Assessing Sites for Model Demonstration: Lessons Learned from OSEP Grantees

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Overview of the Model Demonstration Coordination Center

Beginning as early as 1970 and continuing through the reauthorization of IDEA 2004, Congress has authorized the U.S. Department of Education’s Office of Special Education Programs (OSEP) to conduct model demonstrations in early intervention and special education to improve early intervention and educational and transitional results for children with disabilities [Sec. 661 (a)]. The purpose of model demonstration projects (MDPs) is to develop new practice, procedure, or program models on the basis of theory and/or evidence-based research. Each project then implements its model in typical settings, assesses impacts, and, if the model is associated with benefits, may go on to disseminate it or scale it up. Since 2005, OSEP has funded four cohorts of MDPs, each focused on a single new and promising (or perhaps poorly understood or implemented) practice, procedure, or program that is deemed to have high potential for improving child outcomes.

To better inform OSEP’s model demonstration program, SRI International was awarded contracts in 2005 and 2010 to collect consistent data across MDPs—both within each cohort and across cohorts over multiple years and topic areas. The Model Demonstration Coordination Center (MDCC) works with each cohort to establish consistent design elements (such as sample definition and selection), data collection methods and timing, and instrumentation and to synthesize cross-MDP data. Using data collected from the four cohorts, MDCC will help OSEP better understand what makes an effective model demonstration.

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Assessing Sites for Model Demonstration

The purpose of this brief is to provide information to potential model demonstration grantees on assessing the capacity of sites to implement model demonstration projects. One of the early important tasks in the model demonstration process is identifying sites where there is a reasonable chance of implementation success and then preparing personnel at selected sites to be active and successful partners in model demonstration project work. It is not always clear, however, what factors make a potential site a good choice or how to determine whether those factors are present in a particular site. To inform these issues, MDCC staff gathered information from four cohorts of OSEP-funded model demonstration projects working in 41 sites. MDCC staff asked principal investigators (PIs) to reflect on their experiences with sites and suggest indicators of their capacity for model implementation. Respondents represented projects focused on a variety of types of interventions and implementation settings, from early intervention programs to elementary and secondary schools.

We begin by placing the issue of site assessment within the context of the MDCC conceptual framework and research on organizational change. Next we share insights of the personnel involved in previous model demonstration projects on the site characteristics that promote or hinder early implementation success. We conclude with a discussion of the implications of site assessment results for site selection, model demonstration implementation timelines and resources, and model components.

Conceptual Framework and Context

Figure 1 illustrates the key elements of the MDCC conceptual framework. The focus of this brief is on the “destination” organization (the site) such as a school, district, or community-based agency that adopts and hosts a model. The “source” is the model itself—the innovation or practices that have been developed to improve outcomes (e.g., student academic achievement). The “purveyor” is the model demonstration grantee that brings the model to the destination organization and actively works to support its implementation. The implementation process depicted in the figure operates in the context of influences that affect the processes, people, and institutions involved.

Achievement of the desired outcomes for the targeted population (e.g., improved writing proficiencies of high school students) is influenced by all components of the implementation process. Success will depend on the effectiveness and feasibility of the model; the ability of the model demonstration grantee to communicate the model features, provide effective support for implementation (e.g., professional development, ongoing coaching), and adapt the model to the needs of the destination organizations; and the ability and willingness of the destination organizations to implement the model as intended.

1 Adapted from Implementation Research: A Synthesis of the Literature (Fixsen, Naoom, Blase, Friedman, & Wallace, 2005).
Successful implementation by the destination organization requires changes in adult attitudes and behaviors and institutional structures and processes, none of which is easy. Research on school change (e.g., Fullan, 2007, 2010; Hall & Hord, 2011; Payne, 2008) indicates that change can take a significant amount of time and that specific conditions must exist or be created in the adoption of an innovation. However, much of what is known about adoption of innovations and school change is based on experiences of organizations independently choosing to adopt an innovation they have selected and for reasons of their own.

