Midwest Center for School Mental Health

BUILDING THE CONDITIONS FOR STAFF WELL-BEING

A toolkit for addressing school staff stress and burnout



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The Midwest Center for School Mental Health works to strengthen the capacity of schools and communities to support the mental health and well-being of students and the adults who serve them. The Center provides training, technical assistance, resources, and implementation support to help schools use evidence and local information to develop practical, sustainable approaches that fit their needs and context.

This toolkit was developed to help schools and districts move beyond one-size-fits-all approaches to staff well-being. It provides a structured process for understanding staff experiences, identifying workplace conditions that contribute to stress and burnout, selecting and testing promising strategies, and implementing changes in ways that are feasible, equitable, and sustainable.

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Introduction

Why staff well-being matters

Schools depend on the people who work in them. That includes teachers and administrators, but also paraprofessionals, student-support professionals, office and technology staff, food-service and facilities staff, transportation staff, substitutes, and many others. Their roles differ, but together they make it possible for schools to educate students, build relationships, respond to student needs, and maintain safe and supportive learning environments. Yet many of the people carrying out this vital work are experiencing high levels of stress, exhaustion, and burnout.

Recent national data illustrate the extent of the problem among teachers, the school workforce group for whom the most data are available. For example, the 2026 RAND State of the American Teacher survey found that teachers continue to experience substantially poorer well-being than comparable working adults. More than half of the surveyed teachers (55%) reported frequent job-related stress, compared with 34% of similar working adults. Similarly, 57% of teachers reported burnout, compared with 36% of other working adults. Of particular concern for the long-term stability of the educator workforce, only about one in four teachers reported that they planned to remain in the profession for as long as they were able (Steiner et al., 2026).

Staff well-being is shaped not only by how people cope with work, but also by how the work itself is organized.

There is no single source of staff stress and burnout in our schools. School staff work in environments increasingly shaped by staffing shortages, student academic and mental health needs, challenging student behavior, heavy workloads, administrative demands, limited time, and other pressures. Studies of educators have linked well-being and burnout with working conditions including workload, professional autonomy, social support, leadership, and organizational climate (Sohail et al., 2023). On the other hand, supportive relationships with school leaders and colleagues, policies that promote staff emotional well-being, and positive school climate were all associated with lower levels of work stress and other mental health concerns (Lester et al., 2020).

Staff well-being matters in its own right. Along with other places of employment, schools should be responsible for creating healthy, supportive work environments for all of their employees. But the importance of staff well-being extends far beyond its impact on individual

employees. How adults experience their work influences the entire school environment, including instruction, relationships with students, school climate, and the ability of schools to recruit and retain an effective workforce.

Important limitation of the evidence base

Teacher research is important, but teachers are not the entire school workforce. Much of the published information about school staff well-being focuses on teachers. Far less published research examines well-being, stress, and working conditions among many other school employees, particularly operational and support staff. Throughout the toolkit, we identify who was studied when that matters and avoid assuming that a finding about teachers automatically applies to every role. For many support and operational staff, the research is still sparse. **The absence of research should not be mistaken for evidence that these employees' experiences matter less.**

Staff well-being affects the whole school

Stress and burnout can affect educators' ability to bring their full cognitive, emotional, and relational resources to their work. Teaching and other school-based roles require sustained attention, problem solving, emotional regulation, flexibility, and relationship-building. When staff feel chronically overwhelmed or exhausted, these capacities may be more difficult to sustain. Research has linked educator well-being and burnout with teaching effectiveness, classroom climate, teacher-student relationships, and student outcomes (Cann et al., 2024).

Students are affected by the well-being of the adults around them. Supportive relationships with adults are a central feature of healthy school environments. Educators play a vital role in creating classrooms where students feel safe, connected, engaged, and ready to learn. With adequate support, manageable demands, and strong relationships with colleagues and leaders, staff are better positioned to provide the consistent, responsive relationships students need. Conversely, chronic educator stress and burnout are associated with strained interactions with students and less supportive school environments. For this reason, educator and student well-being should not be viewed as competing priorities. Supporting the adults who care for and teach students is one pathway toward supporting students themselves (American Federation of Teachers & Educators Thriving, 2023).

Staff well-being also has important organizational consequences. High stress and burnout are associated with intentions to leave the profession, contributing to turnover and staffing instability (American Federation of Teachers & Educators Thriving, 2023; Steiner et al., 2026). Turnover, vacancies, and absenteeism create additional demands for other school staff, who

may be expected to cover more classes, assume additional responsibilities, orient new staff, or work with fewer colleagues.

In practice, this can create a reinforcing cycle: vacancies and turnover may increase coverage and onboarding demands for remaining staff, adding pressure to already difficult working conditions. Improving the conditions in which adults work can help schools build a more stable workforce, strengthen relationships, support high-quality instruction, create healthier school climates, and ultimately improve the environment in which students learn and develop.

> **Investing in staff well-being should not be viewed as an "extra" that competes with a school's academic mission. Staff well-being is part of the infrastructure that makes that mission possible.**

Self-care can help, but is not enough

Efforts to improve staff well-being often begin with a reasonable question: What can we offer employees to help them manage stress?

Schools may provide wellness activities, mindfulness programs, resilience training, exercise opportunities, stress-management resources, or other supports. These strategies can sometimes be helpful. Some individual-level interventions have demonstrated benefits for teacher mental health and well-being (Avola et al., 2025; Beames et al., 2023). The problem arises when self-care becomes the primary organizational response to stress that is being produced or exacerbated by working conditions.

> **Helping employees cope with stress is different from addressing the conditions that create it.**

Mindfulness does not create planning time. Stress-management training does not fill a vacancy. Resilience training cannot substitute for effective leadership, safe working conditions, adequate staffing, or reliable systems for responding to student needs.

The goal is not to choose between supporting individuals or improving organizations. Staff deserve access to resources and care that can help them manage stress and enhance well-being. At the same time, organizations have responsibility for examining preventable demands and strengthening the conditions that help people do their work well.

When individual coping strategies become the organization's primary response to work-related stress, they may also send an unintended message: that employees are responsible for

adapting to conditions the organization itself could change. That does not make self-care or individual supports unhelpful. It means they should not substitute for examining workload, resources, leadership, relationships, autonomy, policies, and other working conditions.

Schools can do both. They can provide employees with resources that help them care for themselves and manage the stress that is an unavoidable part of demanding work. Simultaneously, they can reduce preventable sources of stress and strengthen the organizational conditions that support well-being. Reviews of educator well-being interventions increasingly point toward multifaceted and whole-school approaches rather than relying exclusively on individual-level strategies (Cann et al., 2024).

There is reason for optimism

The challenges facing school staff are significant, but stress and burnout are not inevitable consequences of working in schools. There is evidence that educator well-being can improve, although the evidence is stronger for some types of intervention than others. The broader research on working conditions also identifies organizational factors that schools and districts can potentially influence (Beames et al., 2023; Cann et al., 2024; Naghieh et al., 2015).

Every school has conditions it can influence.

Schools may not be able to eliminate every source of stress. Many pressures facing educators are shaped by larger systems that individual schools cannot control, such as district, contractual, labor-market, regulatory, or policy environments.

Schools do have the power to change many conditions that impact staff stress. They can listen more carefully, redesign work, clarify priorities, strengthen support, improve access to resources, test promising changes, and stop or adapt practices that create burden without enough value.

This toolkit is designed to support that work. It does not prescribe one well-being program. Instead, it helps teams understand what staff are experiencing, identify contributing workplace factors, choose a target for change, consider evidence-informed strategies, test assumptions, learn from implementation, and sustain what proves useful.

How to use this toolkit

A different approach to staff well-being

It is probably not possible to create a school with no stress. That is not the goal of this toolkit. Instead, our goal is to give schools and districts a credible way to identify preventable sources of strain, strengthen the conditions that help people do meaningful work, and keep learning about what helps, for whom, under what conditions, and with what burden.

Instead of starting with a program, we start with the work itself. What are people experiencing? What helps them do their jobs well and what gets in the way? What appears to be contributing to the problem? Which conditions can realistically be changed, strengthened, reduced, protected, or redesigned?

> **Look beneath the symptoms of stress - but do not assume there is only one contributing factor.**

Complex workplace problems rarely trace to one root cause. The toolkit therefore uses the broader language of **contributing factors**. Our aim is not to diagnose the organization or situation perfectly. Instead, we want to understand what staff are experiencing and why well enough to move forward responsibly.

Three foundations for the toolkit

The toolkit outlines a process for understanding staff experiences, prioritizing and selecting potential strategies for promoting well-being, testing these strategies, and learning from the results. This process was strongly guided by three different, but complementary, frameworks.

HUMAN-CENTERED DESIGN

Understand the lived experiences of staff. Design with – rather than for – staff. Generate, test, and refine ideas.

IMPLEMENTATION SCIENCE

Attend to context, readiness, barriers and facilitators, implementation supports, adaptation, outcomes, and sustainability.

ORGANIZATIONAL CHANGE

Build shared purpose and ownership. Attend to leadership, trust, communication, culture, competing demands, pacing, capability, reinforcement, and the cumulative burden of change.

The process draws particularly on human-centered design guidance from IDEO/IDEO.org, implementation frameworks such as the Consolidated Framework for Implementation Research (CFIR) and the Active Implementation Frameworks, and organizational change literature addressing leadership, participation, communication, and organizational context.

Six core values

In addition to these three frameworks, the toolkit is built around six core values.

1

CENTER STAFF VOICE AND EXPERIENCE

Staff are experts on their own working conditions and should be meaningful partners in identifying problems and designing solutions.

2

LOOK BEYOND SYMPTOMS TO ORGANIZATIONAL CONDITIONS

Efforts should address organizational conditions contributing to staff stress and burnout, rather than relying primarily on strategies that ask people to cope better with these conditions.

3

ATTEND TO CONTEXT AND FEASIBILITY

A strategy must fit the realities, resources, priorities, and capacity of the specific setting in which it will be implemented.

4

DESIGN FOR EQUITY

Staff experiences vary across roles or groups. The process should intentionally seek out perspectives that might otherwise be overlooked. Consider who benefits from proposed changes, and who may experience unintended burdens.

5

LEARN THROUGH TESTING AND ADAPTATION

Solutions do not need to be perfect before they are tried. Small-scale testing provides an opportunity to learn what works, for whom, and under what conditions before implementation is expanded.

6

COMMUNICATE CONSISTENTLY AND OPENLY

School staff should not only provide input, but should also receive consistent updates about the well-being initiative. This communication should clearly indicate the goals of the process, how decisions will be made, what is and is not possible, and how staff input is being used. All staff should receive regular updates, summarizing what was heard, what actions are being considered, what was decided, and why.

An evidence-informed approach

We consider this recommended staff well-being process "evidence-informed" rather than "evidence-based." The toolkit draws on a variety of evidence sources, especially as it relates to the specific strategies for promoting staff well-being that are presented in Part 2. Schools should make decisions based on multiple sources of information.

When considering a strategy, distinguish among three different questions:

Does the workplace factor matter for staff well-being?

Is there evidence that the proposed strategy can change that factor?

Is there evidence that the strategy ultimately improves staff well-being or related outcomes?

Evidence for one does not automatically establish the others.

Strong research support for a strategy does not guarantee that it will work in every school. For example, strong evidence that excessive workload is associated with burnout does not mean that a particular workload-reduction strategy will reduce burnout. Conversely, limited direct intervention evidence does not necessarily imply that the strategy cannot be effective. It may simply mean that at this time limited studies have examined that particular strategy's impact on staff well-being.

Overview of the toolkit

Part 1 is the improvement process

This five-phase process helps teams prepare, listen, prioritize, understand contributing factors, choose a target, design and select strategies, pilot, implement, evaluate, adapt, and sustain. The results of each phase are integrated into a Staff Well-Being Plan that will provide a continuous reasoning trail and summary across all five phases.

Part 2 is the evidence and strategy guide

This section summarizes possible changes related to workload; staffing and capacity; leadership and supervision; voice and autonomy; professional and relational support; systems for meeting student needs; organizational change and competing demands; employment, material, and physical working conditions; and individual well-being and access to care.

Part 3 provides tools, worksheets, and supplemental resources

The toolkit includes reflection questions, self-assessments, templates, and other materials that teams can use or adapt throughout the process.

