



# CONDITIONS FOR SUCCESSFUL PROJECTS (CSPs) FULL SELF ASSESSMENT

A Tool to Help Individuals and Organizations  
Plan Projects to Increase the Likelihood of  
Successful Implementation



## Conditions for Successful Projects (CSPs)

# Buy-in From Collaborators

Explicit and active engagement from all collaborators ensures the project has maximum support and access to necessary resources.

1

### Understand

Each condition is described in detail to demonstrate how it is connected to project success. You will learn why the condition is important, how to assess your status within the condition, how to document your current condition, and how to use this information to develop a project plan.

2

### Reflect

Once you understand the value of each condition, we invite you to reflect on how your project fares on the rating scale. During this reflection, consider what evidence supports your rating and if you are where you want to be. If not, what would it take to move across the continuum? We offer a self-assessment worksheet for each condition. Additionally, if you are having trouble determining your current state, we have a resource library to help you.

3

### Act

Once you identify your current state and determine what to change, you are ready to add your next steps to your project plan. In the future, the CSPs can serve as a checkpoint to help you maximize your project's likelihood of success. Review your CSP work regularly to determine if you have improved your condition ratings and see if those changes have helped move your project forward. Write down your action steps in the table.

### Before You Begin...

- » List all interested parties/groups. Include both direct and indirect for the entire education delivery chain impacted by the project and involved in achieving desired outcomes
- » Research evidence-based practices that might apply to your project's goals
- » Scan for relevant policies/legislation that may influence project implementation

1

## Understand

### Charting Your Course: Navigating from Present Position to Future Destination

In any project, one individual's influence can significantly steer its progress. Securing buy-in from collaborators ensures there are more project champions and fewer roadblocks. As you work through this condition, you might realize several key collaborators are not currently involved in the potential project. That's okay! Even with only 50 percent participation, it's not a roadblock but an opportunity to strategize.



Use your assessment of buy-in from collaborators to guide your action steps. For example:

- » If only 50 percent of interested parties are committed, what can you do to engage the other 50 percent? Is it a matter of informing them?
- » Does the project need to be adjusted to gain their support? When facing an unengaged collaborator, explore ways to address their concerns.



You can also use this as a checkpoint during implementation.

- » Are the collaborators still committed to the project goals?
- » Has the situation changed regarding adjustments in the project plan to address evolving collaborator needs and priorities?

### Building Your Case: Gathering Evidence for Your Current Position

#### STEP 1

List every interested party. Knowing who has a vested interest in the project's success is important.

- » Who are the interested parties?
- » Who will benefit from the project?
- » Who may not benefit directly but will still be involved in implementation?
- » Are there policymakers or organization leaders who are interested in the outcomes this project might yield?

#### STEP 2

Once you have a list of interested parties, assess their knowledge level and commitment to the potential project.

- » Who are your biggest champions?
- » Where can you find documentation for this buy-in?



2

## Reflect

### Guiding Questions for Reflection

- » What evidence suggests collaborators at all levels will actively support the project, including changing their behaviors and practices as needed?
- » Are there interested parties or collaborator groups that hold more power? Are some collaborators more influential than others (e.g., gatekeepers or cultural brokers)? Why?

### State of the Project

Rate the current state of the project:			
Emerging	Developing	Advancing	Mastery
No evidence of collaborator buy-in documented	50% of collaborator buy-in documented	75% of collaborator buy-in documented	100% of collaborator buy-in documented

Reflection/Evidence:



#### Potential Evidence Sources

Meeting notes, emails, written agreements, survey results, collaborator analyses, and asset maps



#### Supporting Tools/Resources:

- » [Collaborator Buy-In Tool](#)
- » [Project Management Institute Collaborator Analysis](#)

3

## Act

### Guiding Questions for Action Planning

What other conversations can you have to move along the continuum?