In contrast, model demonstration projects typically are not part of a natural organizational improvement process. In fact, their 3- or 4-year life span often dictates a fairly rapid implementation schedule, and resources for adoption and implementation may not resemble those available in a typical adoption process. Furthermore, model demonstration projects are frequently launched with an initial commitment made by site administrators who see a possible alignment with overall organizational improvement efforts. This initial commitment does not
always mean that there is a full understanding of implementation responsibilities, that commitments have been gained from the individuals who will actually be involved in implementation, or that those who made the original commitment will continue their involvement during implementation.

Given the important role of the destination organizations in the success of the model and the often constrained timelines and resources in model demonstrations, the selection and preparation of destination organizations should be carefully considered. In this critical early implementation stage, a model demonstration grantee has the opportunity to evaluate the presence or absence of conditions in the site optimal for successful implementation. Grantees can use this information to remove from consideration as model implementation partners sites that do not meet minimum thresholds of capacity. Early site assessment also serves to identify supports needed by the destination organization as well as modifications that can be made to the model to increase implementation success. Important results of the model demonstration process are the adaptations and refinements to the model that reflect the realities of implementation in typical settings. The earlier the realities of the destination organizations are understood, the sooner those adjustments can be made, increasing the odds of success within the model demonstration timeline.

Lessons Learned from OSEP Model Demonstration Projects

Below, we present lessons learned from the leaders of previous model demonstration projects about identifying the conditions at sites likely to promote or hinder the implementation of model demonstration projects. Respondents identified the following factors as the most important indicators of site capacity for implementing a model demonstration project.

Factors Facilitating Implementation

Regardless of the focus, type of intervention, or organizational setting of their interventions, the single most important facilitative factor cited by model demonstration grantees was administrative support for the model. The perceived need for the model and the buy-in of those implementing the intervention also were commonly cited.

- Administrative support. “You need an advocate in the district with power and influence who wants it to happen,” reported one PI. In schools, the principal’s support also is important. Every success story among grantees featured a key leader at the site who supported the model from the beginning. These leaders made sure that the schedules, budgets, and other resources required for successful implementation were in place. Though some of these leaders left during implementation, their support in the initial stages was critical. Without this leadership, change is difficult and cannot be systemic.
Salience of the problem the model addresses. A PI concluded, “The important lesson is to pick a school where staff are aware that they really need what you’re trying to sell them.” One grantee worked in a school with relatively high-achieving students where staff had little incentive to take on the often uncomfortable changes the model required in their practices, schedules, and responsibilities. Successful early implementation efforts occurred in sites where site personnel recognized the need that the model addressed and placed a high priority on addressing it.

Buy-in by those implementing the model. It is optimal to have the individuals who are expected to implement the model (e.g., teachers, early childhood education providers) actively opt in to bring the model to the site and to implement it. Project leaders reflecting back on their implementation experiences noted that those implementing the model at the site need not only to agree to the model, but to own it, adding that a sense of ownership should be nurtured from the initial implementation stages. Some acknowledged that true buy-in is not always easy to assess. One grantee struggled with a site throughout the initial implementation period and later learned that teachers never wanted the model but felt pressure by the principal to vote for it.

In addition to administrative support, awareness of need, and buy-in, other factors identified across projects as important facilitators of implementation success include the following.

Model compatibility with site culture, processes, and values. Several grantees cited challenges that could have been avoided if they had had a better understanding of the values, culture, and processes operating within the site and if the site had had a better understanding of the model principles prior to adoption and implementation. For example, an early childhood education project faced resistance by site leaders who held fundamental beliefs about working with families that conflicted with the model. Another project found that the direct instruction emphasis of their model was at odds with the culture and beliefs at a school that embraced a whole language approach to reading instruction.

Culture of learning and change. Some grantees felt that what matters most is that people are committed to change and are willing to learn. One project leader observed, “It is good to have a culture of curiosity and learning—you want people who expect to learn and grow.” Several project leaders added that initial interactions with site personnel can foster a climate of learning—interactions in which site personnel are treated as valued professionals and partners.