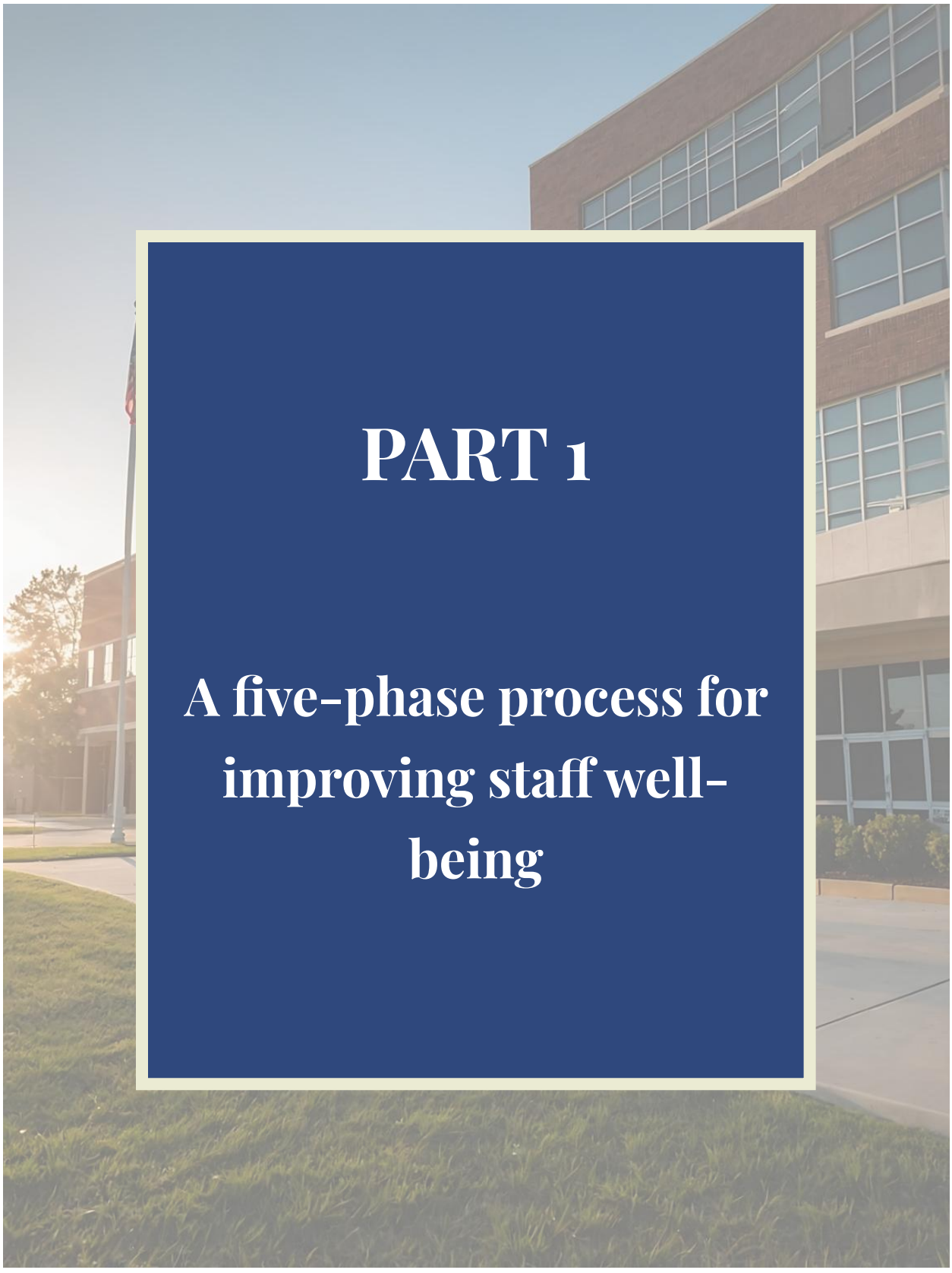
Part 4 illustrates the process in action

Part 4 follows four fictional school and district examples through the five phases. The examples show how teams make decisions under different readiness conditions, revise assumptions, encounter implementation challenges, and adapt their approaches.

Choose the right starting point

While we recommend working through the full five-phase process, you do not necessarily need to read the toolkit from beginning to end before taking action. Start where your team is now and move backward or forward as needed.

WHAT DO YOU NEED?	GO TO…
We are not sure where to begin	Phase 1: Prepare & Build Readiness
We need to understand what staff are experiencing	Phase 2: Understand Staff Experiences
We have identified an area of concern and need to understand what is contributing to it and what we might change	Phase 3: Prioritize Issues & Select Potential Strategies
We need evidence or ideas for a particular workplace factor	Part 2: Go directly to the relevant strategy section
We need a worksheet or decision aid	Tools, Worksheets & Supplemental Resources



PART 1

A five-phase process for improving staff well-being

Overview of process

Improving staff well-being is not just a matter of finding the right wellness program. Schools first need to understand what staff are experiencing, identify the workplace factors that appear to contribute, decide what is meaningful and feasible to change, test promising responses, and learn how to implement and sustain changes under real conditions.

The process we outline in this toolkit provides a flexible but structured approach for moving from understanding the problem to designing, testing, and sustaining solutions. As described earlier, the process draws heavily from human-centered design, implementation science, and organizational change.

Part 1 provides a five-phase process for moving from understanding staff experiences to testing, implementing, and sustaining changes in working conditions. The phases provide structure without requiring every team to follow exactly the same path.

PHASE	CENTRAL QUESTION
1. Prepare & build readiness	What will help us do this work well, what could get in the way, and what should we strengthen before or while we move forward?
2. Understand staff experiences	What are staff experiencing and what deserves closer attention?
3. Prioritize issues & select potential strategies	Which issue should we address, what contributes to it, what should change, and what might we try?
4. Pilot test strategy & assess success	What happens when we try the strategy, and what do we learn?
5. Develop & launch full implementation plan	How do we implement the change well, understand whether it is helping, and sustain what works?

Guidelines

Keep the following guidelines in mind when working through the process.

Use only as much process as the problem requires

The phases provide structure, not bureaucracy. A small, well-understood problem may require a scaled-back process. A complex or contested problem may require deeper inquiry. Collect enough information to make the next decision responsibly, not enough to eliminate all uncertainty.

Expect to move backward as well as forward

The phases are presented in sequence because each creates information needed for the next decision. In practice, improvement is iterative. New information may lead you to revisit an assumption, collect additional input, reconsider a target, adapt a strategy, or return to an earlier phase. That is learning, not failure.

"School staff" means everyone

When the toolkit says "staff," it means the full school workforce. Teams should repeatedly ask which staff are impacted, including staff who do not work primarily in classrooms. The published evidence will not always provide answers for every role, so local staff experience becomes especially important. Staff should be thoughtfully included throughout the process so that a meaningful range of experiences and perspectives shapes the work.

A five-phase process for improving staff well-being

1

Prepare & build readiness



Before launching a design process, first assess readiness to move forward, ensure leadership support, and build a diverse design team to lead the project.

2

Understand staff experiences



Strategies must be built on an understanding of staff needs and experiences. Engage staff through surveys, interviews or listening sessions, and observational strategies.

3

Prioritize issues & select potential strategies



Identify concerns that warrant action, investigate the factors contributing to them, determine what should change, and identify promising strategies to test.

4

Pilot test strategy & assess success



A potential strategy is tested on a small scale. The results of that pilot test are used to improve the approach prior to launching a full-scale implementation.

5

Develop & launch full implementation plan



Once the approach has been strengthened, it can be fully implemented. A variety of strategies can be used to support a successful and sustainable intervention.

Staff well-being plan

The Staff Well-Being Plan is the running record of the team's reasoning across all five phases. Worksheets can help with particular tasks, but the most important findings and decisions should return to this plan. A new team member should be able to read it and understand **what the team is trying to improve, why key decisions were made, what has been learned, and what happens next.**

The Staff Well-Being Plan should include:

STAFF WELL-BEING PLAN CONTENT	DETAILS TO INCLUDE
UNDERSTANDING THE PROBLEM	• why we started/context • staff experience • priority/contributing factors
CHOOSING WHAT TO CHANGE	• target • strategy and alternatives • assumptions
LEARNING AND IMPLEMENTING	• pilot learning • barriers/facilitators • implementation supports • outcomes/adaptations/next decision

Recurring checks

Three short checks recur across the process. They are intended to influence decisions, not simply document that a topic was considered.

1	**EQUITY CHECK** Who is represented in what we know? Whose experience may be missing or hidden? Who benefits, who benefits less, who bears burden, and who has meaningful influence?
2	**BURDEN CHECK** What work are we creating, removing, or moving – and for whom?
3	**DECISION GATE** Do we know enough to make the next decision responsibly?

Learn More

The field guide to human-centered design and the Human-centered design guide series | Digital.gov - Use when you need practical methods for moving through a human-centered design process, including interviewing, ideation, prototyping and facilitation.

Design kit – Use this free online course when you want a public-sector-oriented introduction to human-centered design.

Consolidated Framework for Implementation Research (CFIR) Guide – Use this guide to learn more about implementation barriers and supports.

Active implementation frameworks | National Implementation Research Network (NIRN) – Explore the links in this resource hub when you need guidance on implementation teams, usable innovations, implementation drivers, or improvement cycles.

PHASE 1: Prepare & build readiness

CENTRAL QUESTION

What will help us do this work well, what could get in the way, and what should we strengthen before or while we move forward?

It can be tempting to begin a staff well-being initiative by asking staff what they need or looking for promising strategies. But asking people to share candid feedback about their working conditions creates an expectation that the organization is prepared to listen, learn, and respond.

Phase 1 creates the conditions for a credible process. Readiness does not need to be perfect before the work begins; it can be strengthened over time. The goal is to understand your starting point, build on strengths, address conditions that could undermine the work, establish meaningful leadership commitment, and build a capable team.



During this phase, your school or district will:

1

ASSESS YOUR STARTING CONDITIONS

Identify existing strengths and readiness gaps related to motivation, general organizational capacity, and capacity for this particular work.

2

STRENGTHEN READINESS WHERE NEEDED

Decide which challenges need attention before proceeding and which can be addressed as the work unfolds.

3

BUILD MEANINGFUL LEADERSHIP SUPPORT

Establish the commitment, authority, resources, openness, and communication needed for staff input to have a realistic path toward action.

4

BUILD AND PREPARE THE DESIGN TEAM

Bring together people with different roles, experiences, perspectives, and forms of influence to guide the process.

You do not need to solve every readiness challenge by the end of Phase 1. However, you should be able to answer a more practical question: Are the conditions strong enough to begin asking staff to invest their time, candor, and trust in this process?

Action 1: Assess your starting conditions

Why assess readiness?

Readiness is sometimes treated as a preliminary hurdle, where you assess whether an organization is "ready" and then either proceed or wait. That is not how readiness is used in this toolkit.

The purpose of assessing readiness is to understand the conditions that will shape the work. A school may have strong commitment to staff well-being, but little protected time or experience with collaborative improvement. Another may have effective improvement structures, but low trust or little willingness to examine organizational contributors to stress. These situations require different preparation.

For that reason, the readiness assessment is not designed to produce a passing score. It is designed to help a team answer three questions:

- What strengths can we build on?
- What could interfere with this work?
- What should we strengthen before or while we proceed?

This toolkit considers three complementary dimensions of readiness (adapted from the R=MC^2 Readiness Framework proposed by Scaccia et al., 2015):

1	**MOTIVATION: Do we believe this matters enough to act?** Motivation refers to the perceived incentives and disincentives associated with adopting a particular innovation. For this toolkit, that includes whether staff and leaders see staff well-being as important enough to act on and whether they are willing to examine organizational conditions—not only individual coping.
2	**GENERAL ORGANIZATIONAL CAPACITY: Does our organization have a strong foundation for improvement and change?** General capacity includes organizational conditions that support many types of improvement efforts, not just work focused on staff well-being. These include trust, leadership support, opportunities for staff participation, effective communication, collaborative problem-solving, use of data and feedback, and the ability to learn and adapt when improvement efforts do not go as planned.
3	**CAPACITY SPECIFIC TO THIS WORK: Do we have the capacity to carry out this specific staff well-being process?** Capacity specific to this work refers to the people, skills, resources, structures, and supports needed specifically to carry out a staff well-being design and implementation process. This includes a representative design team, sufficient time and resources, ways to gather candid staff input, skills for facilitating design activities, access to useful data, leadership willingness to respond to what is learned, and capacity to test and implement potential solutions.

The three dimensions are related but not interchangeable. A school may be highly motivated but lack the time, skills, or structures needed to carry out the work. Another may have strong improvement capacity but little willingness to examine organizational contributors to staff stress. These differences matter because they point to different next steps.

Use the readiness process to identify what can be built on, what needs strengthening, and what could seriously undermine the credibility or feasibility of the work.

Taken together, these dimensions provide a picture of the environment in which the work will begin. The next step is to make that picture concrete. Use the reflection questions and readiness assessment to surface different perspectives—not simply to reach agreement.

Tools, Worksheets & Supplemental Resources

The Tools and Worksheets section of the toolkit provides several resources for assessing your school's readiness to move forward with a project, including a set of reflection/discussion questions and a more structured Readiness Assessment.

The reflection questions and readiness assessment are intended to be tools for discussion and learning, rather than as a test that must be completed perfectly. These tools should not be completed by just one person. Begin with a small group that includes multiple perspectives, ideally school or district leaders, staff who will help lead the work, and employees representing different roles and experiences. Discuss the reflection questions first, then use the self-assessment to identify areas of strength, uncertainty, or concern. Encourage participants to explain the thinking behind their ratings rather than focusing on reaching agreement. Differences in perspective can provide important information. For example, leaders and staff may have very different views about whether employees feel safe raising concerns or whether staff input typically influences decisions.

Action 2: Strengthen readiness where needed

Readiness assessment is useful only if it changes what you do. Completing the Readiness Assessment is not the end of the readiness process. The purpose is to use what you learn to shape how the initiative begins. Do not calculate a total readiness score. The purpose is to identify patterns that should shape what you do next.

Start by looking for patterns. Where are the strongest conditions? Where is there uncertainty? Where do different groups experience the school setting differently? Most importantly, which of these identified conditions could prevent staff from participating meaningfully or prevent the organization from acting on what it learns?

Not every readiness gap requires delaying the work. The question is not whether every condition is strong. The question is what each finding requires you to do.

ADDRESS BEFORE PROCEEDING

These are conditions that could undermine the credibility or feasibility of the process. For example, leaders may be unwilling to consider organizational changes, staff may have no reasonably safe way to provide candid input, or there may be no one with the authority or capacity to lead the work.

STRENGTHEN AS YOU PROCEED

Some capacities can be developed through the process itself. A team may need additional facilitation skills, better communication routines, more experience using data, or stronger structures for collaborative problem solving. These gaps matter, but do not necessarily require postponing the work.

MONITOR THROUGHOUT

The team may determine that readiness is strong across all three domains. However, readiness is not something you establish once and then leave behind. Leadership support, trust, competing demands, available time, staff capacity, and organizational priorities can change. Revisit them as the work proceeds.

Choose a response that fits the reason the readiness gap exists in your setting. The following table provides some examples, but these are not fixed prescriptions.