- » What opportunities are available to engage potential collaborators interested in this project?
- » How can the team better leverage the interested groups that hold more power and influence in service of achieving project goals?
- » After completing this reflection and self-assessment, what meetings and conversations need to happen immediately to improve collaborator buy-in?
- » Who needs to be informed or consulted before implementing the proposed actions?
- » How can collaboration and communication be strengthened within the team during the implementation of actions?
- » Are there specific milestones or checkpoints to track progress and make necessary adjustments? For example, a target date to onboard a new collaborator or creating outreach materials to share.
- » How will success be measured to evaluate the effectiveness of the actions taken?

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Action Plan:

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## Conditions for Successful Projects (CSPs)

# Continuous Improvement

A clearly defined plan to capture, analyze, and act on quality data related to implementation and outcome attainment promotes continuous improvement.

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## Understand

### Charting Your Course: Navigating from Present Position to Future Destination

How do you plan to monitor project implementation and ensure progress toward your goals? A continuous improvement plan provides checkpoints for assessing progress and making necessary adjustments. To do this effectively, high-quality, reliable implementation and outcome data should be routinely available for the team to review, analyze, and act upon. This involves two key components: data access and data review.



#### Data Access

- » If the needed data isn't currently available or the connection between available data and project outcomes is unclear, there's an opportunity to find better information and establish more explicit connections.
- » Is the required data collected but not accessible? If so, how can access be regularly facilitated for project team collaborators?
- » If the data hasn't been collected yet, is there a different source that can provide needed information? Or can a data collection procedure be established as part of the project plan?



#### Data Review

- » While accessing data is crucial, it's equally essential for team members to know how to review it. They should be able to identify successes and determine action steps to support the project's goals.
- » Have relevant parties been adequately trained for data review?
- » Are there regular meetings to discuss project progress and review the data?
- » What are the expectations when data review identifies new challenges or implementation issues?

### Building Your Case: Gathering Evidence for Your Current Position

Document your continuous improvement process with as much detail as possible.

Once you've gathered and assessed the evidence, use the following scale to identify your current position. Remember that this rating is a benchmark, not a fixed position. If you find yourself at the Emerging stage, don't worry. You now have a clearer understanding of the steps needed to progress toward the advanced stage.

2

## Reflect

### Guiding Questions for Reflection

- » Are there measures in place to track project implementation? If not, can meaningful measures be developed and used?
- » Is there a plan to define, assess, and continuously improve data quality around implementation and outcome data?
- » Are systems and staff available to operationalize continuous improvement, or can quality data collection and cycles of continuous improvement be included in the project plan?

### State of the Project

Rate the current state of the project:

**Emerging**

No data or the ability to include data collection regarding implementation and/or outcomes exists

**Developing**

There is some data available around implementation and/or outcomes, but the quality is uncertain, and the connection between the two is not clear

**Advancing**

There is data available around implementation and outcomes, and a plan to improve the quality and regular reporting and analysis exists

**Mastery**

There is high-quality, reliable implementation and outcome data routinely available for project team collaborators to review, analyze, and act upon for continuous improvement

Reflection/Evidence:



Potential Evidence Sources

Completed CSP rubric, outputs from consensus-building workshops, continuous improvement team in place, continuous improvement plan/cycle documented



Supporting Tools/Resources:

- » [DMAIC: The 5 Phases of Lean Six Sigma](#)



3

## Act

### Guiding Questions for Action Planning

What other conversations can you have to move along the continuum?

- » What are the immediate needs to improve data quality and availability?
- » How do you plan to address data gaps?
- » What steps can you take to establish regular reporting and analysis if it does not currently occur?
- » What training exists to teach collaborators to effectively review, analyze, and act upon data for continuous improvement?

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Action Plan:

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## Conditions for Successful Projects (CSPs)

# Driving Forces

Driving forces are identified and maximized to address the need and support project implementation.

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## Understand

### Charting Your Course: Navigating from Present Position to Future Destination

Various external forces can drive a project. For instance, new legislation with an approaching implementation deadline might lead organizational leadership to prioritize a project. Similarly, a significant news event could increase scrutiny of a program or location. Maximizing the effect of these driving forces is crucial for the project's benefit.

- » Is there a way to create one if there are no driving forces?
- » If there are driving forces, is your project taking full advantage of related opportunities, resources, and/or collaborator focus to propel the project forward?
- » This condition is closely tied to [Collaborator Buy-in](#).