Culture of open communication and collaboration. A willingness by site personnel to engage in open communication and collaboration with each other and with outside entities such as model demonstration grantees supports the change process. Although project leaders acknowledged that this factor is not always easy to assess, they
believed it was an important sign of capacity for implementing a model demonstration project. Speaking from experience with a problematic site, a project leader reflected, “If the schools don’t answer your phone calls, this should be a red flag.”

- **Resources for implementation.** The site must have the basic resources required to implement the model. Model demonstration projects typically bring resources to a site (e.g., professional development personnel, curriculum and supporting materials); however, resources from the site are also required (e.g., release time for staff to attend training sessions). For example, one project with a tiered intervention model attempted to work in schools that could not provide staff for tertiary-level interventions due to budgetary issues. Resources committed to the project also demonstrate a site’s commitment to model implementation and sustainability.

**Hindrances to Implementation**

In addition to the absence of the above facilitators of implementation, PIs identified two factors that hinder the implementation of model demonstration projects.

- **Organizational instability.** An environment characterized by chaos and uncertainty does not favor the introduction of new practices and procedures required for successful model demonstration efforts. Model demonstration PIs were in agreement that issues such as significant staff turnover, leadership changes (e.g., new superintendent), and budget crises represented warning signs of suboptimal implementation conditions. Describing a partnering school district, one project leader observed, “Changes in the central office have been seismic and controversial.” Such changes create serious challenges to model demonstration implementation.

- **Lack of foundational skills of personnel.** Grantees cited challenges in implementing models in places where those implementing the model lacked the foundational skills needed for understanding model components and successfully implementing them. In multiple cases, project leaders discovered that they could not proceed with components of the model until they focused on developing foundational skills and knowledge such as classroom management, content knowledge, and a basic understanding of early childhood development. Given the timeline of the grants, some grantees wished they had had a better understanding of the skill levels of the staff they would be working with before they selected the sites or at least before they launched model implementation.

The two factors listed above represent those cited by multiple project leaders as the most important hindrances to sites’ capacity for model demonstration implementation. Other hindering factors mentioned include the influence and potential interference of professional unions (e.g., teacher unions that limit teachers’ availability for activities such as planning meetings), distractions resulting from accountability pressures (e.g., the presence of school restructuring agencies, state academic achievement tests dominating the instructional agenda), and school or classroom climates characterized by poor behavior.

“It is good to have a culture of curiosity and learning—you want people who expect to learn and grow.”

—Model Demonstration Project Leader
management for academic-focused interventions. Respondents felt that these factors were not insurmountable, yet they reduced the effectiveness and speed with which sites were able to implement the models.

**Implications of Site Assessment Results for Model Implementation**

Since OSEP commissioned MDCC to facilitate, document, and learn from the experiences of its model demonstration grantees, almost every project has had to shift its work to some degree because of the conditions present at partnering sites. Some projects have had to pull out of sites or have had sites drop out because hindering conditions were so significant that the site was unable or unwilling to be an implementing partner in achieving the goals of the model demonstration project. In these sites, the prerequisite conditions for success were not met. More often, however, model demonstration grantees found that sites were missing key elements that they had assumed would be in place. In these cases, PIs had to decide whether or not the demonstration project could or should attempt to address these missing elements rather than abandon the site. As a result, the demonstration projects evolved to include a variety of additional activities to supplement the planned innovation.

PIs acknowledged that the better they understood the facilitative or hindering conditions at sites, the better able they were to make necessary adjustments to their implementation strategies. Their reflections on how site assessment results helped them make these adjustments and begin building site capacity are presented below.

**Site Selection and Negotiations**

As project leaders assess the capacity of potential sites to be effective model demonstration partners, they need to identify the conditions considered absolutely necessary for successful implementation and determine the sensitivity of the model to implementation hindrances at the site. For sites judged to meet minimum criteria, leaders of previous model demonstration projects make the following suggestions for laying the groundwork for a successful partnership.