IF YOU FIND…	CONSIDER…
LIMITED STAFF TIME	• Narrow the scope • Protect design-team time • Integrate the work into existing improvement structures • Reduce other responsibilities rather than simply adding meetings
LOW TRUST	• Begin with listening • Gather anonymous input • Develop clear strategies to protect confidentiality, and explain these strategies • Acknowledge previous experiences • Follow through visibly on commitments you can realistically make
CHANGE FATIGUE	• Connect the work to existing priorities • Explicitly identify what this work replaces • Avoid branding it as another initiative

IF YOU FIND…	CONSIDER…
LIMITED IMPROVEMENT EXPERIENCE	• Provide skilled facilitation • Introduce tools one at a time • Use structured templates • Begin with a manageable problem
WEAK COMMUNICATION	• Establish a communication plan before collecting input • Designate who communicates what, how often, and through which channels
LIMITED DATA CAPACITY	• Start with a small number of useful measures • Combine quantitative data with staff stories • Identify someone responsible for organizing findings • Seek skilled consultation if needed
LIMITED RESOURCES	• Prioritize problems within the school's sphere of influence • Prototype inexpensive changes before making large investments • Distinguish resource constraints that can be redesigned from constraints the team cannot control
STAFF SKEPTICISM	• Acknowledge rather than counter skepticism • Explain how decisions will be made • Demonstrate early that staff input results in action
LIMITED HUMAN-CENTERED DESIGN KNOWLEDGE OR SKILLS	• Provide brief training, facilitation guides, interview protocols, contributing factor analysis tools, and structured practice
COMPETING INITIATIVES	• Map current initiatives • Identify overlap • Integrate rather than add • Pause or eliminate lower-priority work where possible

Tools, Worksheets & Supplemental Resources

Before moving to Action 3, take some time to compile all the readiness information and create a plan. Use the Readiness Summary & Plan to summarize the readiness assessment and to create a plan for monitoring and strengthening important aspects of readiness.

Learn More

These resources provide some deeper information regarding readiness.

R=MC² organizational readiness framework – Use this article to learn more about the three elements of readiness, and how they can each be used to identify strategies for strengthening implementation.

Organizational readiness for implementing change (ORIC) and Organizational readiness to change assessment (ORCA) – Use these resources if you want to use a psychometrically-tested readiness measure.

Action 3: Build meaningful leadership support

The readiness assessment may identify many conditions that need attention, but leadership commitment deserves particular attention before broad staff engagement begins.

Why leadership support matters

Leadership support is essential to meaningful and sustainable staff well-being improvement. Leaders help determine what receives attention, how resources are allocated, whether staff have time to participate, how openly problems can be discussed, and whether proposed changes to organizational practices can actually be implemented. Implementation research identifies leadership as an important part of the organizational context for change. Aarons and colleagues' Implementation Leadership Scale, for example, focuses on leadership behaviors that are proactive, knowledgeable, supportive, and perseverant during implementation (Aarons et al., 2014). Although developed in behavioral health implementation settings, this framework offers a useful way to think about the leadership behaviors needed to support change.

Leadership may be particularly important in efforts to improve staff well-being. Through the process, you may identify organizational conditions that contribute to staff stress, such as workload, schedules, communication practices, staffing, supervision, or policies. Addressing these conditions requires leaders to examine existing practices, redistribute resources, remove barriers, or make difficult or unpopular decisions. At the same time, leaders should not predetermine the problems or solutions. Consistent with a human-centered design approach, their role is to create the conditions for staff to participate meaningfully, listen openly to what is learned, and help the organization act on that learning.

Leadership support should be demonstrated through actions, not simply statements of endorsement.

Dimensions of effective implementation leadership

Leadership support involves more than expressing enthusiasm for an initiative. Aarons and colleagues (2014) identify four complementary dimensions of leadership that support effective implementation:

- **Proactive leadership** means anticipating what will be needed for successful implementation, developing plans, clarifying expectations, and addressing potential barriers before they interfere with the work.
- **Knowledgeable leadership** means understanding the initiative and the implementation process well enough to provide useful guidance, answer questions, and help staff navigate challenges.
- **Supportive leadership** means recognizing and responding to staff needs, providing encouragement and practical assistance, and creating conditions that enable people to carry out the work successfully.
- **Perseverant leadership** means maintaining attention and commitment when implementation becomes difficult, competing priorities emerge, or early efforts do not work as expected.

These dimensions describe leadership that supports implementation. Because this toolkit asks staff to help identify problems and design solutions, leaders also need to work **in participatory and transparent** ways. This component includes sharing influence, listening openly, and communicating honestly throughout the process. Leaders must create space for the experiences and expertise of the people most affected by the issue. In this process, leadership support includes not only helping implementation succeed, but also ensuring that staff can meaningfully influence what is identified, designed, tested, and implemented.

Effective leadership does not mean directing every aspect of the process. In a human-centered design approach, leaders need to create space for staff expertise, remain open to findings that challenge existing assumptions or practices, and support learning before determining solutions.

How to assess leadership support

Do not assess leadership support simply by asking leaders whether they support an initiative focused on staff stress and burnout. Leaders may genuinely believe they are supportive, while staff experience their actions differently. Instead, gather perspectives from people who interact with leadership in different roles and who may be affected by organizational decisions. Depending on your setting, input might be gathered through individual conversations, design-team discussions, anonymous surveys, listening sessions, or existing data.

Pay attention to differences in perspective. For example, leaders may believe that staff are encouraged to raise concerns, while staff feel that doing so carries risk. Similarly, a leader may express strong support for staff well-being, while staff see little evidence that time, resources, or organizational practices reflect that priority. These differences help identify specific leadership behaviors or organizational conditions that should be strengthened.

If people do not know whether leadership will support a particular aspect of the work, identify what needs clarification. Uncertainty about who can make decisions, whether resources can be committed, or how leaders will respond to difficult findings can itself become an implementation barrier.

> **The question is not "Do leaders support staff well-being?" The more useful question is "What are leaders prepared to do to support this process?"**

Look for evidence in both stated commitments and observable behavior. Behavioral examples could include:

- Is time actually protected?
- Are staff able to raise concerns?
- Are leaders willing to clarify decision authority?
- Do they follow up when staff provide input?

Tools, Worksheets & Supplemental Resources

The Tools and Worksheets section of the toolkit provides several resources for assessing your school's readiness to move forward with a project. Use the Leadership Support Reflection for discussion and the Leadership Support Assessment for a more structured review.

Sample leadership support challenges

- Belief that staff well-being is not an organizational priority
- Doubt that meaningful working condition changes are feasible
- Concern about costs or other resources
- High workloads and competing priorities
- Concern about criticism or difficult findings
- Inability to adjust staff workloads to commit time for a design team

Strategies for strengthening leadership support

Leadership support is not something a school just has or does not have. It can often be intentionally developed. If the assessment identifies gaps, first try to understand why support is limited. Different barriers require different responses.

GOALS	STRATEGIES
BUILD A SHARED UNDERSTANDING OF THE PROBLEM	Leaders may not fully understand the extent or sources of staff stress. Use available data, staff feedback, examples, and stories to make the problem visible. When possible, combine quantitative information with staff experiences so leaders understand both the scope of the issue and its impact on day-to-day work. Avoid framing this as an effort to convince leaders that a predetermined solution is necessary. The goal is to establish a shared understanding that the issue warrants exploration.
CONNECT THE WORK TO EXISTING PRIORITIES	Show how staff well-being relates to goals leaders already care about, such as staff retention, attendance, instructional quality, student support, organizational functioning, or school climate. Position the work as part of improving the conditions needed for staff and students to thrive—not as an additional program competing for attention.
CLARIFY WHAT LEADERSHIP SUPPORT REQUIRES	A general statement such as "We support staff well-being" is not enough to guide implementation. Concrete requests make it easier for leaders to understand and fulfill their role. Identify the specific behaviors and commitments needed, such as dedicated time for staff, opportunities for candid input, access to relevant information or data, clear guidance related to decision-making, resources to support pilot testing, and clear communication practices.

GOALS	STRATEGIES
CREATE SAFE WAYS FOR LEADERS TO HEAR STAFF PERSPECTIVES	Provide structured opportunities for leaders to learn about staff experiences while protecting staff psychological safety. Depending on the organizational climate, this could mean reviewing anonymous findings rather than having leaders present during initial listening sessions. Leaders should be encouraged to approach staff input with curiosity rather than immediately explaining, defending, or solving.
BUILD LEADERSHIP KNOWLEDGE AND SKILLS	Leaders may support the goal but have limited experience with human-centered design, implementation science, participatory decision-making, or organizational approaches to well-being. Provide orientation and practical guidance, rather than assuming leaders possess these skills. Particular attention should be paid to: listening without defensiveness, responding to difficult feedback, facilitating change, and communicating transparently.
ESTABLISH DECISION AND COMMUNICATION ROUTINES	Decide in advance how the design team and leadership will communicate. Short, predictable check-ins can be used to share what is being learned, identify emerging barriers, clarify decisions, and request needed support. Communication should also flow back to staff. When staff provide input, leaders and the design team should communicate what was heard, what will happen as a result, what cannot currently be changed, and why.

Clarify commitments before proceeding

This process may surface concerns about workload, schedules, staffing, supervision, communication, resource allocation, policies, decision-making, or other conditions that leaders influence. Asking staff to speak candidly about those conditions without knowing whether leaders are prepared to hear and respond to what is learned can damage trust rather than strengthen it. For that reason, the goal is not simply to obtain leadership approval for a "staff well-being initiative." It is to establish enough leadership commitment for the process itself to be credible.

Before moving forward, clarify what leaders are prepared to commit to. Before broad staff engagement, leadership should be prepared to:

- Support inquiry rather than a predetermined solution
- Protect reasonable participation
- Provide credible opportunities for candid input

- Hear difficult findings without immediately dismissing or defending against them
- Consider organizational changes (not only individual wellness supports)
- Clarify what is fixed, negotiable, and outside of the organization's control
- Clarify decision authority
- Provide reasonable access to resources and decision makers
- Explain decisions and close feedback loops
- Remain engaged through testing and adaptation

Tools, Worksheets & Supplemental Resources

Complete the Leadership Summary & Plan, to describe current leadership support, and strategies that will be used to strengthen leadership support if needed.

Learn More

Implementation leadership scale – Use if you are interested in a brief, validated measure of the four dimensions of implementation leadership.

Consolidated Framework for Implementation Research (CFIR) Guide. – Use to learn more about leadership roles and implementation context

Action 4: Build and prepare the design team

Create a team that can carry the process forward

Leadership commitment creates the organizational space for the work. Someone still needs to guide the process. Improving staff well-being should not depend on a small group of administrators deciding what employees need. Working conditions are experienced differently across roles, settings, schedules, and levels of authority. A problem that looks straightforward from one position may look very different from another.

A design team brings those perspectives together and provides continuity across the five phases. Its job is not to speak for every employee or to arrive with the answers. Its job is to guide a process that reaches beyond the team—listening to staff, making sense of what is

learned, identifying missing perspectives, developing and testing ideas, communicating decisions, and helping the organization learn.

The team serves as both a design team and a bridge—connecting staff experience, organizational knowledge, leadership decision making, and the practical work of implementation. The question is therefore not simply "Who should be on the committee?" It is "What perspectives, knowledge, relationships, authority, and lived experience does this process need?"

Design team role

The design team's role evolves across the five-step process. Depending on the stage of the work, members may:

GOALS	STRATEGIES…
GUIDE THE PROCESS	• Plan the work • Keep the process moving • Coordinate across phases
LISTEN AND MAKE SENSE OF INFORMATION	• Identify whose perspectives are needed • Support safe, accessible participation • Synthesize qualitative and quantitative information
DESIGN AND TEST	• Prioritize issues • Generate/evaluate strategies • Anticipate workflow effects and unintended consequences • Support pilot testing and adaptation
CONNECT AND COMMUNICATE	• Connect staff, leadership, and implementation • Close feedback loops, • Monitor whose experiences are represented

Build a team with diverse perspectives

A strong design team should include people who bring different experiences, roles, perspectives, knowledge, and forms of influence. Human-centered design encourages multidisciplinary teams because differences in expertise and ways of thinking can lead teams to frame problems differently and generate less predictable solutions. Research on multidisciplinary teams suggests that differences in knowledge and perspective can broaden

problem framing and idea generation, although the benefits depend on how well teams communicate and share information (Paletz et al., 2010).

The design team should include one or two administrators with authority to make decisions, allocate resources, and remove barriers. However, the team should not be dominated by administrators. A variety of other perspectives should also be included. Some staff may also feel more comfortable offering honest feedback when fewer administrators are present.

There is no single ideal team size. In many settings, a group of roughly 6–12 people may be manageable while still allowing multiple perspectives to be represented. Adjust the size to the scope of the work and the number of perspectives that need direct representation.

In a school or district, consider representation across:

- **Job roles**: teachers, paraprofessionals, student support professionals, administrative/ office staff, operations or facilities staff, and administrators;
- **Work settings**: different schools, grade levels, departments, programs, shifts, or locations;
- **Experience**: newer employees as well as long-tenured staff;
- **Organizational perspectives:** people with formal authority as well as people who experience policies and practices on the front line;
- **Formal and informal influence:** respected staff members or opinion leaders can be important even when they do not hold formal leadership positions;
- **Experiences and perspectives:** people whose experiences may differ because of work responsibilities, schedules, access to resources; and
- **Skills and knowledge:** people who bring strengths in listening, facilitation, data, communication, implementation, creative problem solving, or project coordination.

Representation does not require every perspective to have a permanent seat on the team. Some perspectives may be better incorporated through consultation, listening sessions, or targeted outreach.

Representation: More than a seat at the table

Simply assembling a demographically or professionally diverse group does not ensure that diverse perspectives will shape the work. The potential benefits of a diverse team also depend on whether members experience enough psychological safety to raise concerns, question

assumptions, acknowledge uncertainty, and offer perspectives that may differ from those of leaders or other team members (Edmondson, 1999).

Helpful characteristics for design team members

- **Curious and empathetic**: Listens before assuming
- **Practical:** Understands workflows, constraints, and implementation realities
- **Constructively questioning:** Surfaces risks and challenges assumptions without shutting down possibilities
- **Collaborative and credible:** Works across perspectives and has trusted connections with colleagues
- **Able to follow through:** Has enough time and capacity to contribute

A strong design team needs diversity not only in roles and experiences but also in ways of thinking and contributing. You do not need every team member to possess every characteristic. Instead, look for a combination of people who collectively bring different strengths.

