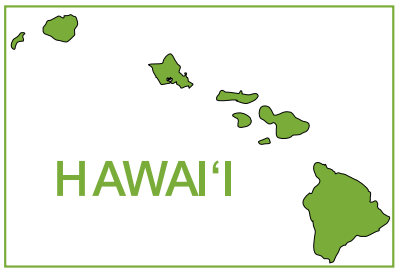
CLIENT/PARTNER SPOTLIGHT

Comprehensive Needs Assessments Help Schools Tell Full Story of Their Strengths and Opportunities

McREL's comprehensive school reviews take an asset-based, growth-oriented approach to analyzing a school's strengths, opportunities, and needs, providing schools with clear, practical recommendations on logical next steps to continue to improve.

McREL's school reviews include:

- ☑ Analysis of data (academic, attendance, etc.)
- ☑ Review of school goals, initiatives, and priorities
- ☑ Interviews with teachers, students, parents/caregivers, and leadership team
- ☑ Classroom observations
- ☑ Empowerment of school teams to review recommendations and select priorities to focus on first



McREL is a **state-approved provider** of comprehensive needs assessment in **Hawai'i** and is "approved with distinction" to conduct School Holistic Reviews and Improvement Planning in **Colorado**.

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Comprehensive Needs Assessments Can Provide Valuable Insights

For many principals and school leadership teams, the thought of inviting an external evaluator to perform a comprehensive needs assessment (CNA) of their school can stir up a mix of emotions from anxiety to excitement. Many wonder, "How can an outsider really understand the complex interworking of my school? How can they pass judgment on our work after just a few days, and then tell us what we have to do?" However, with the right partnership, a CNA—also known as a holistic school review—doesn't have to be a negative experience. Instead, it can provide valuable insights on a school's existing strengths and elevate improvement opportunities that can be difficult for a school team to discover on its own due to limited time and capacity, competing priorities, or inherent biases.

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CNAs have become a common component of many school improvement initiatives across the country, although there's variance from state to state as to what the reviews are called, how often they're required, and what is involved.

"Most schools, if not all, are in need of some continuous improvement effort, and some more than others—and as long as states continue to have accountability systems that identify their lowest-performing schools, we're going to continue to need these external reviews," explained Dale Lewis, McREL vice president of large programs.

At its core, a CNA is looking to tell the most complete story of a school—where the school has been, where it is now, and where it's going, all with an objective lens, said Kristin Rouleau, McREL's vice president of learning services.

During a CNA review, McREL's team of researchers and expert consultants (who are former educators and school/district leaders themselves) gathers information about the school's performance, culture and climate, instructional leadership, and educator talent development, and analyzes how these elements are meeting the needs of students, families, staff, and leaders.

"I highly value having an outsider's perspective, somebody who's not entrenched in the day-to-day goings on of the school," said Adria Medeiros, principal of Mountain View Elementary School in Hawai'i, which had McREL conduct a CNA in 2024. "If you're considering doing a CNA, just do it. It's feedback. We need it. We're all very biased [about our own schools], and it takes the biases out."

Effective external partners recognize their role as a guest within a school community and work early in the process to build relationships and trust. "It's a partnership," said Rouleau. "We review data of course, but to better understand a school's context, its vision and goals, its bright spots, and its areas of opportunity for growth, we have to also hear from staff, students, parents, and the whole community. We're visitors, and we need their insights."

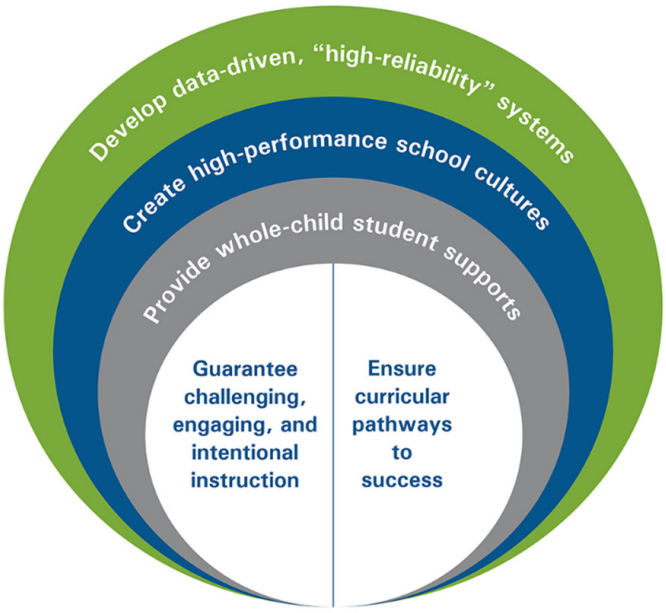
An Asset-Based Approach to School Reviews

