets important?** There are dynamic and inextricable links between social, emotional, and cognitive processes and development.

It is crucial for our education system to prioritize the development of the full set of skills that prepare young people to be engaged, motivated, self-directed learners, learning how to learn and the other skills and mindsets that truly prepare young people for lives of productivity, fulfillment, and choice. Focusing on the development of these skills among all learners is a huge factor in closing the gaps that young people who experience inequity of learning and life opportunity experience.


Dimensions of the Second Action Lens: Rich Learning Experiences and Knowledge Development That Foster the Development of Skills, Mindsets, and Habits

Indicator	Rating	Comments and Notes (Including Source Data)
<p>As a result of the proposed program, policy, structure, and practices, school leaders and educators in collaboration with students and families will design schools and learning settings and environments that will facilitate supporting diverse learners through universal design for learning, scaffolding for success, supporting effective inquiry and project-based learning, and culturally responsive pedagogy.</p>		
<p> <b>Supporting Diverse Learners Through Universal Design for Learning—Example: <a href="#">San Francisco International High School</a></b></p>		
<p>Educators support and empower students, individually and collectively, in their distinct journeys of learning and development by both personalizing individual learning and supporting collaborative learning and classroom or school-wide learning communities.</p>		
<p>Educators leverage students’ prior knowledge and interests, support multiple ways for students to engage in learning, and provide opportunities for students to use multiple tools and modes of expression.</p>		
<p> <b>Scaffolding for Success—Example: <a href="#">Formative Assessments</a></b></p>		
<p>Educators flexibly scaffold student learning and employ differentiating strategies to reach learning goals.</p>		
<p>Educators employ strengths-based approaches<sup>9</sup> to address students’ needs.</p>		
<p>Educators design motivating, engaging, and <a href="#">authentic activities</a> and tasks that leverage students’ individualized experiences, talents, and interests.</p>		
<p>Educators provide support to students when necessary to enable students to gain and practice complex and deeper learning skills.</p>		
<p> <b>Supporting Effective Inquiry and Project-Based Learning—Example: <a href="#">Pasadena Unified</a></b></p>		
<p>Educators create opportunities for students to regularly engage in project-based learning that incorporates setting goals, managing time and resources, and figuring out a learning process.</p>		

**Dimensions of the Second Action Lens: Rich Learning Experiences and Knowledge Development That Foster the Development of Skills, Mindsets, and Habits**

Indicator	Rating	Comments and Notes (Including Source Data)
Schools have processes for students and educators to receive timely and constructive feedback (formal and informal) and provide opportunities for students to reflect on and revise work. (e.g., <a href="#">Pasadena Unified School District</a> ).		
Educators use <a href="#">performance assessments</a> and rubrics focused on higher-order thinking skills and applications of knowledge and skills that reflect use in the real world ( <a href="#">see more about inquiry-based learning</a> ).		
Students engage in collaborative work ( <a href="#">see more about inquiry-based learning</a> ).		
 <b>Culturally Responsive Pedagogy—Example: <a href="#">UCLA Community School</a></b>		
Educators use <a href="#">culturally responsive pedagogy</a> and engage with students in ways that build upon students and others’ cultures, identities, knowledge, and experiences.		
School leaders and educators review, design, and employ curricula, instruction, and assessments to (1) promote robust learning and (2) ensure that they counter institutionalized privilege and prejudice. <sup>10</sup>		
 <b>Integrating Social, Emotional, and Cognitive Development Into Learning—Example: <a href="#">East Palo Alto Academy</a></b>		
Educators, students, and families collaboratively identify, define, and cultivate students’ skills, habits, and mindsets across curricula and in all learning settings.		
Educators receive direct, ongoing coaching and support to ensure meaningful engagement of students in developing skills, habits, and mindsets.		
School leaders have growth mindsets, set high expectations, and provide the necessary resources and supports to educators to ensure meaningful student engagement.		
Educators provide students, individually and collectively, with frequent opportunities and dedicated time to learn, use, and practice skills, habits, and mindsets during learning, instruction, and activities across all curricula and learning settings.		