Pay attention to power differences within the group. Staff may be less willing to challenge assumptions or speak candidly when supervisors or senior leaders are present. Establish team norms that encourage questions, disagreement, uncertainty, and respectful challenge. Consider when leadership participation is valuable and when staff may need opportunities to work or provide input without supervisors present.

Psychological safety cannot be created by a team norm alone. Formal authority, supervisory relationships, job security, and previous experiences with speaking up can affect whether people feel able to disagree or raise concerns.

Remember that the design team cannot substitute for broader staff engagement. Even a thoughtfully selected team will have blind spots. Throughout the process, ask: Whose experience are we not hearing? Who might experience this problem or a proposed solution differently? This broader staff engagement will be the primary focus of the next phase of the staff well-being initiative.

Equity Check

Consider equity as you look at the membership of your design team. Who is affected by stress and burnout? Who could benefit from an effort to reduce staff stress? Who may not benefit? Whose experiences might be hidden by averages or missed unless the team seeks them out deliberately? Who can participate safely and conveniently? Whose schedule, role, location, language, or employment arrangement makes participation harder? Who has meaningful influence over the situation?

Burden Check

We cannot improve staff well-being by creating a large new participation burden. Use existing meetings when appropriate, compensate or protect time when possible, and ask only for participation that can meaningfully influence the work. As you create and move forward with a design team, consider whether you are reducing burden, or just moving it to someone else.

Tools, Worksheets & Supplemental Resources

The Tools and Worksheets section of the toolkit provides several resources for assessing your school's readiness to move forward with a project, including: (1) A set of reflection/discussion questions (Reflection: Do we have a design team prepared to lead this work?); and (2) A Design Team Assessment. The results of your assessments can be summarized in the Design Team Summary. We also provide a template for your design team to create a Team Charter. You do not need to use all four tools.

Examples

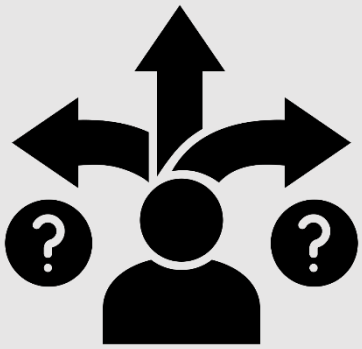
Review the four case examples to see how different readiness challenges affect what happens next. The examples include limited leadership support, low capacity despite strong motivation, concern about student behavior, and a situation in which the problem itself implicates leadership practice. See how Phase 1 unfolded for Oak Ridge Elementary School, Riverview Middle School, North Valley K-8 School, and the Cedar Grove School District.

Phase 1 review

Before moving ahead to Phase 2, pause and assess your status. Are the conditions strong enough to begin asking staff to invest their time, candor, and trust in this process? Have any issues emerged that need to be addressed before moving on to Phase 2?

> **Readiness is something to revisit, not something to check off. Conditions can strengthen or deteriorate as staffing, leadership, priorities, resources, and experience change.**

Decision Gate: Are we ready enough to begin learning from staff, and do we have a plan to address readiness challenges?



MOVE FORWARD

The foundation is strong enough; readiness gaps can be monitored and addressed as the work continues.

MOVE FORWARD WHILE STRENGTHENING

Important gaps remain that need to be addressed, but we have a plan for addressing them and they do not prevent meaningful staff engagement.

PAUSE AND STRENGTHEN FIRST

One or more conditions could seriously undermine trust, participation, or the organization's ability to respond. These conditions should be addressed before asking staff for input.

Once the foundation is strong enough to proceed, the team's attention shifts outward. Phase 2 begins by listening broadly to staff—not yet to confirm a preferred solution, but to understand what people are experiencing, what helps them do their work well, where strain is occurring, and which concerns deserve deeper attention.

Tools, Worksheets & Supplemental Resources

Before moving on to Phase 2, update your Staff Well-Being Plan. For Phase 1, record:

- why this work began and relevant context;
- the most important readiness strengths and concerns;
- actions being taken to strengthen readiness;
- leadership commitments and decision authority;
- who is represented on the design team and whose perspectives still need to be sought; and
- why the team decided to move forward, move forward while strengthening, or pause.

PHASE 2: Understand staff experiences

CENTRAL QUESTION

What are staff experiencing, what appears most important, and where should we focus deeper attention?

Phase 1 established the conditions for staff to participate meaningfully in the process. Phase 2 turns the team's attention outward. The goal is to understand how staff experience their work: what helps them do their jobs well, where strain occurs, what gets in the way, and how those experiences differ across roles, settings, and groups.

Schools rarely begin this phase knowing nothing. Staff may already be talking about workload, planning time, student behavior, staffing, supervision, communication, or another concern. Existing survey results or other organizational information may point in a similar direction.

Treat these as starting points, not conclusions.



A concern that sounds straightforward may reflect very different experiences. For example, "not enough time" might mean that staff simply have too much work. It might also reflect other issues, such as meetings, staffing shortages, inefficient processes, or coverage responsibilities.

Staff may experience the workplace differently. A process that works fairly well for teachers may create difficulty for paraprofessionals or specialists. A support system available during the school day may be less accessible to transportation, food-service, custodial, or after-school staff. An average survey score may therefore conceal important differences.

Phase 2 combines **breadth, depth, and context**. Broad surveys help identify patterns. Interviews and listening sessions help explain how staff experience these patterns. Observation and other workplace data help show how work actually happens. Together, these sources can help the team identify a meaningful priority for deeper investigation.

The purpose is not yet to determine the underlying contributing conditions or choose a solution. That work comes in Phase 3. During this phase, your school or district will:

1

IDENTIFY WHAT YOU NEED TO LEARN

Review available data and determine what you still need to learn.

2

COLLECT BROAD INFORMATION FROM STAFF

Use a survey to gather information about staff experiences and stressors.

3

LISTEN MORE DEEPLY TO STAFF EXPERIENCES

Use your survey results as a starting point to dig deeper into the "why" using strategies such as interviews or listening sessions.

4

OBSERVE HOW WORK ACTUALLY HAPPENS

Supplement the staff input with strategies to observe and map stressors as they actually occur in the workplace.

5

BRING DIFFERENT SOURCES TOGETHER

Triangulate the information gathered and integrate into a clear picture of staff experiences and the most significant sources of stress.

By the end of this phase, the team should have:

- broad input about staff experiences;
- a clearer understanding of strengths as well as concerns;
- awareness of meaningful differences across roles, settings, schedules, and groups;
- deeper information about experiences that appear especially important;
- relevant observational, operational, or contextual information where useful;
- awareness of perspectives that may be missing or less visible; and
- a small number of issues that may be especially important to address.

Action 1: Identify what you need to learn

The main goal in Phase 2 is to learn how staff are experiencing the workplace. It can be tempting to start by saying "Let's send out a staff survey." However, it is important that data collection be as meaningful and efficient as possible. Instead of starting with data collection, start by figuring out what you need to learn.

Identify a small number of questions the team needs to answer now, so that they will know where to focus later. Depending on what is already known, these might include:

- What aspects of work most help staff succeed, and what causes the greatest strain?
- Are concerns widespread or do they only affect particular staff?
- When and where do problems tend to occur?
- What happens when staff need help?
- What strengths, resources, relationships, or routines are already helping?
- Where do staff experiences differ in ways that averages could conceal?

For every proposed question, consider what might we do differently depending on the answer. If the answer would not inform any decision, reconsider collecting the information.

Review what you already know

A lot of information is collected and tracked in schools. Before asking staff for new information, review information the school or district already has. Potential sources include:

- previous climate, engagement, or well-being surveys;
- exit or stay interviews;
- previous listening sessions;
- staffing and vacancy information;
- turnover and retention patterns;
- absence information;
- schedules;
- workload or caseload information;
- substitute and coverage data;
- student-support or referral data;
- incident or safety data;
- previous improvement-team findings;
- existing organizational assessments; and
- concerns or strengths already documented through other school processes.

These sources can help refine the team's questions, but they should be interpreted cautiously. Absenteeism does not automatically indicate burnout. A high number of student-support requests does not necessarily indicate poor classroom management. A low number of requests does not necessarily mean staff do not need help.

Operational data can show what happened. They rarely explain why.

A broad question becomes useful when the team asks what evidence would help answer it.

IF WE WANT TO UNDERSTAND...	WE MIGHT ASK STAFF...	WE MIGHT ALSO EXAMINE OR OBSERVE...
Whether staff have enough usable time	What work spills beyond scheduled hours? What interferes with protected time?	Scheduled vs. usable planning time, interruptions, meetings, coverage, after-hours work
Why workload feels unmanageable	Which responsibilities consume the most time or energy? What seems duplicative or low-value?	Required tasks, documentation, approval steps, duplicated work, meeting demands, initiative requirements
Whether staff can obtain help when student needs escalate	When do you need help? What happens when you request it?	Requests, response pathways, response times, support-staff availability, high-demand periods
How staff experience supervision	When do you feel well supported? What guidance or feedback is useful? What happens when you raise concerns?	Check-in structures, supervision routines, communication pathways, follow-through
Whether newer staff receive needed support	Where do you go for help? What support was missing when you began?	Orientation, mentoring, coaching, access to experienced staff and supervisors
Whether organizational change is creating cumulative burden	What has been added? What has stopped? Which changes require the most learning or coordination?	Active initiatives, trainings, meetings, deadlines, documentation requirements

The goal is not to collect everything in the final column. Rather, we want to collect enough information to make the next decision responsibly, without trying to eliminate all uncertainty. In other words, we want to make a reasoned decision about priorities and potential strategies but do not want to endlessly collect information.

Tools, Worksheets & Supplemental Resources

This toolkit includes a template for a Staff Engagement Plan. The template provides a format for documenting: (1) what we need to know; (2) the experience or source of the information needed; (3) the method that will be used to gather the information; (4) a description of who may be missed; and (5) a description of how the information will be used.

Action 2: Collect broad information from staff

Broad staff input helps the team understand the landscape before narrowing its attention. Start by developing a picture of how staff are doing and what they are experiencing at work. The goal at this stage is breadth rather than depth: to identify patterns, differences, and potential areas that deserve closer attention.

You may already have useful information. Staff climate surveys, well-being data, human resources data, attendance patterns, workload information, and other routinely collected data can all be useful. A brief staff survey can help fill important gaps, particularly if existing data do not address the workplace experiences and conditions that may affect staff well-being.

A survey can be particularly useful when the team needs to understand how common particular experiences are, identify patterns across a large group, or compare experiences across roles or settings. It is also a helpful strategy for providing an anonymous way for staff to participate.

Who should be included?

If possible, include all staff in the survey, not just those working in the classrooms. Including all staff ensures that everyone can share their experiences. You may identify issues that you were not aware of among staff who have fewer opportunities to provide input into the school environment or their own work experiences.

Provide enough time for everyone to complete the survey, and offer multiple invitations to do so. Some staff have less access to email, computers, meetings, or discretionary time. Consider strategies to reduce these barriers as much as possible.

Use an existing survey or create your own?

You do not necessarily need to create a survey from scratch. Existing survey tools are available, including some that can be accessed at no cost. There are some advantages of using an

existing survey. Existing instruments may offer tested items, useful domains, comparison information, or a structured way to assess working conditions. At the same time, no single instrument will necessarily answer the specific learning questions identified by your team.

Before selecting an instrument, ask:

- What does it measure?
- Who was it developed and tested with?
- Does it include the staff whose experiences we need to understand?
- Does it assess workplace conditions, individual well-being, or both?
- How long will it take?
- Can we adapt it, or must it be administered as written?
- Will the results help us make the decision ahead?

Include both structured and open-ended questions

Most existing surveys provide an initial set of structured questions, such as questions that use a consistent rating scale. In addition to these questions, give opportunities for staff to identify concerns or strengths the team may not have considered.

For example, you could ask:

- What currently helps you do your job well?
- What most interferes with your ability to do your job well?
- If one aspect of your work environment could be improved, what change would make the greatest positive difference?
- Is there anything important about your experience at work that we did not ask about?

Reviewing the results

Look for patterns among the responses. Where numbers are large enough to maintain confidentiality, examine patterns across relevant roles, work settings, career stages, or other groups. What concerns appear especially common or significant? What seems to be going well? Do experiences differ across staff roles, buildings, departments, career stages, or other groups? Are there issues that appear repeatedly across different sources of information?

While it is important to examine patterns, do not create subgroup reports so small that individuals can be identified. Maintain confidentiality, so that everyone feels safe providing open feedback.

Resist the temptation to explain patterns too quickly. A survey might show that staff have too little time to complete their work, but may not tell you what creates that pressure. Similarly, differences between groups does not reveal what accounts for those differences. Treat findings as starting points for further exploration, not conclusions. They can help your team identify what needs a closer look and whose experiences you need to understand more fully.

Existing Tools to Explore

Organizational well-being inventory for schools (OWBI-S). Developed by the National Center for School Mental Health and available through the SHAPE System, this 52-item measure assesses eight dimensions of organizational well-being, including work climate, autonomy, professional development and recognition, supervisory support, equity and inclusion, purpose and meaningfulness, and professional quality of life. It is particularly useful for schools seeking to examine organizational conditions that may support or undermine staff well-being. See SHAPE description of the OWBI-S and Printable OWBI-S instrument.

Whole-school staff well-being evaluation tool (Lester et al., 2020). Developed and validated using data from 801 employees across six Australian schools, this measure examines staff relationships, engagement, emotional well-being, and school climate. The survey was specifically designed for employees in different school roles rather than focusing exclusively on classroom teachers. See Open-access article and instrument information.

Teacher working conditions surveys and item banks (Regional Educational Laboratory Northwest, 2026). Teacher working conditions surveys can provide useful questions about organizational factors such as leadership, professional learning, resources, time, workload, autonomy, and instructional support. The Institute of Education Sciences Working Conditions Survey Question Bank is a useful source for selecting or adapting individual items rather than adopting an entire instrument. State teacher working conditions surveys, such as North Carolina's, provide additional examples. These resources are primarily designed for teachers, however, and may not adequately capture the experiences of other staff. See IES Working Conditions Survey Question Bank and guidance and North Carolina Teacher Working Conditions Survey information.