Rather than coming in as declared experts bringing external solutions, McREL's school review team approaches CNAs with a curiosity and growth mindset.

"We're curious about what students are experiencing and how teachers are perceiving it," said Lewis. "We believe that no matter how low performing a school might be, there are bright spots that exist. So, let's find those, celebrate them, and identify ways to leverage them—scaling them up into improvement efforts that can positively impact more students and staff."

Data Collection Aligned With What Matters Most for Student Success

McREL's What Matters Most® Framework



The data collection process follows McREL's research-based What Matters Most® framework, which identifies five high-leverage, high-payoff areas that have positive effects on student success. With the framework guiding the school review, data collection generally follows three steps—pre-visit orientation and planning, site visit, and feedback and reporting.

Pre-visit orientation and planning

Before review teams set foot in the school, McREL begins collecting feedback from a wide range of stakeholders

covering a variety of topics. This starts with the pre-visit orientation and planning to build foundational knowledge. A What Matters Most survey is administered to all staff, and the McREL team reviews school-provided and publicly available documents and conducts preliminary data analysis.

Site visit

Continuing data collection on site, the McREL team conducts a variety of in-person activities: classroom visits; a whole staff collaborative assessment (WSCA); and focus groups of students, teachers, school leaders, parents and other caregivers, and the community.

Common Elements of a CNA

- ⇨ Analysis of data: academic performance, attendance, publicly available school documents, etc.
- ⇨ Review of school goals, improvement initiatives, and instructional priorities
- ⇨ Interviews with teachers, students, parents/caregivers, and leadership team
- ⇨ Classroom observations

"The reason to go with McREL is how comprehensive it really is," said Medeiros. "They got into every classroom to do observations, and the focus group interviews really encompassed a good reflection of the whole school."

During classroom visits, McREL staff observe as many classes in the school as they can, looking at things like teaching practices, student engagement, and student behavior. This is where mutual trust and respect among the school staff and external partners are crucial.

"I would never have somebody just come in from the outside and do what she's able to do. I wouldn't have that trust," said Superintendent Mike Jobman of Deer Trail Schools in Colorado, of his relationship with McREL consultant Cheryl Abla, who has conducted a CNA and worked on site with the district for the past five years. "I feel like she's an extension of my team, which doesn't happen overnight. It takes time and effort on her part to build those relationships and that trust. Our staff's excited when she comes in the door."

When school staff trust the review team, conversations can flow more freely, helping the reviewers gain valuable information needed to tell a more complete story about the school's strengths and needs.

The WSCA is a group activity that focuses on specific practices aligned with the What Matters Most framework. Findings from the discussion help the review team gain understanding about what matters most right now to improve student outcomes, and they can begin to develop recommended action steps aligned to the school's specific contexts. It's a deep dive and uncovers many intricacies within a school. For example, during a recent collaborative assessment, the review team learned that a school's math department had adopted consistent materials and assessments, however, other departments had not done so, and teachers said they didn't know what their colleagues were using or teaching. "Insights like this allow us to say, 'There are some great things happening in your school, and there are some opportunities,'" said Rouleau.

This feedback can be particularly helpful to cut through the noise and provide clarity for schools grappling with an overwhelming volume of initiatives and programs. "It's challenging to do, but we really try to help schools pare down the number of improvement initiatives they're trying to simultaneously accomplish or, at a minimum, look for a way in which more coherence can be brought to those so that they're not viewed as separate, disconnected initiatives," Lewis stated.