Dimensions of the Second Action Lens: Rich Learning Experiences and Knowledge Development That Foster the Development of Skills, Mindsets, and Habits

Indicator	Rating	Comments and Notes (Including Source Data)
Educators foster and align content- and domain-specific learning (both academic and nonacademic) with integrated social, emotional, and cognitive skills, along with productive mindsets, across curricula and in all learning settings and environments.		
 <b>Developing Productive Habits and Mindsets—Example: <a href="#">Presumpscot Elementary School report</a></b>		
Educators cultivate students’ developing productive mindsets that support perseverance and academic resilience by offering opportunities for feedback and revision.		
Educators foster students’ executive functioning by engaging students in planning, organizing, problem-solving, and self-management activities, including projects and exhibitions of learning.		
Students have experiences to develop interpersonal and communication skills.		
Students have routine opportunities to collaborate with peers and to assess and describe their social, emotional, and academic learning.		
Educators encourage students’ development of reflective mindsets and skills that enable students to evaluate personal strengths, challenges, and progress toward goals.		
Educators promote students’ development of self- and social awareness of (1) the impacts of institutionalized racism and privilege on their attitudes, experiences, and opportunities and (2) how to counter them.		
Students have opportunities to develop compassionate and civic mindsets that encourage them to treat others with kindness, embrace different identities, and contribute positively to their communities.		



## Action Lens 3: Integrated Support Systems That Are Strengths-Based and Support Personalized and Collective Intervention

Think about how the proposed program, policy, structure, and practices build **ISS that are strengths-based and support personalized and collective intervention**—specifically the extent to which each indicator is addressed. Using a scale of 1 to 5, rate your level of agreement that each indicator is addressed:




- 1: Not addressed
- 2: Partially addressed for some
- 3: Partially addressed for all
- 4: Fully addressed for some
- 5: Fully addressed for all

**What is ISS?** ISS reinforces learning and learning environments by aligning and making available school and community resources for physical and mental health, social services, and expanded learning time that can be individualized to build upon the strengths and address the needs of every learner. Schools and educators integrate and leverage these resources and incorporate them into routine practices so that students' needs are readily identified and met holistically, without delays. The ISS should be strengths-based, culturally responsive, and promote equity. It should do this by addressing barriers to learning, customizing support, and focusing on engaging students and families, including those that have been disconnected, in a culturally competent, family- and youth-driven manner.<sup>11 12</sup>



**Why is ISS important?** ISS can mitigate barriers, enhance coping, strengthen resilience, help reduce the opportunity gaps, and support student achievement.

All students have unique assets and interests to build upon in their learning journeys. All students experience challenges that need to be addressed to propel their development and well-being. Educators must address students' challenges in individualized, strengths-based ways that do not result in stigma, shame, labeling, or segregation. Practitioners also have a shared developmental approach to thinking about students through a strengths-based lens that applies to student, family, and community assets. Orchestrating culturally responsive, integrated supports that systematically assess students' comprehensive needs and strengths and coordinate resources in a unified and collaborative way is essential.

**Dimensions of the Third Action Lens: Integrated Support Systems That Are Strengths-Based and Support Personalized and Collective Intervention**

Indicator	Rating	Comments and Notes (Including Source Data)
<p><b>As a result of the proposed program, policy, structure, and practices, school leaders and educators in collaboration with students and families can and will design schools and learning settings and environments that will facilitate creating comprehensive, multitiered systems of support that include assessing student strengths, challenges, and needs and providing universal, supplemental, and intensive supports and interventions.</b></p>		
<p> <b>Creating Comprehensive, Multitiered Systems of Support—Example: <a href="#">Center for Mental Health in Schools and Student/Learning Supports at UCLA</a></b></p>		
<p>School leaders and educators create and sustain ISS that include assessments and the implementation of <a href="#">universal</a>, <a href="#">supplemental</a>, and <a href="#">intensive</a> supports.</p>		
<p>ISS providers implement ISS in a manner that is individualized, consumer-driven, culturally and linguistic competent, and culturally responsive, strengths-based, and asset building and avoids stigma and labeling.</p>		
<p> <b>Assessing Student Strengths, Challenges, and Needs—Example: <a href="#">California’s CORE Districts</a></b></p>		
<p>Educators use tools to regularly assess students and provide insights into students’ individual strengths and struggles; patterns across grade levels and content areas; and school and community resources that should be accessed to meet individual and collective needs for programs and services.</p>		
<p>Educators collaborate to analyze data and identify effective interventions to support students while keeping a keen eye on those who have unique learning needs.</p>		
<p> <b>Creating Comprehensive, Multitiered Systems of Support: Providing Universal Supports—Example: <a href="#">Social Justice Humanitas Academy</a></b></p>		
<p>Educators provide universal supports to all students that include providing structures that support <a href="#">relationship-building</a>, <a href="#">collaboration</a>, <a href="#">culturally and linguistically responsive approaches</a>, and a <a href="#">shared understanding of development</a> among adults.</p>		

**Dimensions of the Third Action Lens: Integrated Support Systems That Are Strengths-Based and Support Personalized and Collective Intervention**