Tools, Worksheets & Supplemental Resources

A sample survey is included in the toolkit. The sample survey is an adaptable tool that can help translate your areas of interest into potential questions. It has not been validated as an instrument. If your need a more formal measure of an established construct, such as burnout or organizational readiness, consider using an appropriate validated instrument.

Action 3: Listen more deeply to understand staff experiences

A survey can identify patterns but rarely tells the whole story. Suppose 60% of staff report that they cannot complete essential work within available time. That finding is important. However, it does not tell the team what work is consuming the time, when the problem occurs, why it occurs, whether different staff experience it differently, or what happens as a result.

Listening sessions, interviews, small-group conversations, and other opportunities for dialogue allow staff to describe their experiences in their own words. These conversations can help you understand what workplace conditions are contributing to an issue, how those conditions affect staff, what makes the situation better or worse, and what staff believe would make a meaningful difference.

For example, if broad data show that many staff report inadequate time to complete their work, deeper listening might reveal different reasons. These reasons my include frequent meetings, difficulty finding coverage, interruptions during planning periods, documentation requirements, expectations for communication outside the workday, or other issues. Those distinctions matter because they point toward very different opportunities for change.

Use these conversations to explore—not to confirm—a theory your team has already developed. Listen for experiences that complicate your initial interpretation as well as those that support it. Pay attention to variation: the same workplace condition may affect different staff members in different ways.

Be especially intentional about whose voices you hear. A voluntary listening session may disproportionately attract staff who have strong opinions, flexible schedules, or greater comfort speaking in a group. Consider additional ways to hear from staff whose perspectives might otherwise be missed, including people in roles or shifts that make participation difficult and staff who may be less comfortable sharing concerns publicly.

The goal is not to collect every possible story or reach perfect agreement. It is to develop a sufficiently rich understanding to begin identifying the conditions that may be contributing to issues and that your school or district may be able to influence.

Think depth: What is behind the patterns we are seeing? How do staff experience the issue in their day-to-day work? What conditions contribute to it? What are we missing or misunderstanding? Specific examples often reveal processes and conditions that broad opinions do not. For instance, instead of asking "do staff need more planning time?" we can ask "Tell me about a recent day when you did not have enough time to complete your work."

You can then follow up for more specific information, such as:

- What were you trying to accomplish?
- What happened?
- What made it difficult?
- What happened to the work you couldn't complete?
- Is that typical or unusual?

Interview or listening session?

Interviews and listening sessions serve different purposes. Individual interviews can be especially useful for sensitive topics, experiences involving supervision or power, employees in roles represented by relatively few people, or situations in which detailed individual experiences matter. In contrast, group listening sessions allow staff to hear and respond to one another and identify shared and differing experiences.

Groups require thoughtful composition. Staff may be less candid when supervisors are present or when substantial power differences exist. In some circumstances, separating groups by role or supervisory relationship may produce more useful information (Hamilton & Finley, 2019).

Tools, Worksheets & Supplemental Resources

The toolkit provides a Sample Interview/Listening Session Guide. As was the case with the survey, this is intended only as a guide. The specific questions should be written to more deeply explore the specific issues that were identified in the survey.

An interview or listening session allows flexibility to ask follow-up questions as needed. Often, interviewers or group facilitators need to "probe" for more detailed information, especially when initial responses are vague or incomplete. It is important that these follow-up probes are expressed neutrally, and without leading respondents to specific answers (DeJonckheere & Vaughn, 2019).

Sample neutral probes include:

- Tell me more about that.
- Can you give me an example?
- What happened next?
- Is that typical?
- When does it work differently?
- What makes that important?
- Who else might see this differently?

Choose the facilitator carefully

Who facilitates a listening session or interview can significantly affect what staff are willing to share. Choose someone who is skilled in facilitating sensitive conversations, able to remain neutral, and trusted by participants.

The facilitator should be able to ask open-ended questions, invite quieter voices into the conversation, respectfully redirect participants when needed, tolerate silence and discomfort, and probe for additional information without leading participants toward a particular answer. Just as importantly, the facilitator needs to hear difficult or critical feedback without becoming defensive or trying to explain it away.

Consider the facilitator's relationship to participants and to the issues being discussed. A principal, supervisor, or member of the design team may be well intentioned but may also be directly connected to policies, decisions, or working conditions that staff want to discuss. Their presence can unintentionally influence what people are willing to say. Sometimes, a facilitator from outside the school or district may make it easier for staff to speak candidly.

An outside facilitator is not automatically the best choice, however. Trust matters as much as independence. Staff may be reluctant to share openly with someone they do not know or whose role and intentions are unclear. When using an external facilitator, explain who the

person is, why they were selected, what information they will share with the team, and how participants' confidentiality will be protected.

The facilitator's role is to understand staff experiences, but not to evaluate or resolve them in the moment. Do not use the session to explain why a policy exists, correct a participant's interpretation, defend a decision, persuade staff that conditions are better than they perceive them to be, or promise a solution.

This does not mean that every interpretation offered during a listening session should automatically be treated as fact. It means that the facilitator first seeks to understand the experience behind it. Questions such as “Can you tell me more about what happens?”, “How does that affect your work?”, or “Does anyone experience this differently?” can deepen understanding without validating or disputing a particular conclusion.

Difficult feedback is information for improvement, not automatically an accusation about individual intent or effort. A skilled facilitator can acknowledge the impact of an experience without assigning blame, becoming defensive, or prematurely deciding what caused it.

Action 4: Observe how work actually happens

By this point, you have begun to build a picture of staff well-being through broad information gathering and deeper listening. Staff have told you what they are experiencing and helped you understand conditions that may be contributing to those experiences. That may be enough to move forward. However, in many cases, it is useful to take one more step: look more closely at how the work actually happens.

There can be important differences between how work is designed, how it appears on paper, and how it is experienced in practice. A schedule may show that a teacher has 45 minutes of protected planning time, while staff tell you that they rarely experience it as 45 usable minutes. A closer look might show that the period is routinely interrupted by student needs, coverage requests, transitions, communication, or other responsibilities.

Similarly, a school may have a clearly defined process for requesting behavioral support but staff report difficulty getting timely help. Examining what happens from the moment help is requested can show where requests stall, how information moves, what happens when the designated person is unavailable, and what informal workarounds staff have developed.

These methods can be particularly useful for understanding concerns involving time, interruptions, workload, workflow, handoffs, access to support, physical conditions, and the accumulation of demands across a workday. They can also make hidden work more visible,

including work performed after hours, emotional or relational demands, and the many small tasks that individually seem manageable but collectively create substantial burden.

Observe the system, not the employee

The purpose is not to determine whether an individual employee is working efficiently or performing appropriately. The focus is on understanding the conditions surrounding the work. Start with a question, not a method. What are you trying to understand that you do not yet know? Then choose the simplest approach that can help answer that question.

Depending on what you are trying to learn, useful approaches might include:

- **Direct observation.** Observe a defined process or period of work. For example: How often is protected planning time interrupted? What happens during arrival, dismissal, lunch, recess, or another particularly demanding part of the day? What happens after a staff member requests assistance?
- **Time or activity tracking.** Ask staff to briefly record what happens during a defined period. Comparing what someone intended to do with what actually happened can reveal the difference between **scheduled time and usable time** and identify work that is displaced into evenings, weekends, or other periods.
- **Interruption or event tracking.** Rather than documenting an entire workday, focus on a particular type of event. For example, staff might record interruptions during planning periods or what happens when they request behavioral support. This can help identify patterns that are difficult to estimate retrospectively.
- **Process mapping.** Follow a recurring process from beginning to end, such as a referral, coverage request, behavior-support request, documentation requirement, or purchasing process. Ask where work is delayed, where responsibility is unclear, where steps are duplicative, what happens when someone is unavailable, and what workarounds staff have created.
- **Work shadowing.** Follow a staff member or role through part of a workday to understand how demands accumulate. Shadowing can be particularly useful for work that may be less visible, such as the work of paraprofessionals, nurses, counselors, office staff, custodians, transportation staff, food-service staff, behavior-support staff, or administrators.
- **Environmental walkthroughs.** Walk through work settings with staff and explore how the physical environment supports or interferes with their work. Depending on the issue, consider noise, temperature, workspace, privacy, travel between locations, access

to materials, bathrooms and break spaces, safety, technology, or proximity to needed support.

- **Existing operational information.** Sometimes you do not need to observe work directly. Schedules, meeting calendars, coverage records, caseloads, referrals, requests for assistance, response times, overtime records, incident reports, required forms, work orders, active initiatives, or training requirements may help make patterns visible.

You do not need to use all - or even several - of these approaches. A short interruption log may answer one question better than hours of observation. A simple process map may reveal more about a problem than another round of survey questions. Let the question determine the method, and keep the data collection burden proportionate to what you need to learn. A method designed to understand workload should not itself become significant work.

Interpret what you see with staff

Looking at work can help you see **what happens**, but it does not necessarily tell you **what it means or why it happens**. Staff who do the work are essential to interpreting what you observe.

For example, suppose a process map shows that staff frequently bypass a formal procedure for requesting assistance and contact a particular colleague directly. It would be easy to conclude that staff simply are not following the established process. Staff may instead explain that the process takes too long when a situation is urgent, that they do not know whether anyone has received the request, or that previous requests have gone unanswered.

Bring observations back to staff and ask: Does this reflect your experience? What are we missing? What explains what we are seeing?

Protect trust when examining work

Looking closely at someone's work can easily feel like evaluation, even when that is not the intent. This is particularly important when supervisors or administrators are involved in collecting the information.

Before beginning, explain what the team is trying to learn, why the method was chosen, what will and will not be recorded, who will see the information, whether individuals will be identifiable, and how findings will be summarized. Be explicit about how information will be kept separate from employee performance evaluation.

Whenever possible, involve staff in deciding what should be examined and how. People who do the work often know where the difficult moments occur, what is invisible to others, and which processes deserve a closer look.

The goal is not to scrutinize staff. It is to make the work itself more visible so that the team can better understand the conditions it may ultimately need to change.

Tools, Worksheets & Supplemental Resources

The tools section in the back of the toolkit includes resources for conducting each of these potential methods.

Action 5: Bring different sources together

Your team may now have information from surveys, listening sessions, observations, operational data, and other sources. Each provides a different view of staff experience; none tells the whole story. The goal is to ask what they collectively suggest about staff experiences and the conditions surrounding their work.

Triangulate—do not simply accumulate

Consider a school where staff have raised concerns about inadequate planning time.

A survey might show how widespread the concern is. A time diary might show what happens during scheduled planning periods. Listening sessions might reveal which interruptions create the greatest difficulty and how staff respond. A schedule review might show how much planning time is formally allocated. Direct observation might show how much of that time is reliably usable.

These sources are not five different ways of asking staff to prove that planning time is a problem. They answer different parts of the question.

Together, they might reveal a more useful picture than simply "staff need more planning time." Perhaps adequate time is scheduled but is routinely lost to coverage. Perhaps interruptions are concentrated in particular grades or roles. Perhaps special educators have the same scheduled planning time as other teachers but spend more of it completing required documentation. Perhaps one team has developed a routine that protects planning time particularly well.

The purpose of triangulation is to allow different forms of information to illuminate different parts of the experience.

Pay attention to both agreement and disagreement

As you bring information together, look first for places where different sources tell a similar story. These areas of convergence can increase confidence that you are seeing an important pattern (Carter et al., 2014). But do not discard information simply because it does not fit the dominant pattern. Disagreement itself may be an important finding.

Leaders and staff may experience the same communication process very differently. A schoolwide survey average may suggest that workload is manageable while interviews reveal higher strain among paraprofessionals or special educators. A written procedure may appear straightforward while observation shows that staff routinely rely on informal workarounds to make it function.

When information differs, get curious rather than deciding immediately which source is "right." The design team should consider questions such as:

- Where do different sources tell a similar story, and where do they differ?
- Whose experiences are represented in each source?
- What appears widespread, and what is concentrated in particular roles, settings, shifts, or groups?
- Where does work seem to go better, and what strengths or helpful practices should be protected?
- What remains unclear or needs further exploration?

The goal is not to force information into a single, consistent story. It is to develop a picture that **is accurate enough to reflect both common patterns and meaningful differences in staff experience.**

Look beyond the schoolwide average

School staff do not all experience the workplace in the same way. Schedules, responsibilities, autonomy, physical demands, access to information, relationships with supervisors, exposure to stressful situations, and opportunities for breaks or recovery can vary substantially across roles. For that reason, a schoolwide average can sometimes conceal as much as it reveals.

One way to make these differences visible is to develop brief staff experience profiles based on the information you collected. For example:

- A paraprofessional experience profile might describe the major demands paraprofessionals encounter during the day, how much input they have into decisions that affect their work, when and how they can access help, and the transitions or recurring friction points that add to their workload. It might also identify practices or conditions that make the work easier and points in the day when demands tend to accumulate.
- A new classroom teacher experience profile might describe the demands new teachers are managing, whether they have adequate and reliable planning time, the mentoring and other professional support available to them, and their experiences accessing student support. It might also examine family communication responsibilities, what helps them manage their work, and when or why work tends to spill into evenings or weekends.
- A school counselor experience profile might describe caseload and scheduled responsibilities alongside the unscheduled or crisis-related demands that arise during the day. It might examine documentation requirements, clarity of role boundaries, competing responsibilities, and whether counselors have opportunities to recover after periods of particularly intensive work.

These profiles are not fictional personas created by the design team. They are evidence-based composites that summarize patterns emerging from the information you collected. They should also be used cautiously. A profile can help make a pattern visible, but it does not define everyone in a group. Two staff with the same roles may experience the same workplace very differently.