### Building Your Case: Gathering Evidence for Your Current Position

Driving forces are frequently linked to policy changes and leadership directives. Funding opportunities, like grants or contracts, can create a valuable sense of urgency that boosts collaborator commitment. Document these driving forces by conducting a policy scan, examining legislation text, tracking legislative committee updates, and reviewing organizational leaders' testimony to legislative bodies. Additionally, pay attention to organizational leaders' public comments and relevant strategic plans and funding opportunities.

Once you've gathered and assessed the evidence, use the following scale to identify your current position. Remember that this rating is a benchmark, not a fixed position. If you find yourself at the Emerging stage, don't worry. You now have a clearer understanding of the steps needed to progress toward the advanced stage.

2

## Reflect

### Guiding Questions for Reflection

- » What is the biggest driver to address the need?
- » Is the primary driver expected to change during the project period?
- » Is there a reasonable timeline associated with the driving force(s) (e.g., required report to legislature by a specific date)?

### State of the Project

Rate the current state of the project:

#### Emerging

No driving forces exist to address the need

#### Developing

Driving forces to address the need are in development

#### Advancing

Driving forces to address the need are in the initial implementation stages

#### Mastery

Driving forces to address the need are fully implemented and support the project

Reflection/Evidence:



#### Potential Evidence Sources

Policy scan, legislation text, legislative committee updates, SEA testimony to legislation, SEA leader public comments, state strategic plan, funding opportunity, current context, new data analysis



#### Supporting Tools/ Resources:

- » [Force Field Analysis Tool](#)



3

## Act

### Guiding Questions for Action Planning

What other conversations can you have to move along the continuum?

- » Identify the earliest communication touchpoint to have a formal, structured brainstorming session to identify the driving and restraining forces that will impact how well your desired change will work.
- » After reviewing ideas from the Potential Evidence Sources above, are there any opportunities to create driving forces?
- » Are there ways to change the timelines associated with driving forces to support this project better?
- » How can associated collaborators better leverage the driving forces?
- » Is there a plan to accommodate changes to identified driving forces (for example, changes in policies or legislation) that may disrupt the original project goals or timeline?
- » Have you, as part of your internal project communications plan, identified opportunities to share the driving forces for this project as a way also to get buy-in from collaborators?

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Action Plan:

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Conditions for Successful Projects (CSPs)

# Evidence-based Practices and/or Precedent Availability

Relevant evidence-based or research-based practices are identified and applied to meet the need, and/or a precedent for successful implementation to exist.

1

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## Understand

### Charting Your Course: Navigating from Present Position to Future Destination

Implementing research-based practices is ideal because there is available evidence to suggest a successful outcome. There are two components to consider. First, identifying research-based practices supports the project's goals and aligns with the project's content (e.g., student demographics). Second, applying the practice with fidelity increases the likelihood of replicating outcomes.

However, research-based practices are not always available or matched to a project's context. That does not mean the project is going to fail. The key is to search for the best available evidence to support the project's theory of change. If no such practices are identified, map out your theory of change (e.g., create a logic model) to ensure your actions are specifically targeted to your goals and likely to support the desired outcomes.

### Building Your Case: Gathering Evidence for Your Current Position

There are many ways to search for research-based practices. The standard in education is the What Works Clearinghouse. You can also search research reports and look for examples in other states to see what evidence base guided their project planning. A logic model that includes a working theory of action or logic model samples can help you work through how the project is designed to yield specific outcomes.

Once you've gathered and assessed the evidence, use the following scale to identify your current position. Remember that this rating is a benchmark, not a fixed position. If you find yourself at the Emerging stage, don't worry. You now have a clearer understanding of the steps needed to progress toward the advanced stage.

2

## Reflect

### Guiding Questions for Reflection


- » Has research been done about practices relevant to this issue?
- » Can practical examples or successful precedents be transferred, translated, or adapted here?
- » How might the context inform the practice or intervention’s adaptation (surface vs. core)?