Indicator	Rating	Comments and Notes (Including Source Data)
 <b>Creating Comprehensive, Multitiered Systems of Support: Providing Supplemental Supports—Example: <a href="#">Gridley Unified School District</a></b>		
<p>Schools provide targeted supports to students through institutionalized practices, dedicated personnel, time, and practices such as high-quality, relationship-rich tutoring, and extended learning time.</p>		
 <b>Creating Comprehensive, Multitiered Systems of Support: Providing Intensive Supports and Interventions—Example: <a href="#">City Connects</a></b>		
<p>Schools have structures to coordinate, monitor, and improve intensive, individualized services including through partnerships, coordination of services, and regular check-ins.</p>		



## References

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<sup>1</sup> The Planning Tool has an explicit equity focus, including by emphasizing “robust equity” in language and practice. According to Osher et. al (2020), robust equity can be conceptualized as “the intentional counter to inequality, institutionalized privilege and prejudice, and systemic deficits and the intentional promotion of thriving across multiple domains for those who experience inequity and injustice.” Osher, D., Pittman, K., Young, J., Smith, H., Moroney, D., & Irby, M. (2020). *Thriving, robust equity, and transformative learning & development: A more powerful conceptualization of the contributors to youth success*. Forum for Youth Investment.

<https://forumfyi.org/knowledge-center/thriving-robust-equity-and-transformative-learning-development>

<sup>2</sup> This is an initial version of the Planning Tool, and the next phase of development is to pilot the tool with decision makers to determine feasibility and further refine the tool. Therefore, the tool does not have a set benchmark for determining if an investment or reallocation should be made. Additional piloting of the tool will help establish this benchmark.

<sup>3</sup> We acknowledge the applicability of the design principles and the underlying literature to out-of-school contexts in addition to school contexts; however, the scope of this tool is focused on educational settings.

<sup>4</sup> Osher, D., Cantor, P., Berg, J., Steyer, L., & Rose, T. (2020). Drivers of human development: How relationships and context shape learning and development. *Applied Developmental Science*, 24(1), 6–36. <https://doi.org/10.1080/10888691.2017.1398650>

<sup>5</sup> We are using quality rather than fidelity because it is important to both adapt evidence-based programs to specific contexts while ensuring the quality and spirit of the desired implementation. Osher, D., & Dymnicki, A. (2018). Chapter four: Selecting the right programs, strategies, and approaches. In D. Osher, D. Moroney, & S. Williamson (Eds.), *Creating safe, equitable, engaging schools: A comprehensive, evidence-based approach to supporting students* (pp. 51–60). Harvard Education Press.

<sup>6</sup> Frances, K., & Osher, D. (2018). Chapter six: The centrality of cultural competence and responsiveness. In D. Osher, D. Moroney, & S. Williamson (Eds.), *Creating safe, equitable, engaging schools: A comprehensive, evidence-based approach to supporting students`* (pp. 79–86). Harvard Education Press.

<sup>7</sup> Osher, D., Cantor, P., Berg, J., Steyer, L., & Rose, T. (2020). Drivers of human development: How relationships and context shape learning and development. *Applied Developmental Science*, 24(1), 6–36. <https://doi.org/10.1080/10888691.2017.1398650>

<sup>8</sup> All skills, mindsets, and habits are not healthy or equity-promoting. In this section, when we refer to skills, habits, and mindsets, we are specifically referring to those described in the playbook. For example, it is important to promote growth mindsets and avoid the development of fixed mindsets.

<sup>9</sup> Salinger, T., & Osher, D. (2018). Chapter nineteen: Academic interventions—use with care. In D. Osher, D. Moroney, & S. Williamson (Eds.), *Creating safe, equitable, engaging schools: A comprehensive, evidence-based approach to supporting students* (pp.235–252). Harvard Education Press.

<sup>10</sup> Alim, H. S., Paris, D., & Wong, C. P. (2020). Chapter 15: Culturally sustaining pedagogy: A critical framework for centering communities. In N. S. Nasir, C. D. Lee, R. Pea, & M. M. de Royston (Eds.), *Handbook of the Cultural Foundations of Learning*. (pp. 261–276). Routledge, Taylor & Francis Group.

<sup>11</sup> Frances, K., & Osher, D. (2018). Chapter six: The centrality of cultural competence and responsiveness. In D. Osher, D. Moroney, & S. Williamson (Eds.), *Creating safe, equitable, engaging schools: A comprehensive, evidence-based approach to supporting students* (pp. 79–86). Harvard Education Press.

<sup>12</sup> Wood, L., Osher, T., & Osher, D. (2018). Chapter eight: Partnering with families. In D. Osher, D. Moroney, & S. Williamson (Eds.), *Creating safe, equitable, engaging schools: A comprehensive, evidence-based approach to supporting students* (pp. 95–106). Harvard Education Press.

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