Build a shared picture of what you have learned

Finally, summarize the major themes emerging across your information sources. You do not need to resolve every inconsistency or answer every question before moving forward. Instead, capture what the team currently understands, what appears important, where experiences differ, what is already helping, and what remains uncertain.

Tools, Worksheets & Supplemental Resources

The Tools and Worksheets section contains a simple Staff Experience Synthesis to help organize this discussion. For each major theme, record findings, who appears most affected, what helps, what is still not understood, and what warrants deeper investigation.

Do this work with staff, not only about staff. Invite staff to review the emerging picture and ask: Does this reflect your experience? What have we misunderstood? What is missing? Where have we overgeneralized?

At the end of this phase, you should have a sufficiently clear and nuanced understanding of staff experiences to decide which concerns deserve closer attention. In Phase 3, you will use that understanding to identify and prioritize the issues that the team will carry forward for deeper analysis.

Phase 2 review

Before moving into Phase 3, consider the following questions:

- Can the team describe what staff are experiencing without prematurely assigning a cause?
- Have you identified strengths as well as sources of strain?
- Have you examined differences across roles, settings, schedules, or groups rather than relying only on averages?
- Have people whose experiences matter had a reasonable opportunity to participate?
- Have you used only as much data collection as the decision requires?
- Can you identify the concerns that appear to warrant deeper investigation?
- Can staff see how their input influenced what happens next?

Equity Check

Whose experiences shaped the picture you developed? Whose may still be hidden? Did the methods make it equally possible for different staff to participate? Could schedules, technology access, language, job role, power differences, or confidentiality concerns have made some staff

easier to hear than others? Do the concerns that may warrant deeper investigation affect different staff differently?

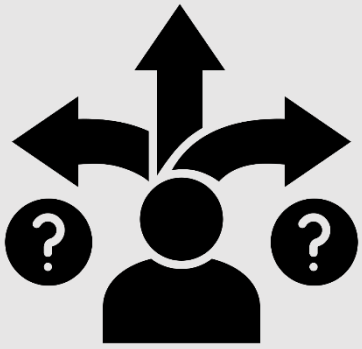
Burden Check

What work did participation create? Did you ask staff for information the organization already had? Did repeated surveys, meetings, interviews, or logs ask people to describe the same problem without adding useful information? Before collecting another source, did you ask whether the information will change what you understand or decide?

Examples

Check in with the examples in the back of the toolkit to see what Oak Ridge Elementary School, Riverview Middle School, North Valley K-8 School, and Cedar Grove School District did in Phase 2. Read about the strategies that they used to hear from staff, what they learned, and how that will shape how they move forward in their efforts to promote staff well-being.

Decision Gate: Do we know enough to identify a priority for deeper investigation?



MOVE FORWARD

The team has enough information to select a priority and explain why it warrants deeper investigation.

MOVE FORWARD WHILE ADDRESSING GAPS

Some information gaps remain, but the priority is sufficiently clear and those gaps can be addressed in Phase 3.

PAUSE, RETURN, OR CONTINUE LEARNING

The information is too weak, contradictory, inequitable, or incomplete to select a priority responsibly.

Phase 2 identifies **where to focus, but** it does not yet establish why the concern exists or what should be done about it. Phase 3 takes us further by determining:

- What issues should be prioritized for action?
- What appears to be contributing to these issues?
- What strengths should be protected?
- What is within the organization's influence?
- What specific workplace factor or process should become the target for change?

Tools, Worksheets & Supplemental Resources

Before moving on to Phase 3, update your Staff Well-Being Plan. This document provides a comprehensive summary of your staff well-being initiative. For Phase 2, there are sections that can help you document patterns in what staff are experiencing, identified issues warranting deeper investigation, and significant issues that will be carried into Phase 3.

Learn More

The following resources provide practical guidance for planning and conducting staff inquiry. The University of Kansas Community Tool Box includes many useful resources to support community-based data collection through a variety of methods. Some especially useful resources include:

Qualitative methods to assess community issues - Practical guidance on selecting and using interviews, group interviews, observation, records, and other qualitative methods.

Conducting focus groups - Detailed guidance on planning, facilitating, and interpreting focus groups, including question development and facilitation considerations.

Data collection: Designing an observational system - Guidance for deciding what to observe, how to record it, and how to use it to answer evaluation and learning questions.

Windshield and walking surveys - Although written for community assessment, this resource provides a useful model for systematic environmental observation.

PHASE 3: Prioritize issues & select potential strategies

CENTRAL QUESTION

What should we focus on, what appears to be contributing, what should change and what strategy is promising to try?

Phase 2 helped the team build a clearer picture of staff experiences. You may now have several concerns that seem important, such as insufficient planning time, workload, student behavior, staffing shortages, weak supervision, communication problems, or something else. Phase 3 moves from understanding experience to deciding where and how to act.

Prioritization requires more than choosing the issue staff rated most negatively on a survey. The team needs to decide which concern warrants focused attention, look beneath the surface to understand what may be contributing to it, identify a workplace condition that can reasonably be changed, and then consider strategies that fit what the team has learned.



Do not begin with the strategy. A school that hears "we don't have enough planning time," for example, could immediately add planning periods. But the underlying problem might be that existing planning periods are routinely lost to coverage, meetings, or student-support responsibilities. It might be unnecessary paperwork or inefficient processes. It might be staffing shortages. It may also be that the amount of necessary work simply exceeds the time available.

Each explanation points toward a different response.

Look beneath the symptom—but do not assume there is only one underlying cause.

Change efforts often encourage an analysis of underlying "root causes." Complex workplace problems rarely trace to one source, however. The toolkit therefore uses the broader language of **contributing factors**. The goal is not to identify a single definitive cause, but to understand the conditions producing or sustaining the problem well enough to make a responsible decision about what to change (Institute for Healthcare Improvement, 2015; U.S. Department of Education, 2026).

Moving too quickly from an identified concern to a preferred solution can result in strategies that address a symptom rather than the conditions producing it. Identifying contributing factors provides a bridge between identifying a need and selecting an appropriate response (U.S. Department of Education, 2026).

During this phase, your school or district will:

1. **PRIORITIZE AN ISSUE FOR DEEPER INVESTIGATION**
   Decide which issue warrants focused attention now
2. **DEVELOP A CLEAR PROBLEM STATEMENT**
   Describe the problem to be addressed without assuming solutions
3. **INVESTIGATE CONTRIBUTING FACTORS**
   Assess factors that may be contributing to the identified problem
4. **SELECT A TARGET FOR CHANGE AND IDENTIFY PROMISING STRATEGIES**
   Select a potential strategy that aligns with the contributing factors and fits the school context

By the end of Phase 3, the team should be able to explain:

- what issue it has chosen to address and why;
- who is affected and how experiences differ;
- what appears to be contributing to the problem;
- which explanations are supported by available information and which remain assumptions;
- what strengths or helpful conditions should be protected;
- what part of the problem is reasonably within the organization's influence;
- what specific condition or process the team wants to change;
- which potential strategies directly address that target; and
- what important assumptions will need to be tested in Phase 4.

Tools, Worksheets & Supplemental Resources

Four tools can help your team move through this phase. The Priority Selection Guide helps you compare the concerns that emerged from Phase 2 and select one for focused attention. The Contributing Factors Analysis helps you investigate what may be producing or sustaining the problem. The Target for Change Worksheet helps you decide which contributing condition is most important and feasible to address, while the Strategy Evidence & Fit Guide helps you compare possible strategies. In addition to these worksheets, we provide a sample format for a Fishbone Diagram.

You do not need to complete every tool in full. Use the ones that help your team make a better decision, and carry useful information forward. The goal is to develop enough shared understanding to make a thoughtful choice about what to test.

Action 1: Prioritize an issue for deeper investigation

Phase 2 may have surfaced several legitimate concerns. Resist the temptation to address all of them at once. Prioritization does not mean that other concerns do not matter. It means deciding where focused attention is most likely to produce meaningful learning and improvement now.

Return to the Staff Experience Synthesis from Phase 2. Review the themes that appeared important enough to warrant deeper investigation. For each, consider several questions.

How significant is the concern?

Consider how strongly the issue appears to affect staff well-being or their ability to do their work well. A concern does not need to affect everyone to be important. A problem experienced intensely by a smaller staff group may warrant attention even if it disappears in schoolwide averages.

Ask:

- **How serious are the consequences?** Does the concern create frustration, or does it routinely interfere with staff members' ability to do their jobs? Is it associated with exhaustion, safety concerns, lost work time, turnover, or difficulty meeting student needs?
- **How widespread is it?** Does the concern affect most staff, one particular role, one building, one shift, or employees in particular circumstances?
- **How persistent is it?** Is this a temporary difficulty, a recurring problem, or a longstanding feature of the work environment?
- **How important is the issue to staff?** When asked to provide input, how often do staff identify the issue as important to them?

Staff input should matter in prioritization. This does not mean holding a vote and selecting the concern with the most votes. Staff may not have all of the information needed to assess feasibility or organizational impact, and a majority vote can obscure serious concerns affecting smaller or less powerful groups. However, it is also important to show that their feedback influenced the decision. If the design team decides not to move forward with something that staff have emphasized, communicate the decision clearly and share the rationale.

> **Consider whether the issue is recognizable and meaningful to the people whose work is most affected.**

Equity Check

Before selecting the most common concern, ask for whom it was most common. A schoolwide average can make a serious problem affecting paraprofessionals, counselors, transportation staff, custodians, food-service employees, newer teachers, or another group appear relatively small. Consider intensity and consequences alongside prevalence.

Is there a realistic opportunity for improvement?

Teams should not limit themselves only to easy problems. But they should consider whether focused work could make a difference.

Ask:

- Is at least part of the problem within school or district influence?
- Is leadership willing to consider meaningful changes?
- Are there plausible approaches worth exploring?
- Is the organization able to devote some time or resources to the work?
- Would addressing this issue complement (or conflict with) other major priorities?

Some problems will extend beyond the school's control. Compensation, staffing allocations, licensure rules, state requirements, or labor-market conditions may constrain what can be done locally. That does not automatically make them inappropriate priorities. The team may identify a meaningful part of the problem that can be changed while also documenting the larger constraint. It might also be appropriate for the district to consider strategies to advocate for broader changes, such as legislative initiatives, while also addressing school-level challenges.

Make the reasoning visible

Multiple criteria could be considered in establishing priorities. Discuss which criteria may be most important, and why. As information is shared outside of the design team about the prioritization results, be transparent about the factors that were considered.

Prioritization criteria may include:

Consider	Ask
IMPORTANCE	How much does this affect staff well-being or their ability to do their work?
REACH	Who is affected? Is the concern widespread, concentrated, or especially consequential for a particular group?
PERSISTENCE	Is this a recurring or sustained problem rather than a temporary disruption?
EQUITY	Are particular roles or groups disproportionately affected?
INFLUENCE	Is there a meaningful part of this problem that the school or district can change?
OPPORTUNITY	Is there a credible opportunity to make progress and learn?

Do not turn this into a mathematical scoring exercise. The criteria are prompts for discussion, not a formula that makes the decision for the team. Document why the selected issue rose to the top, and what will happen to important concerns that were not selected.

Use the Priority Selection Guide

If several concerns warrant attention, use the Priority Selection Guide to compare them systematically. The guide is intended to support discussion. Avoid simply assigning points and selecting the concern with the highest score. A less common concern may have serious consequences for a particular staff group, while a widespread concern may be difficult to address meaningfully at this time. Document the reasoning behind the decision, including why other important concerns are not being pursued now.

Close the loop with staff

Tell staff what the team chose, why it was selected, and what will happen next. Also acknowledge concerns that were not selected. "Not now" should not sound like "not important."

Action 2: Develop a clear problem statement

Once the team has selected a priority, describe the problem before trying to explain it. A useful problem statement is specific enough to investigate but does not already contain an assumed cause or preferred solution (U.S. Department of Education, 2026).

For example:

- **Too broad:** Staff are overwhelmed.
- **Assumes the cause:** Staff are overwhelmed because administrators schedule too many meetings.
- **Jumps to the solution:** Teachers need more planning periods.

A more useful framing might be: "Many teachers report that necessary planning, grading, and family communication routinely extend beyond the paid workday. Existing planning periods are frequently described as insufficient or unavailable for completing this work." The final statement does not yet explain **why** this is happening. That is intentional.

A useful problem statement generally identifies:

- **what** is happening;
- **who** is experiencing it;
- **where or when** it occurs, if relevant;
- **what evidence** suggests it is occurring; and
- **why** the issue matters.

Check your language

A good problem statement creates a question worth investigating. However, sometimes, problem statements can unintentionally embed blame.

Compare: "Paraprofessionals are not communicating effectively with teachers"

with: "Paraprofessionals and classroom teachers report that they often lack predictable opportunities to exchange information needed for student support."

The second statement leaves open multiple explanations: schedules, role expectations, staffing, communication systems, supervision, or something else.

> **If the problem statement tells you who is at fault or what intervention to implement, back up.**

Action 3: Investigate contributing factors

Now ask the question Phase 2 intentionally did not try to answer: **What appears to be producing or sustaining this problem?**

There is no single "best" way to explore underlying root causes or contributing factors. Possible approaches include Five Whys, fishbone diagrams, circle maps, force-field analysis, diagnostic trees, and other methods.

Contributing factors vs root cause

School workplaces are complex systems. A problem such as insufficient planning time may reflect staffing shortages, coverage practices, meeting expectations, student needs, documentation requirements, scheduling, initiative accumulation, or several of these at once. The question is therefore not: "What is the root cause?" Instead, it is: "What conditions appear to be contributing, which ones matter most, and which can we reasonably influence?"

Use the Contributing Factors Analysis

The Contributing Factors Analysis template helps the team move from a clearly described problem to plausible explanations. Start with what you learned in Phase 2. Identify possible contributing factors, then distinguish among what you know, what you think, and what you still need to learn.

The tool includes several optional ways to explore a problem. Use Five Whys when you want to follow a relatively clear causal pathway more deeply. Use a fishbone diagram when several interacting factors appear plausible. Compare exceptions or positive outliers when the problem occurs less often for certain groups, places, or times. You may use more than one approach, but do not use additional tools simply for the sake of completing them.