### State of the Project

Rate the current state of the project:

Emerging	Developing	Advancing	Mastery
No relevant practices or examples can be applied	At least one practice or example has been identified, but the application is not a good/great match for the context	At least one practice or example has been identified, but there are application challenges to consider	At least one practice or example has been identified and is ready for application

Reflection/Evidence:



**Potential Evidence Sources**

What Works Clearinghouse, research reports, examples in other states, logic model that includes a working theory of action or logic model samples, asset map



**Supporting Tools/Resources:**

- » [ESSA Tiers of Evidence: What You Need to Know](#)
- » [Logic Model Template](#)



3

## Act

### Guiding Questions for Action Planning

What other conversations can you have to move along the continuum?

- » Have you conducted a thorough scan of evidence-based practices through existing education-related databases such as the What Works Clearinghouse?
- » Have you conducted a literature review to determine what research base supports your theory of action?
- » How can you create or edit a theory of action to best represent the evidence-based practices that apply to your project?
- » If evidence-based practices do not support your project plan currently, what are some ways in which you are working to identify a practice that supports the project needs?
- » Have you been able to connect with those who have implemented the evidence-based practice you are considering, to learn any application challenges that might need to be considered based on changes in context?
- » Are you aware of and have been able to connect with federally funded technical assistance centers (OESE Technical Assistance Centers - Office of Elementary and Secondary Education, as one example) that might be able to share information around evidence-based practices to support the project (if applicable)?

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Action Plan:

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## Conditions for Successful Projects (CSPs)

# Evidence of Likely Sustainable Change

The project's vision or goal(s) are well-defined and likely to result in sustainable change related to education outcomes in 3-5 years and beyond.

1

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## Understand

### **Charting Your Course: Navigating from Present Position to Future Destination**

A successful project needs clear goals, a detailed plan, and adequate resources to ensure successful implementation. It should also focus on how each action is tied to desired outcomes and how they will be sustained over time. A common misconception is that a project should be near completion before considering how to sustain the changes. Yet sustainability requires careful attention and planning, especially when considering the commitment and application of resources. Before you begin implementation, consider how these pieces fit together and if they seem likely to improve education outcomes in the next 3-5 years.

### **Building Your Case: Gathering Evidence for Your Current Position**

If funding for this project disappeared, what would be left behind? Consider ways your project will sustain to achieve its targeted long-term outcomes. Organizations are subject to many disruptions and changes: staffing turnover, leadership changes, shifting priorities, etc. Your project should be built to last in service of its goals.

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2

## Reflect

### Guiding Questions for Reflection

- » What does project success look like?
- » What capacities must be increased or achieved to sustain the work?

### State of the Project

Rate the current state of the project:

#### Emerging

There is no evidence of a clear goal or a plan to sustain the work

#### Developing

There is some evidence of developing a goal and plan to sustain the work

#### Advancing

There may be a clear goal and plan to sustain the work, but the project lacks the necessary resources to operationalize the plan

#### Mastery

There is a clear goal, plan, and adequate resources to sustain the work beyond this project's timeline

Reflection/Evidence:



#### Potential Evidence Sources

Conversations with project leadership, conversations with collaborators, policy reports, news articles, revised theory of action



#### Supporting Tools/Resources:

- » [Sustainability Planning Tools](#)

3

## Act

### Guiding Questions for Action Planning

What other conversations can you have to move along the continuum?

- » How can you document sustainability plans?
- » Have you shared information about the project's future direction with all collaborators to identify and remediate any concerns that might be shared as a result of that?
- » Is there an opportunity to plan for a pilot within the project so you can capture lessons learned on a smaller scale?
- » Does the pilot data share any considerations for planning the project differently to ensure broader scale and sustainability?
- » Who must be involved to ensure all collaborators adopt the plans?
- » Are there opportunities to refine the goals further to support sustainability planning?

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## Conditions for Successful Projects (CSPs)

# Increasing Opportunities

The outcomes of this project are explicitly stated, endorsed by relevant parties, and tied to increasing student opportunities.

