



## 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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