Goal Refinement Activity

CLC | PaTTAN I-MTSS Project | November 2026

Purpose and Directions

Purpose

Use the goals, ideas, and refinement questions from the June 3 breakout rooms to develop one final SMARTIE goal for each category. Each group will record the final goal, identify the evidence or measures that will be used to monitor progress, and document any unresolved decisions or information needs with a follow-up owner.

Activity Steps

1. Go to your assigned breakout room:
   - **Room 1:** Student Outcomes and Access
   - **Room 2:** Demonstration Site Processes
   - **Room 3:** Consultant Processes
   - **Room 4:** CLC Outcomes and System Support
   - **Room 5:** CLC Processes and Participation
2. **Review the ideas.** Identify the central priority.
3. **Use the refinement questions.** Clarify what the goal should address and measure.
4. **Sort the ideas.**
   - **Preserve:** Keep essential ideas for the goal.
   - **Combine, remove, or use as a measure:** Decide where other ideas belong.
   - **Rationale:** Note why.
5. **Draft one SMARTIE goal.** Focus on the central priority.
6. **Test and revise.** Use the eight criteria below.
7. **Complete the table.** Record the final goal, evidence or measures, and unresolved items with a follow-up owner.
   - **Specific:** Does the goal clearly state what will change or be accomplished, and who will act or experience the change?
   - **Measurable:** Does the goal include a target and identify evidence that can be used to monitor progress?

- **Achievable:** Is the goal realistic given the group's influence, available resources, and timeframe?
- **Relevant:** Does the goal address the most important priority in the category and support the intended outcomes?
- **Time-bound:** Does the goal identify when the result will be achieved or reviewed?
- **Inclusive:** Were the perspectives and needs of the people most affected considered when developing the goal?
- **Equitable:** Does the goal identify and address differences in access, participation, opportunity, or outcomes?
- **Clear:** Will different readers interpret the goal consistently?

Breakout Room 1: Student Outcomes and Access

Create one SMARTIE student outcome goal that identifies the most meaningful change for students across demonstration sites and explicitly addresses inclusion and equity.

Proposed goals and ideas from the breakout notes

- By fall of 2028, 100% of students in 90% of demonstration sites will participate in universal screening in SEB and at least one academic area, such as ELA or math.
- Establish processes that schools can use to provide universal screening for students for whom traditional assessments are not accessible, including students with sensory disabilities and low-incidence disabilities.
- PIMS data on the percentage of students with IEPs could be an indicator used to establish a student outcome goal across demonstration sites.

Refinement questions

- Is the intended student outcome participation in universal screening, a change in LRE data, or another result?
- Is universal screening participation a student outcome or evidence of site implementation?
- Which student groups currently experience differences in access to universal screening or related outcomes, and how should the goal reduce those differences?
- Which indicator is currently available and meaningful?
- What target and timeframe are realistic?

Preserve	Combine, remove, or use as a measure	Rationale	Potential Goal Elements

Evidence or measures:
Unresolved decisions, information needed, and follow-up owner:
Final SMARTIE goal:

Breakout Room 2: Demonstration-Site Processes

Create one SMARTIE demonstration-site process goal describing the actions sites must consistently implement to support the selected student outcome, including how the process will promote inclusive and equitable access.

Proposed goals and ideas from the breakout notes

- To achieve 100% of students participating in universal screening, demonstration sites will [do what] with [who] at [frequency], and we will know it is happening because authentic data will be collected for every child.
- Demonstration sites will establish a universal screening schedule, administer screenings to all students three times annually, and review screening data during monthly data-based decision-making meetings. Screening completion reports and student-level data will be available for every enrolled student.
- Each DSLT will have at least 67% of members, or their designees, attending each virtual meeting during the 2026-27 academic year.

Refinement questions

- Which site process is most essential to achieving the student outcome?
- Should the focus be screening implementation, DSLT participation, or a broader implementation process?
- Is DSLT attendance part of the goal or a supporting measure?
- Who is responsible, how frequently should the process occur, and what evidence will show it is happening?
- Whose access or participation could be limited by the proposed site process, and what adaptations are needed to make implementation inclusive and equitable?

Preserve	Combine, remove, or use as a measure	Rationale	Potential Goal Elements

Evidence or measures:			
Unresolved decisions, information needed, and follow-up owner:			
Final SMARTIE goal:			

Breakout Room 3: Consultant Processes

Create one SMARTIE consultant process goal describing how consultants will consistently support inclusive and equitable implementation across the demonstration sites.

Proposed goals and ideas from the breakout notes

- Consultants will apply guidance to demonstration sites and provide coaching to support implementation.
- By April 30, 2027, all consultants supporting the 13 I-MTSS sites will consistently use the term "Integrated Multi-Tiered System of Supports" in at least 95% of their verbal and written communications, as measured through frequency counts from reviewed work samples and documented observations of professional interactions.
- Develop checklists to vet public-facing materials and support consistent use of I-MTSS terminology across the state system.

Refinement questions

- What consultant practice would have the greatest effect on site implementation?
- Is consistent terminology the primary goal or one indicator of consistent consultant practice?
- What guidance should consultants apply?
- What coaching or support should consultants provide?
- How will consistency and influence on site implementation be measured?
- How will consultants ensure that guidance and coaching respond to differences in site context, student access, and implementation need?

Preserve	Combine, remove, or use as a measure	Rationale	Potential Goal Elements
Evidence or measures:			
Unresolved decisions, information needed, and follow-up owner:			
Final SMARTIE goal:			

Breakout Room 4: CLC Outcomes and System Support

Create one SMARTIE CLC outcome goal describing the result the CLC intends to achieve across the 13 Cohort 1 sites, including how progress will be examined across sites or student groups.

Proposed goals and ideas from the breakout notes

- The CLC will sustain I-MTSS implementation efforts in all 13 Cohort 1 sites participating in training and coaching events during the 2026-27 academic year.
- The CLC will establish processes and get guidance to consultants.

Refinement questions

- What does sustaining implementation look like in observable terms?
- Is continued participation sufficient, or should the goal require evidence of improved implementation?
- Which IMFR item or domain best represents the CLC's shared area of influence?
- What can the CLC reasonably influence across all 13 sites?
- What evidence would demonstrate progress beyond participation?
- How will the CLC determine whether progress is occurring equitably across the 13 sites rather than being driven by improvement in only some sites?

Preserve	Combine, remove, or use as a measure	Rationale	Potential Goal Elements
Evidence or measures:			
Unresolved decisions, information needed, and follow-up owner:			
Final SMARTIE goal:			

Breakout Room 5: CLC Processes and Participation

Create one SMARTIE CLC process goal describing the participation, representation, or operating condition needed for the CLC to accomplish its work inclusively and equitably.

Proposed goals and ideas from the breakout notes

- The CLC will have at least 67% of members, or their designees, attending each virtual meeting during the 2026-27 academic year.
- AIR could establish an ambitious but realistic goal based on attendance at the two baseline CLC events held on March 25 and June 3.

Refinement questions

- Is attendance the most meaningful measure of CLC participation?
- Should the goal address attendance, active contribution, completion of between-session work, or a combination?
- Should designees count toward continuity in the same way as standing members?
- What baseline supports an ambitious but realistic target?
- What documentation will be used to monitor progress?
- Whose perspectives may be missing from CLC participation, and what participation structures would support meaningful and equitable contribution?

Preserve	Combine, remove, or use as a measure	Rationale	Potential Goal Elements
Evidence or measures:			
Unresolved decisions, information needed, and follow-up owner:			
Final SMARTIE goal:			