1

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## Understand

### **Charting Your Course: Navigating from Present Position to Future Destination**

Projects in the education field should scale up evidence-based practices to increase opportunities and outcomes for students. However, it is important to identify and state HOW the project is working toward that goal. Have relevant parties specifically discussed how the project enhances students' opportunities? If so, is this clearly reflected in the project plan? Are there constraints to consider, and how will those be addressed during project implementation?

### **Building Your Case: Gathering Evidence for Your Current Position**

Identify sources where equal access to opportunities is intentionally written. Consider how this is represented in a logic model, theory of change, project plan, vision, mission, goals, project reports, etc.

Once you've gathered and assessed the evidence, use the following scale to identify your current position. Remember that this rating is a benchmark, not a fixed position. If you find yourself at the Emerging stage, don't worry. You now have a clearer understanding of the steps needed to progress toward the advanced stage.

2

## Reflect

### Guiding Questions for Reflection

- » What would increasing all students' access to opportunities look like in this project?
- » What are some barriers to all students accessing opportunities emerging from this project?
- » Who is not currently accessing opportunities or is accessing them at a lower rate? Are their voices present as collaborators in the initiative?

### State of the Project

Rate the current state of the project:

#### Emerging

The project partners have not discussed ways in which the project enhances students' opportunities

#### Developing

The project plan does not clearly articulate how the planned activities increase students' access to opportunities

#### Advancing

The project plan clearly articulates the activities to increase opportunities through the delivery chain; however, there are important constraints that need to be addressed

#### Mastery

There is evidence that the constraints can be resolved, and the increased access to opportunities allows the project collaborators to independently engage in new opportunities

Reflection/Evidence:



#### Potential Evidence Sources

Equal access to opportunities objectives stated in project outcomes



#### Supporting Tools/Resources:

- » [Equity Audit Considerations](#)



3

## Act

### Guiding Questions for Action Planning

What other conversations can you have to move along the continuum?

- » How can more conversations be facilitated with project partners to identify ways the project could enhance students' opportunities?
- » How can the project plan be augmented to best represent how planned activities increase students' access to opportunities?
- » Are there ways in which you can understand the needs students might have as they relate to this project and identify ways in which those could be incorporated within the project plan?
- » How can identified constraints be resolved?

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## Conditions for Successful Projects (CSPs)

# Mitigate Restraining Forces

Identify restraining forces and develop a plan to mitigate their influence as much as possible.

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## **Understand**

### **Charting Your Course: Navigating from Present Position to Future Destination**

Unlike driving forces, restraining forces can impede project progress and even halt implementation. Early identification is crucial for devising mitigation strategies to keep the project on track. Proactive communication and securing collaborator buy-in are essential, as collaborators are motivated to intervene and counteract restraining forces. Assess the severity of these forces—are they inconvenient but manageable, or significant roadblocks that could significantly slow down or halt the project? Determine how relevant parties can be strategically deployed to advocate for the project’s success in the face of restraining forces.

### **Building Your Case: Gathering Evidence for Your Current Position**

Assess the project context for potential restraining forces by examining competing organizational priorities that may overlap in resource usage. Document potential conflicts that could arise from these overlaps. Evaluate the priorities of interested parties who may not be fully invested in the project’s outcomes and identify possible points of contention. This proactive evaluation helps anticipate and address potential obstacles before they impede project progress.

Once you’ve gathered and assessed the evidence, use the following scale to identify your current position. Remember that this rating is a benchmark, not a fixed position. If you find yourself at the Emerging stage, don’t worry. You now have a clearer understanding of the steps needed to progress toward the advanced stage.



2

## Reflect

### Guiding Questions for Reflection

- » Does the client have the capability to do the work right now? If not, what do they need to increase capability?
- » Do we have the influence and resources to mitigate restraining forces with collaborators in the delivery chain?
- » Can driving forces be leveraged to mitigate any restraining forces?

### State of the Project

Rate the current state of the project:

#### Emerging

The key project collaborators are unable to mitigate restraining forces

#### Developing

The key project collaborators are mostly unable to mitigate restraining forces

#### Advancing

The key project collaborators are mostly able to mitigate restraining forces

#### Mastery

The key project collaborators are fully able to minimize all restraining forces

Reflection/Evidence:



#### Potential Evidence Sources

Client meetings, collaborator meetings, relevant resources



#### Supporting Tools/Resources:

- » [Force Field Analysis Tool](#)



3

## Act

### Guiding Questions for Action Planning

What other conversations can you have to move along the continuum?