Feedback and reporting

At the close of the on-site visit, the review team organizes their observations and presents a high-level summary of initial impressions of the school's strengths, weaknesses, opportunities, and threats (SWOT) with the full staff to hear their feedback. "We talk about our observations, rather than our findings, and we ask about what we missed. We don't come in to hit you over the head and tell you everything is wrong in your school or tell you what to fix," said Rouleau. "We'll say, 'Here's a strength, but here's an opportunity; and here's a threat or challenge.'"

Sometimes weaknesses might be hard to hear—for example, when the evaluation team tells a school staff that they didn't observe a whole lot of urgency for teaching and learning—but because they're presented in context with strengths and opportunities, people tend to be more open to them, shared Rouleau. And sometimes a weakness isn't necessarily about what people are or are not doing. For example, in a Hawai'i school, teachers were using adopted instructional materials (a strength), but the lessons and units weren't culturally relevant to their students (a weakness) because the textbooks were written for mainland students, so teachers needed to adapt the materials to make them culturally relevant (an opportunity).

Again, establishing trust early goes a long way toward being able to provide analysis and recommendations that are received as authentic and helpful, even when they can be perceived as challenging.

"We've had other companies do diagnostic reviews, and when they left, we felt like we had been grilled to the third degree, and there was no value in anything that they had done. There was no trust built," said Jobman. "Cheryl and McREL have definitely changed my tune. They'll share honest feedback that may be hard for us to hear, but we know that they genuinely care about what they do and care about our kids and staff. It's all about finding that person who builds those relationships."

Empowering School Teams to Prioritize McREL's Recommendations

Typically, a McREL comprehensive needs assessment for a school will result in 3–5 recommendations for each of the five What Matters Most components, for a total of 15–25 recommendations. The recommendations point toward logical next steps a school can take to continue to improve, said Rouleau. They are hefty lifts, too numerous to all be accomplished in a single school year. So McREL empowers school teams to review and prioritize the recommendations, choosing for themselves what to focus on first.

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"If we've got 80% of the school's faculty on board with the priorities they've identified and are committed to, I think that's a success," said Lewis. "We make recommendations, but ultimately it's the teachers, leaders, and support staff who are instrumental in ensuring that something meaningful happens post review. They've got to carry that torch."

The recommendations often help principals and leadership teams write their school improvement plans. "I'm excited for next year, because we've taken the CNA data and developed our school's 30-60-90-day academic plan from it. We're all on the same page now," said Medeiros. "McREL gave us robust data and gave everybody an opportunity to contribute and give feedback. Everybody is represented. The goals are deep, and they're going to make an impact. We were able to achieve a greater depth than had we done it on our own, thanks to the help of Kris [Rouleau] through the CNA process."

Fostering Long-Term Relationships

At the end of the process, it all comes down to partners who are willing to go the extra mile. The initial on-site visit might only last a few days, but an effective CNA should be the beginning of a school improvement journey. "If we do our job well, we're focused on building deep relationships with people, doing the right kind of work, holding ourselves accountable in that process, and ensuring that we are honoring local context in the recommendations we arrive at in a collaborative way," said Lewis.

An important goal for the partnership is to end the process with the school staff and leadership feeling validated and excited to carry the work forward. "When we first started working with McREL, I was a school principal, and I was the most 'anti' person on the staff about bringing someone in," explained Jobman. "Then I gave Cheryl a chance and built a relationship with her. And now I couldn't imagine running my buildings without having her come in two, three, or four days a month."

For Medeiros and her school team, there's a similar feeling about Rouleau, who conducted their CNA and continues to support the school. "I have nothing but positive things to say. Kris and her team made everybody feel very comfortable. She made it evident that she was here to help us and to support us, and my staff took very well to her. I very much appreciate and respect her, and she's brilliant."

"This is absolutely the most gratifying work," said Rouleau. "I am proud that the way we approach this work has made us approachable. The schools have wanted to continue to work with us because we put the relationship first, honor local context, and exercise humble expertise." ■

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McREL INTERNATIONAL
800.858.6830 • info@mcrel.org • www.mcrel.org

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