- **Clear expectations.** Some PIs regretted not spending more time during the site “courting” stage articulating the expectations for site personnel and what sites could expect from their participation in the grant. In hindsight, they realized that some site personnel did not understand the degree to which they would need to change their practices. PIs indicated that more detailed information up front about expectations would have helped site personnel make a more informed decision about participating in the project and better prepare them for implementation.

- **Detailed memoranda of understanding (MOU).** In addition to more detailed verbal communication with site personnel, PIs highlighted
the importance of making expectations explicit in a written MOU, even when they had had a long history in working in a particular site. Although MOUs were sometimes in place, model demonstration PIs identified misunderstandings that could have been avoided with more explicit MOUs. MOUs that describe the expectations of both the site and model demonstration grantee, including the resources and support each agrees to contribute, are especially valuable when there is turnover in key site personnel.

- **Learning sites’ goals, initiatives, and priorities.** Part of assessing site capacity is understanding how well a model fits with the priorities and initiatives already present in a site. Careful listening in early interactions with site personnel helped some previous grantees articulate how the models could support or be coordinated with existing priorities. The PIs of these projects recognized that the more aligned their model was with the sites’ major initiatives and priorities, the more receptive site personnel would be to embracing it.

- **Developing buy-in.** Recognizing that buy-in of site personnel is one of the most important facilitative conditions for implementation success, PIs mentioned the importance of building this element of site capacity from the beginning. Initial contacts with sites can influence the value site personnel place on the model and the partnership. Cultivating a deep bench of support early on will aid the buy-in process, according to previous grantees.

**Timeline and Resources**

As mentioned earlier, model demonstration grantees have limited time and resources to introduce innovative practices, bring sites to full implementation, and produce results. Recognizing this fact, PIs may be faced with making tradeoffs. Site assessment results can help grantees determine the types of resources required for successful implementation at a given site and make decisions about where to allocate those resources. For example, grantees may have an opportunity to work in a site where there are notable deficits (e.g., teachers are poorly prepared to teach fundamental content), yet the opportunity to make a significant positive impact is high (e.g., the model addresses a serious need at the site). PIs of earlier model demonstration grants emphasized the need to be realistic about the additional time and resources needed to bring such sites “up to speed” on fundamentals before basic components of the model can be implemented. Choosing such a site might result in a decision to work in fewer schools, reduce costs by having a smaller sample of students involved in data collection, or altering the schedule of planned professional development activities. It is important to assess these conditions realistically, because grantees must ultimately test the model and not get stalled by service delivery issues in the sites.
**Model Adaptations**

Model demonstration projects provide grantees the opportunity to take a model that may have worked well in a controlled environment to a setting that is more typical of potential adopters. Given the likely reality that the conditions at a particular site and the initial model components are not going to align perfectly, an early understanding of site conditions will allow grantees to alter the model to accommodate these mismatches. For example, high staff turnover in a site means that capacity does not stay built—that is, professional development activities that support model implementation may need to be repeated frequently to accommodate an ongoing influx of new staff. An earlier model demonstration project developed new strategies such as web-based teacher training modules that could be accessed on demand to accommodate the staffing realities at sites. Another grantee added a classroom management component to its model to address weaknesses among site personnel in this area. These types of model adaptations can increase the acceptability and fit of the model across sites, build capacity for successful implementation, and improve the potential for sustainability.

**Conclusion**

The collective experiences of those who have been involved in the implementation of model demonstration projects indicate that the implementation starting point—the initial interactions with potential or selected sites—is a critical evaluation step that should guide early implementation activities. PIs of previous model demonstration projects report that using these initial contacts to evaluate a site’s capacity for successful implementation can yield valuable information for site selection, preparation, and implementation. The considerations regarding site assessment highlighted here reflect the insights of leaders of OSEP-funded model demonstration projects implementing models in 41 sites. They are offered in a spirit of collaborative learning, with the intent to support the successful implementation of future model demonstrations.