- » What obstacles prevent the mitigation of restraining forces? Are there any conversations that can address some or all of these obstacles?
- » Are there individuals within your larger organization or at other similar organizations who might have worked on a similar project and can share insight as to how they might have mitigated similar restraining forces?
- » Are there individuals who are not currently involved in the project who can support mitigating restraining forces? What would it take to get them involved?
- » If there is no current capacity to implement the project, what is needed to increase capacity?

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Action Plan:

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## Conditions for Successful Projects (CSPs)

# Resource Commitment

Adequate resources (e.g., human, organizational, resource, policy) are identified and will be committed to implementing solutions to improve outcomes.

1

### Understand

Each condition is described in detail to demonstrate how it is connected to project success. You will learn why the condition is important, how to assess your status within the condition, how to document your current condition, and how to use this information to develop a project plan.

2

### Reflect

Once you understand the value of each condition, we invite you to reflect on how your project fares on the rating scale. During this reflection, consider what evidence supports your rating and if you are where you want to be. If not, what would it take to move across the continuum? We offer a self-assessment worksheet for each condition. Additionally, if you are having trouble determining your current state, we have a resource library to help you.

3

### Act

Once you identify your current state and determine what to change, you are ready to add your next steps to your project plan. In the future, the CSPs can serve as a checkpoint to help you maximize your project's likelihood of success. Review your CSP work regularly to determine if you have improved your condition ratings and see if those changes have helped move your project forward. Write down your action steps in the table.

### Before You Begin...

- » List all interested parties/groups. Include both direct and indirect for the entire education delivery chain impacted by the project and involved in achieving desired outcomes
- » Research evidence-based practices that might apply to your project's goals
- » Scan for relevant policies/legislation that may influence project implementation

1

## **Understand**

### **Charting Your Course: Navigating from Present Position to Future Destination**

A great idea alone won't make a project succeed. It needs the right resources, money, people, organizational support, partnerships, spaces, and good communication. Start by figuring out what the project needs. Then, see how much of these resources are committed and by whom. This helps pinpoint where planning needs to focus to fill any gaps.

### **Building Your Case: Gathering Evidence for Your Current Position**

Conduct a detailed analysis of available staff, funding, policies, and organizational charts to assess resource gaps. Pay close attention to what gaps still need to be addressed and identify collaborators who can provide support.

Once you've gathered and assessed the evidence, use the following scale to identify your current position. Remember that this rating is a benchmark, not a fixed position. If you find yourself at the Emerging stage, don't worry. You now have a clearer understanding of the steps needed to progress toward the advanced stage.



2

## Reflect

### Guiding Questions for Reflection

- » What are partners willing to commit to this project? Examples: staff time, visible leadership support, access to resources, adjusting policies, etc.
- » What are partners unwilling to commit to?

### State of the Project

Rate the current state of the project:			
Emerging	Developing	Advancing	Mastery
There is no evidence in the project plan that outlines the number of resources needed to implement the project with fidelity	There is evidence in the project plan that the partners have identified 50% of resources committed, but they might be available for an insufficient amount of time to improve outcomes	There is evidence in the project plan that 75% of the resources can be committed but might be available for an insufficient amount of time to improve outcomes	The project partners are willing and able to commit 100% of the necessary resources to ensure project progress and sustainability

Reflection/Evidence:



#### Potential Evidence Sources

Staff, funding, policies, organizational charts, meeting notes, meeting cadence, partnership agreements, sustainability plan



#### Supporting Tools/Resources:

- » [Preliminary Capacity-Building Needs Assessment for Education Agencies](#)
- » [BSCP Center Strategic Communications Toolbox for State Education Agencies](#)



3

## Act

### Guiding Questions for Action Planning

What other conversations can you have to move along the continuum?