Whatever method you use, treat proposed contributing factors as hypotheses until they are supported by evidence.

Start with what you already learned

Return to Phase 2. What did staff say? What patterns appeared across surveys, listening sessions, observations, schedules, operational information, or other sources? When was the problem most visible? When was it less visible? Which staff experienced it differently? What already seemed to help?

These findings provide evidence for possible explanations. For example, suppose the priority is that teachers routinely complete planning work during evenings and weekends.

Phase 2 may already have shown that:

- scheduled planning periods exist;
- those periods are frequently used for coverage;
- teachers report substantial documentation requirements;
- newer teachers spend more time preparing lessons than experienced teachers; and
- one grade-level team reports much less after-hours planning because members share instructional materials.

Those patterns suggest several plausible contributing factors—and a useful strength to investigate.

Look at when the problem is better, too

There can be a tendency to focus only on failure. Instead, also ask: When does this problem occur less often? What is different then?

A school may discover that one team protects planning time more reliably, one supervisor resolves workload problems more quickly, one shift has better coverage, or one group has developed an effective workflow. Examining situations in which the problem is less severe can also reveal useful contributing conditions and existing strengths to build upon.

Tool Option: Five Whys

Five Whys is one of the simplest ways to move beyond an initial explanation. The team begins with a clearly defined problem and repeatedly asks what contributes to it. The number five is not a rule. You may need three questions or seven. The purpose is to keep the team from stopping at the first plausible explanation. Problems can have multiple causes and people who see different parts of a system may answer the questions differently (Institute for Healthcare Improvement, 2019; National Implementation Research Network, 2021).

For example:

Problem: Teachers frequently lose scheduled planning time.

Why?
Because they are frequently asked to cover classes.

Why is coverage needed so often?
Because many teacher absences are not filled by substitutes.

Why are absences frequently unfilled?
Because available substitutes often do not accept assignments at this school.

At this point, do not simply keep asking "why" mechanically. Investigate. Is acceptance actually lower at this school? What do substitute data show? What do substitutes say? Does the problem vary by day, assignment type, advance notice, travel distance, school climate, or pay?

The Five Whys has generated a **hypothesis**, not established a fact.

Treat every "why" as something to examine, not something the team has proven.

Examining contributing factors can easily turn assumptions into apparent facts. As the team identifies potential factors, they should ask important questions. What makes us think this is true? What evidence supports it? What evidence might challenge it? Who would know?

Five Whys is particularly useful when a team wants to follow one plausible contributing factor more deeply. For a more complex problem with several interacting causes, a broader mapping method may be more useful. A fishbone diagram is especially helpful because it discourages the team from settling immediately on one explanation. The Agency for Healthcare Research and Quality (AHRQ) promotes both Fishbone and Five Whys (Knox et al., 2015), and federal

education guidance identifies both as commonly used approaches in educational settings (U.S. Department of Education, 2026).

Tool option: Fishbone diagram

A fishbone—or cause-and-effect—diagram can help when the team needs to organize **several possible contributors**. Place the problem at the right side of the diagram. Then brainstorm factors that might contribute to it and group them into meaningful categories (Institute for Healthcare Improvement, 2019; U.S. Department of Education, 2026).

For a staff well-being problem, categories might include:

- workload and tasks;
- staffing and coverage;
- schedules and time;
- policies and procedures;
- roles and responsibilities;
- communication and coordination;
- leadership and supervision;
- student needs and support systems;
- tools, technology, or physical resources; and
- broader district or policy conditions.

These are not required categories. Use categories that fit the specific problem you are exploring.

As you explore possible contributing factors, do not confuse brainstorming with evidence. The first version of a Five Whys exploration or a Fishbone Diagram represents possibilities. Mark factors differently depending on what you know at this point:

- **Supported:** We have information suggesting this contributes.
- **Plausible but uncertain:** This may contribute, but we need more information.
- **Assumption:** We are currently inferring this without evidence.

This simple distinction can prevent a team from selecting a strategy based on the most confident voice in the room. Identifying your level of confidence in the statement will also help you identify statements that will require additional analysis of the evidence.

Avoid blame disguised as an underlying factor. Analysis can go badly when explanations stop at individuals. For instance:

- "Teachers are resistant to change."
- "Staff don't communicate."
- "Administrators don't care."
- "Parents are demanding."
- "Paraprofessionals need more training."

These statements may reflect genuine frustrations, but they are poor stopping points for analysis. Instead, ask what conditions shape the behavior. If staff are not using a new process, is the process clear? Do they have time? Does it fit the work? Do they believe it helps? Are multiple systems competing? Is training adequate? Do supervisors reinforce it consistently?

Watch out for contributing factors focused on training.

"Staff need more training" appears frequently in improvement plans. Sometimes it is correct. But first ask whether people lack knowledge or skill. If staff already know what to do but lack time, staffing, authority, materials, coordination, or organizational support, more training is unlikely to solve the problem.

Follow differences, not just averages

Contributing factors may not be the same for everyone. Teachers may lose planning time because of coverage. Counselors may lose documentation time because of crisis response. Paraprofessionals may have almost no non-student-facing time built into their schedules. Office staff may experience constant interruptions. Transportation or food-service employees may work within rigid time windows that create time pressure. Do not force different experiences into one causal story merely because they share a label such as "not enough time."

When you use the Five Whys or a Fishbone Diagram, you may want to start with disaggregated information. Creating versions for different groups may help elucidate the differences in what is contributing to stress for staff.

Know when you know enough

Contributing factor analysis can become endless. The team does not need to identify every condition that has ever contributed to the problem. The purpose is to reach a level of understanding that supports a responsible decision.

You probably know enough when the team can:

- describe several important contributing factors;
- explain what information supports those explanations;
- identify meaningful differences across staff groups or contexts;
- distinguish factors the organization can influence from those it cannot;
- identify strengths or protective conditions worth preserving; and
- identify at least one plausible factor that, if changed, could meaningfully improve the problem.

If a critical explanation remains uncertain, collect targeted information rather than reopening broad data collection.

Action 4: Select a target for change and identify promising strategies

Contributing factor analysis should narrow the team's focus, not produce a longer list of problems. Review the contributing factors and ask: Which condition, if changed, is most likely to make a meaningful difference? That condition becomes the team's target for change.

The Target for Change Worksheet creates a pause between understanding the problem and selecting a solution. Identify a condition that appears important, is reasonably open to influence, and could plausibly improve the priority concern if changed.

Remember that a target is not a strategy. "Planning time is frequently lost to routine coverage" describes a condition that might become a target. "Hire building-based substitutes" is one possible strategy for changing it. Keeping those separate allows the team to consider more than one solution before committing to an intervention (U.S. Department of Education, 2026).

Suppose the original concern was: Teachers do not have enough planning time. After deeper investigation, the team learns that teachers technically receive adequate scheduled planning time, but internal coverage consumes a substantial portion of it because substitute assignments regularly go unfilled. The target is no longer simply "planning time." A more useful target might be: "Reduce the amount of scheduled planning time lost to routine coverage." That target creates a much clearer path toward potential strategies.

Choose a target before choosing a strategy

> **A target describes what needs to change. A strategy describes how you will try to change it. Keeping those separate matters.**

CONCERN	CONTRIBUTING FACTOR	TARGET FOR CHANGE	POSSIBLE STRATEGY
Planning work routinely extends beyond the paid day	Planning periods frequently lost to coverage	Reduce loss of protected planning time	Strengthen substitute coverage; redesign coverage system
Staff report excessive paperwork	Same information entered into several systems	Reduce duplicative documentation	Integrate forms; eliminate duplicate entry
Staff feel unsupported when student behavior escalates	Response process is unclear and help is inconsistent	Improve timely access to behavioral support	Clarify response protocol; create reliable escalation support
New staff report weak administrative support	Supervisor contact is mostly evaluative or crisis-driven	Increase routine developmental supervision	Schedule structured supervision/check-ins; provide supervisor coaching

The target should be specific enough to guide strategy selection but broad enough to allow more than one possible solution.

Consider influence—but do not confuse influence with ease

Some contributing factors are easier to change than others. A team may have direct control over meeting structures, documentation processes, or internal communication expectations. Other factors may require district decisions, funding, contract changes, or state policy.

One useful exercise is to sort contributing factors into three groups:

WE CAN CHANGE THIS DIRECTLY	WE CAN INFLUENCE THIS, BUT NEED OTHERS	WE CURRENTLY HAVE LITTLE CONTROL OVER THIS

Do not automatically select the easiest item in the first category. Instead ask which factor has a credible connection to the problem and enough potential impact to justify attention. Consider both the likely impact of a cause and the extent to which staff can influence it when deciding where to focus (Minnesota Department of Education [MDE], 2025).

Use Part 2 to investigate possible strategies

Only now should the team begin looking closely at solutions. Part 2 of this toolkit is organized around workplace factors that commonly shape staff well-being. Use the contributing factors identified in this phase to decide where to look. Do not treat Part 2 as a menu from which the team selects the most appealing intervention. Follow the contributing factor to the strategy.

Use the Strategy Evidence & Fit Guide

Once the team has selected a target for change, use Part 2 and other credible sources to identify a small number of plausible strategies. Then use the Strategy Evidence & Fit Guide to compare them. Do not ask only, "Does this strategy have evidence?" A broader look is more helpful.

Research evidence is only one input. Staff experience, local information, feasibility, equity, resources, and implementation demands also matter. The purpose is not to identify a universally "best" strategy. It is to select an approach with a strong enough rationale and fit to justify testing.

Consider evidence and fit together

For each promising strategy, ask:

- Does it address the contributing factor we identified?
- What evidence supports the strategy—or at least the condition it is intended to change?
- Who was represented in that evidence?
- Does it fit our staff, setting, resources, schedule, policies, and other constraints?
- Who might benefit? Who might experience new burdens?
- What would need to be true for this strategy to work here?

A strategy with strong research support can still be a poor fit. A promising but less-studied strategy may be reasonable to test when it directly addresses a well-supported local contributing factor. This is why the toolkit uses an **evidence-informed** rather than simply an evidence-based approach.

Narrow the options

Do not carry ten strategies into Phase 4. The goal is to identify one strategy—or a small, coherent set of connected changes—that is promising enough to test.

A useful strategy should have:

- a clear connection to the target for change;
- a credible rationale or relevant evidence;
- reasonable fit with the setting;
- acceptable burden and resource requirements;
- no unacceptable equity consequences; and
- enough organizational support to permit a meaningful pilot.

If no option meets those conditions, do not force a decision. Reconsider the target, gather a small amount of additional information, or return to an earlier step.

Before committing to a strategy, complete this sentence: "For this strategy to improve the problem we identified, we are assuming that…". Those assumptions will become important in Phase 4, when the team decides what to test and what information to collect.

Phase 3 review

Before moving into Phase 4, consider:

- Can we explain why this issue was prioritized?
- Have we described the problem without assuming its cause or solution?
- Have we looked beneath the initial concern to identify contributing factors?
- Have we tested important explanations against what staff and other information actually tell us?
- Have we considered differences across roles, settings, schedules, and groups?
- Have we identified strengths or helpful conditions that should be protected?
- Have we distinguished factors we can change, influence, and currently cannot control?
- Can we name a specific target for change?
- Does the proposed strategy directly address that target?
- Have we considered evidence, feasibility, equity, and burden?
- Can we explain what we are assuming—and therefore what we need to learn in a pilot?
- Can staff see how their input influenced the priority, target, and proposed response?

Equity Check

Who is most affected by the priority? Did their experiences shape the contributing factor analysis and strategy selection? Could the proposed strategy help one staff group while shifting workload, inconvenience, risk, or responsibility to another? Whose perspective would help the team see an unintended consequence before the strategy is tested?

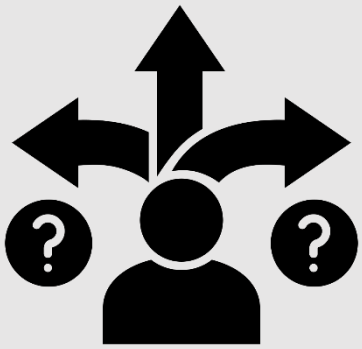
Burden Check

How much additional work would the proposed strategy create? Who would do that work? Is new work being added without something else being reduced? Could the strategy intended to improve staff well-being itself become another initiative staff must absorb?

Examples

Check in with the examples in the back of the toolkit to see what Oak Ridge Elementary School, Riverview Middle School, North Valley K-8 School, and Cedar Grove School District did in Phase 3. Read about the steps they took to prioritize issues, examine contributing factors, select targets, and choose strategies to pilot.

Decision Gate: Are we ready to pilot?



MOVE FORWARD

The team can explain the problem, the major contributing factors, the target for change, and why the selected strategy is a reasonable response. Important assumptions have been identified and can be tested in Phase 4.

MOVE FORWARD WHILE ADDRESSING GAPS

Some uncertainty remains, but the team has enough information to begin a small, low-risk pilot while gathering targeted information.

PAUSE, RETURN, OR CONTINUE LEARNING

The team is still relying heavily on assumptions; the strategy does not clearly address the identified contributing factors; important staff perspectives are missing; or the proposed change creates substantial unresolved feasibility, equity, or burden concerns.

Tools, Worksheets & Supplemental Resources

Before moving on to Phase 4, Update your Staff Well-Being Plan. For Phase 3, there are sections that can help you document what was selected as a priority and why, an updated problem statement, the analysis of contributing factors and strengths, and the target for change. The Plan also includes a place to describe the strategy selected for pilot testing in Phase 4, along with other alternatives that had been considered.

Learn More

These resources provide practical tools for prioritization. Several refer to root cause analysis. The guidance in these documents still applies, though the toolkit took a broader "contributing factors" analysis approach.

U.S. Department of Education — Approaches to root cause analysis - Provides an education-specific overview of root-cause analysis and several methods, including Five Whys, fishbone diagrams, circle maps, force-field analysis, and other approaches. It is particularly useful for choosing a method that fits the complexity of the problem.