Resources for assessing site capacity for model demonstration are included in the appendices. Appendix A provides information on previously developed resources, including links to reviews of assessment tools, links to actual assessment tools, and useful websites. A template for a site assessment tool developed by MDCC is included in Appendix B. Grantees are encouraged to use the template as a starting place and adapt it to meet their own needs.
### Table A-1. Resources for Assessing Site Capacity for Model Demonstration

<table>
<thead>
<tr>
<th>Resource and Website</th>
<th>Description</th>
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<tr>
<td>Organizational Partnership Functioning &amp; Change Readiness: 24 Assessment Tools</td>
<td>Developed by the National Child Welfare Workforce Institute (NCWWI), this document lists references and websites for 24 tools for assessing organizations' readiness for change (National Child Welfare Workforce Institute, 2011).</td>
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<tr>
<td>Measures of Organizational Readiness</td>
<td>This document was developed by the NASMHPD (National Association of State Mental Health Program Directors) Research Institute, Inc. (NRI). It reviews seven measurement instruments, providing information about each instrument's purpose and administration, content domains, and psychometric properties, if available (Rivard, 2005).</td>
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<td>National Implementation Research Network (NIRN)</td>
<td>“The mission of the National Implementation Research Network (NIRN) is to close the gap between science and service by improving the science and practice of implementation in relation to evidence-based programs and practices” (taken from home page of NIRN website, link below). The website has links to many resources, including information on the exploration and adoption stage of implementation.</td>
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<td>Source: <a href="http://www.fpg.unc.edu/~nirn/">http://www.fpg.unc.edu/~nirn/</a></td>
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<tr>
<td>State Implementation &amp; Scaling-Up of Evidence-based Practices (SISEP)</td>
<td>SISEP Center is a program of the FPG Child Development Institute at University of North Carolina at Chapel Hill, Positive Behavioral Interventions and Supports (PBIS) and NIRN (see above). The website has links to documents and videos on the exploration and adoption stage of implementation, including assessing site readiness.</td>
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<td>Source: <a href="http://sisep.fpg.unc.edu/">http://sisep.fpg.unc.edu/</a></td>
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<td>Community Readiness Model</td>
<td>This model was developed by the Tri-Ethnic Center for Prevention Research at Colorado State University. “The Community Readiness Model is an innovative method for assessing the level of readiness of a community to develop and implement prevention programming. It can be used as both a research tool to assess levels of readiness across a group of communities or as a tool to guide prevention efforts at the individual community level” (taken from website, link below). A handbook can be downloaded for free (Plested, Edwards, &amp; Jumper-Thurman, 2006).</td>
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<tr>
<td>Source: <a href="http://www.triethniccenter.colostate.edu/communityReadiness_home.htm">http://www.triethniccenter.colostate.edu/communityReadiness_home.htm</a></td>
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Appendix B: Site Assessment Worksheet

The purpose of the Site Assessment Worksheet is to provide those involved in launching model demonstration work with a tool to aid in site selection and preparation for model demonstration work. The questions posed here largely align with the dimensions presented in Assessing Sites for Model Demonstration: Lessons Learned from OSEP Grantees and should be considered in the context of the information provided in this document. This tool has been developed around the information provided by previous model demonstration implementers; it has not been validated in any systematic way. We hope that the worksheet will prompt reflection and consideration of site capacity and selection issues that have challenged those who have been involved in previous model demonstration implementation efforts.

Suggested Guidelines for Using the Site Assessment Worksheet

Model demonstration project leaders are encouraged to use this tool as a starting place for assessing conditions at potential or selected sites and tailoring it to their own needs. The worksheet provides generic prompts meant to be applicable across a large range of models or innovations (e.g., behavioral interventions, instructional practices, schoolwide programs), targeted population (e.g., elementary or high school students, infants and toddlers, children with specific needs such as English language learners), and implementing organizations (e.g., early childhood education providers, schools or districts, community-based organizations). Project leaders will need to decide which aspects of site capacity and which organizational units within a site are most relevant to their model demonstration project. For example, for a classroom-based intervention, assessing the buy-in of teachers and school administrators will likely be important; whereas, assessing the buy-in of early intervention coaches and families may be more important for community-based early childhood education programs. In addition, project leaders may want to add questions to address site capacity issues that are specific to their model.