- » How can the project plan be augmented to best document the commitment of resources?
- » What is the most pressing resource need?
- » Can committed resources be stretched further to support project goals?
- » Are there resources that were thought to be needed but are actually not essential?
- » Are there other colleagues within other parts of the organization who might be able to share helpful information on how they planned for or increased resources on their project?
- » Can technology be leveraged to meet some of the more pressing resource needs?

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Action Plan:

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## Conditions for Successful Projects (CSPs)

# Root Cause Identification

The root cause(s) of the high-leverage problem is determined, and the project plan includes specific actions to address the root cause(s).

1

### Understand

Each condition is described in detail to demonstrate how it is connected to project success. You will learn why the condition is important, how to assess your status within the condition, how to document your current condition, and how to use this information to develop a project plan.

2

### Reflect

Once you understand the value of each condition, we invite you to reflect on how your project fares on the rating scale. During this reflection, consider what evidence supports your rating and if you are where you want to be. If not, what would it take to move across the continuum? We offer a self-assessment worksheet for each condition. Additionally, if you are having trouble determining your current state, we have a resource library to help you.

3

### Act

Once you identify your current state and determine what to change, you are ready to add your next steps to your project plan. In the future, the CSPs can serve as a checkpoint to help you maximize your project's likelihood of success. Review your CSP work regularly to determine if you have improved your condition ratings and see if those changes have helped move your project forward. Write down your action steps in the table.

### Before You Begin...

- » List all interested parties/groups. Include both direct and indirect for the entire education delivery chain impacted by the project and involved in achieving desired outcomes
- » Research evidence-based practices that might apply to your project's goals
- » Scan for relevant policies/legislation that may influence project implementation

1

## Understand

### **Charting Your Course: Navigating from Present Position to Future Destination**

Identifying the root cause your project aims to solve is crucial for directing actions to the right opportunity for change. Ignoring the root cause puts success at risk. Like doctors treating symptoms and underlying conditions, projects should address the core issue driving change. If a root cause analysis still needs to be done, now is the perfect time. If it has, ensure this information is shared with relevant parties and integrated into the project plan.

### **Building Your Case: Gathering Evidence for Your Current Position**

A documented root cause analysis is the most substantial evidence for understanding the situation. Collaborating with interested parties during this process allows for fresh perspectives and a thorough evaluation of each root cause's impact. Remember to document any adjustments to your project's theory of change or logic model based on the analysis. This ensures clarity and alignment with the insights from the root cause investigation.

Once you've gathered and assessed the evidence, use the following scale to identify your current position. Remember that this rating is a benchmark, not a fixed position. If you find yourself at the Emerging stage, don't worry. You now have a clearer understanding of the steps needed to progress toward the advanced stage.

2

## Reflect

### Guiding Questions for Reflection

- » If a root cause analysis has not been conducted, what are the potential barriers? What are the facilitators? What data are needed to support analysis?
- » If a root cause analysis has been conducted, who was involved, and what did they learn? Can we use the data to create a baseline for performance management?

### State of the Project

Rate the current state of the project:

#### Emerging

The root cause has not been determined

#### Developing

The root cause has not been determined, and analysis is planned to identify underlying issues

#### Advancing

The root cause analysis has begun and is not complete

#### Mastery

The root cause analysis has been completed, shared with all relevant parties, and integrated into the project plan

Reflection/Evidence:



#### Potential Evidence Sources

Root cause analysis, revision to the theory of action based on root causes



#### Supporting Tools/Resources:

- » [Root Cause Analysis Tools and Templates](#)



3

## Act

### Guiding Questions for Action Planning

What other conversations can you have to move along the continuum?

- » If a root cause analysis has not been conducted, what is needed to start?
- » If conducting a root cause analysis already, what resources are needed to complete the analysis to identify underlying issues?
- » If a root cause analysis has been completed, how are collaborators engaging with the results? How can the project plan be improved to reflect the findings?
- » As new collaborators join the project, how is a discussion of the root causes shared with them for review and updating?
- » How does the project plan reflect revisiting the root causes of the issue being solved as context changes occur within the operating project?
- » How can you apply what is learned from this analysis to prevent future issues systematically?

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Action Plan:

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