There are a variety of ways that the worksheet can be used. Project leaders can, individually or as part of a small group discussion, use each question to assess the capacity of a single site related to each dimension. Since team members may have independent ratings about a site’s capacity and different sources of information about a site, it may be helpful to ask different individuals to complete the worksheet independently, and then come together to discuss ratings and potential actions. Alternately, the worksheet can be completed as a team.

Each question on the worksheet has two parts: the first part is a rating scale; the second part consists of a set of questions that are designed to prompt reflection about evidence and possible actions. For each question, project leaders should rate their estimate of a specific site’s capacity on that dimension and then answer the questions. There is space at the end to note additional concerns or observations.
Site Assessment Worksheet

Circle the numerical rating for each question that represents your best estimate of the current level of a site’s capacity to successfully participate in and implement model demonstration activities. A rating toward the lower end of the scale indicates your belief that there is potential for a problem.

1. What is the level of administrative support for model demonstration work? (Consider relevant organizational levels such as department/instructional unit, school/program level, district/institutional level.)

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a. On what data/basis can we make this judgment?

b. What additional data/information do we need to collect?

c. How might we accommodate/adjust our resources, timeline, or activities to build capacity?

d. What specific actions are we willing to take to build site capacity?

2. What is the level of the salience of the problem the model addresses among those who will be responsible for implementing different elements of the model? That is, what is the level of awareness of the problem and sense of urgency in addressing it? (Consider relevant groups such as instruction/service providers, school/program support staff and administrators, district/institutional staff, community members/groups.)

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d. What specific actions are we willing to take to build site capacity?
3. What is the level of **buy-in** to the model by those who will be responsible for implementing different elements of the model? (Consider relevant groups such as instruction/service providers, school/program support staff and administrators, district/institutional staff, community members/groups.)

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d. What specific actions are we willing to take to build site capacity?

4. What is the level of model compatibility with the site’s **culture, processes, and values**? (Consider relevant groups such as instruction/service providers, school/program support staff and administrators, district/institutional staff, community members/groups.)

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d. What specific actions are we willing to take to build site capacity?
Site Assessment Worksheet (cont’d.)

5. What is the level of support for a **culture of learning and change** among those who will be responsible for implementing different elements of the model? (Consider relevant groups such as instruction/service providers, school/program support staff and administrators, district/institutional staff, community members/groups.)

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d. What specific actions are we willing to take to build site capacity?

6. What is the level of support for **open communication and collaboration** among those who will be responsible for implementing different elements of the model? (Consider relevant groups such as instruction/service providers, school/program support staff and administrators, district/institutional staff, community members/groups.)

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d. What specific actions are we willing to take to build site capacity?
Site Assessment Worksheet (cont’d.)

7. What is the level of sufficiency of the resources (e.g., time and materials) required at the site for implementing the model? (Consider relevant organizational levels such as department/instructional unit, school/program level, district/institutional level.)

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d. What specific actions are we willing to take to build site capacity?

8. What is the level of organizational stability at the site (Consider relevant organizational levels such as department/instructional unit, school/program level, district/institutional level.)

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c. How might we accommodate/adjust our resources, timeline, or activities to build capacity?

d. What specific actions are we willing to take to build site capacity?
Site Assessment Worksheet (cont’d.)

9. What is the level of **foundational/prerequisite skills/expertise** required for the model among those who will be responsible for implementing different elements of the model? (Consider relevant groups such as instruction/service providers, school/program support staff and administrators, district/institutional staff, community members/groups.)

<table>
<thead>
<tr>
<th>Level</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low</td>
<td>Somewhat low</td>
<td>Neither high nor low</td>
<td>Somewhat high</td>
<td>High</td>
<td></td>
</tr>
</tbody>
</table>

a. On what data/basis can we make this judgment?

b. What additional data/information do we need to collect?

c. How might we accommodate/adjust our resources, timeline, or activities to build capacity?

d. What specific actions are we willing to take to build site capacity?

10. What other conditions are present at the site that may facilitate or hinder implementation? For each factor, consider the level of support for implementation and the following questions.

<table>
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References