U.S. Department of Education — Root cause analysis in action - This resource illustrates how elementary, middle, and high schools actually used problem statements, Five Whys, and fishbone analysis during school-improvement work. This is especially useful for teams that understand the tools conceptually but want to see what the process looks like in practice.

Institute for Healthcare Improvement — 5 Whys: Finding the root cause - This document provides more information about the Five Whys approach, with guidance for reminding teams that there may be multiple causal pathways and that different people may see different parts of the system.

Agency for Healthcare Research and Quality — Using root cause analysis to improve quality and performance - This resource provides practical guidance on Five Whys, fishbone diagrams, and other root-cause approaches within a continuous-improvement process.

National Implementation Research Network — Root cause analysis resources - The Network provides a number of resources to support conducting Five Whys and related tools and explicitly emphasizes beginning with disaggregated information because contributing factors may differ across populations and communities.

PHASE 4: Pilot test strategy & assess success

CENTRAL QUESTION

What happens when we try the strategy, what do we learn, and what should we change before broader implementation?

By the end of Phase 3, the team has moved from a broad staff concern to a much more specific theory about what might help. You have identified a priority, investigated contributing factors, and selected a target for change. You are entering Phase 4 with a promising strategy or small set of connected changes that appears worth trying.

But a promising strategy is still a hypothesis.

Research evidence may suggest that an approach has worked elsewhere. Staff may believe it addresses the identified problem. The design team may have developed a strong rationale. None of those things guarantees that the strategy will work as expected in your school, with your staff, under your particular conditions.



Phase 4 creates an opportunity to learn before committing to full-scale implementation.

Human-centered design emphasizes making ideas tangible, testing them with the people who will experience them, and using what is learned to refine the design. Similarly, improvement approaches such as Plan-Do-Study-Act (PDSA) recommend beginning with small tests, observing what happens under real conditions, and modifying the approach as needed before expanding it.

The goal of a pilot is not to demonstrate that the strategy was a good idea. The goal is to find out. A pilot is a structured opportunity to learn—not a smaller version of full implementation.

During this phase, your school or district will:

1

CLARIFY WHAT YOU NEED TO LEARN

Identify the most important questions the pilot should answer. Be explicit about what you expect the strategy to improve, how you think it will help, and which assumptions you most need to test.

2

DESIGN A MANAGEABLE PILOT

Plan a small feasible test of the strategy. Decide what will be tested, who will participate, where and when it will happen, who will be responsible for key activities, and what supports are needed.

3

DECIDE WHAT INFORMATION WILL SHOW IT IS HELPING

Identify the information you will collect to understand both how the pilot is working and whether it appears to be helping. Choose a small set of useful measures that inform decisions without creating unnecessary burden.

4

CONDUCT THE PILOT AND LEARN FROM WHAT HAPPENS

Put the strategy into practice and pay attention to what happens along the way. Track implementation, gather feedback, notice unexpected effects, and make reasonable adjustments when needed.

5

DECIDE WHAT TO KEEP, CHANGE, TEST AGAIN, OR STOP

Bring together what you learned from the pilot. Decide which parts should be continued, adapted, tested again, or discontinued. Document what you learned so it can inform the next step.

By the end of Phase 4, the team should be able to explain:

- what strategy was tested and why;
- what assumptions the pilot was designed to examine;
- who participated and under what conditions;
- whether the strategy was implemented as intended;
- what staff experienced;
- whether the target condition changed in the expected direction;
- whether there were important differences across staff groups or settings;
- what unexpected benefits, problems, burdens, or consequences occurred;
- what adaptations were made or are needed; and
- whether the strategy is ready for broader implementation, requires another test, or should be reconsidered.

Tools, Worksheets & Supplemental Resources

Four tools support Phase 4. The Assumptions & Learning Questions Tool helps the team identify what it most needs to learn before designing the pilot. The Pilot Plan specifies what will be tested, with whom, where, when, and under what conditions. The Pilot Data Plan identifies a small number of measures that can show whether the strategy was used, whether it helped, and whether it created unintended effects. Finally, the Pilot Learning & Decision Record helps the team compare what it expected with what actually happened and decide what to do next.

Action 1: Clarify what you need to learn

Before deciding how large the pilot should be or what data to collect, return to the reasoning developed in Phase 3. You selected a strategy because you believe it will change something. Make that reasoning explicit.

For example: If we make scheduled planning time more reliably available, then teachers will be able to complete more essential planning work during the paid workday, reducing the amount displaced to evenings and weekends.

That statement contains several assumptions. Perhaps protecting planning periods will actually make them more usable. Perhaps staff will use the recovered time for the work currently spilling

outside the school day. Perhaps reducing one source of interruption will make a meaningful difference even though other workload demands remain.

Those assumptions are exactly what the pilot should help the team examine. PDSA guidance similarly recommends that teams specify the questions a test is intended to answer and make predictions about what they expect to happen before conducting the test. Comparing those predictions with actual results makes the test a learning process rather than simply an activity.

Be explicit about the assumptions connecting your selected strategy to the change you expect. Return to the Strategy Evidence & Fit Guide completed in Phase 3. As your team considers the selected strategy, ask what has to be true for that strategy to work in your setting.

Possible assumptions might include:

- staff will understand the new process;
- staff will actually use it;
- supervisors will respond consistently;
- the strategy will reduce rather than redistribute work;
- needed resources will be available;
- the strategy will be feasible during high-demand periods;
- the people responsible for implementing it will have enough time;
- staff will experience the change as useful rather than burdensome; or
- changing the target condition will actually improve the staff experience that prompted the work.

Test the riskiest assumptions first

Not every assumption deserves its own measure. Focus on the assumptions that are important and uncertain. If a strategy depends on something you are not confident will happen, learn about that before investing heavily in implementation. IDEO's human-centered-design guidance similarly recommends identifying the critical elements and questions that need to be tested rather than trying to prototype every aspect of a fully developed solution at once.

Use the Assumptions & Learning Questions Tool

The Assumptions & Learning Questions Tool helps the team translate the strategy into a small number of questions the pilot should answer.

A team might need to learn:

- Can staff actually use the strategy as designed?
- Does it work under ordinary workplace conditions?
- Does it change the workplace factor we intended to change?
- Do staff experience that change as helpful?
- Who benefits—and who does not?
- Does it create new work, delays, confusion, or other unintended consequences?

A pilot does not need to answer every question about the strategy. It needs to answer enough to determine what the team should do next.

Action 2: Design a manageable pilot

A useful way to learn about a strategy is often to begin smaller than you eventually hope to implement it. A pilot might involve one team, one grade level, one building, one staff role, one type of meeting, one process, one portion of the day, or a short period of time.

The appropriate scale depends on the strategy. The Institute for Healthcare Improvement recommends beginning tests of change on as small a scale as practical and expanding as confidence grows. The Agency for Healthcare Research & Quality (AHRQ) similarly describes small-scale tests as a way to refine changes before broader implementation.

Small does not mean meaningless. The pilot needs to be large enough and realistic enough to answer the team's learning questions. Testing a new coverage process on a day when the school has no absences will teach very little. Testing a student-support protocol only with the staff who designed it may make the process appear easier to use than it will be for others.

> **As you design the pilot, ask where you can test the strategy under realistic conditions without exposing the whole organization to an unproven change.**

Decide what part of the strategy needs testing

You may not need to pilot the entire strategy at once. Suppose the team wants to strengthen professional support for new employees through a combination of mentoring, scheduled supervisor check-ins, and clearer pathways to specialized consultation. The first pilot might test only the support pathway. Can employees tell what type of help they need? Do they know where to go? Can they actually reach someone who can help? Does the response meet the need? Learning from that test may change how mentoring or supervision is eventually designed.

Make the pilot as simple as possible—but as real as necessary.

Human-centered design treats prototypes as tools for answering specific questions, not miniature finished products. Simple early versions can focus attention on the part of an idea that most needs testing.

Decide who should participate

Include people who can help the team learn—not only people most likely to make the strategy succeed.

Consider:

- staff directly affected by the change;
- people responsible for carrying it out;
- different roles or schedules;
- staff who may encounter different conditions;
- people who were less represented earlier in the process; and
- anyone whose work may be unintentionally affected.

Participation should still be proportionate to the decision. Do not turn a small pilot into another major staff initiative.

Decide how long to test

Longer is not automatically better. The pilot needs enough time to encounter the conditions that matter. A new meeting process might be tested over three meetings. A coverage procedure might need several weeks because absences vary. A supervision approach may require enough time for several meaningful interactions. In determining the appropriate length for the pilot test, consider what you would need to experience before reasonably judging whether this approach is workable.

Use the Pilot Plan

The Pilot Plan documents what will be tested, where, with whom, for how long, what support is needed, and what conditions the team wants to encounter. Keep the plan short enough that the people involved can actually use it.

Action 3: Decide what information will show whether it is helping

A pilot should generate information that helps the team decide what to do next. That does not mean conducting a full research study. Start with the learning questions from Action 1 and identify the smallest useful set of information needed to answer them.

Measure more than whether people liked it

Staff experience matters, but satisfaction alone does not tell you whether a strategy worked. Suppose a school pilots a process intended to protect planning periods. Staff may like the idea. But the team also needs to know:

- Did fewer planning periods get interrupted?
- Did the interruptions simply move somewhere else?
- Did teachers complete more essential work during scheduled time?
- Did coverage responsibilities shift to another staff group?

Did we actually do what we intended?

These are implementation or process measures. Examples include:

- percentage of eligible staff who used a new support pathway;
- number of planning periods protected as intended;
- percentage of requests following the new response process;
- number of supervisors completing planned check-ins; or
- number of proposed requirements receiving a workload review.

If the strategy was not implemented as intended, poor outcomes do not necessarily mean the strategy itself was ineffective.

Did the target condition change?

Return to the target identified in Phase 3. If the target was reducing loss of planning time, measure usable planning time. If it was improving timely access to student support, examine response reliability or wait time. If it was reducing duplicative workload, examine whether targeted work actually decreased. Keep the measure close to the condition you intended to change.

Did staff experience a meaningful difference?

Ask the people affected. This might involve a very short pulse survey, brief interviews, a few reflection questions at an existing meeting, or another low-burden method.

Questions might include:

- What changed for you?
- What helped?
- What remained difficult?
- What surprised you?
- What should we change before trying this more broadly?
- What else changed?

Improvement methods often use balancing measures to identify whether solving one problem created another. The Institute for Healthcare Improvement (IHI) distinguishes among outcome,

process, and balancing measures to help teams understand both intended improvements and possible unintended consequences.

For staff well-being work, this is especially important. A strategy that protects teacher planning time by repeatedly assigning paraprofessionals to additional coverage may improve one measure while worsening working conditions for another group. A streamlined documentation process might save time but omit information someone else needs. A new student-support pathway might improve response time but overwhelm the small group providing that response.

Burden Check

Do not ask only, "Did this reduce burden?" Ask, "Whose burden decreased, whose increased, and where did the work go?" Look for differences. Ask whether the strategy worked differently by role, building, schedule, experience level, or other meaningful context. The goal is not to conduct subgroup analysis when numbers are too small to support it. It is to notice when a strategy appears useful under some conditions but not others.

Use the Pilot Data Plan

The Pilot Data Plan helps the team connect each learning question with a small number of useful measures and information sources. If a proposed measure will not help answer a learning question or make a decision, reconsider whether it is worth collecting.

Action 4: Conduct the pilot and learn from what happens

Once the pilot begins, pay attention to what actually happens—not just whether the plan is followed.

PDSA provides a simple structure:

PLAN	What are we trying? What do we expect to happen? What will we observe?
DO	Try it. Document what happens, including problems and unexpected events.
STUDY	Compare what happened with what you expected. What did you learn?
ACT	Decide what to keep, modify, test again, or stop.

PDSA is intended to be iterative. One test frequently leads to another as teams modify the change and test it under different conditions.

Do not wait until the end to notice problems

Change or stop the pilot if it creates a serious problem, unnecessary burden, inequity, or safety concern. A pilot is not a commitment to finish an intervention exactly as planned.

Similarly, you may need to stop to fix design problems, such as confusing forms, unclear communication pathways, or unrealistic timing. In these situations, fixing the problem may be more useful than continuing for six weeks merely to document that it does not work. Document important adaptations so that the team can distinguish the strategy originally proposed from the version that was actually tested.

Pay attention to surprising results

Unexpected findings are often the most useful part of a pilot. Perhaps the strategy works, but for a different reason than expected. Perhaps staff value one component but ignore another. Perhaps it works well during ordinary weeks but breaks down during high-demand periods. Perhaps the primary benefit appears for a staff group the team did not originally expect. Treat these findings as learning rather than deviations from the plan. PDSA guidance explicitly treats unsuccessful tests as legitimate sources of learning and recommends ending a test when evidence suggests that the change is not producing improvement.

> **A pilot that changes your understanding of the problem has succeeded at learning—even if the strategy itself does not succeed.**

Keep staff involved in interpretation

Follow the human-centered-design principle of designing with, rather than merely for, the people affected by a change. Do not let the design team interpret pilot findings entirely on behalf of participants.

Ask the people who experienced the strategy:

- Does this match what happened?
- What are we misunderstanding?
- Why do you think the strategy worked differently in these situations?
- What should we keep?
- What should we change?
- What would make this workable over time?

Action 5: Decide what to keep, change, test again, or stop

At the end of the pilot, resist the temptation to reduce the decision to "Did it work?" A more useful question is: What did we learn, and what does that learning suggest we should do next? Return to the predictions and assumptions identified before the pilot. Compare expected and actual results.

For each important assumption, ask:

- What did we expect?
- What actually happened?
- What information supports that conclusion?
- Did experiences differ across people or conditions?
- What surprised us?

Consider several possible decisions. The team may decide to:

KEEP	The strategy or component appears useful as designed
ADAPT	The basic idea appears promising, but something needs to change
TEST AGAIN	Important uncertainty remains, or the strategy needs to be tested under different conditions
EXPAND	Results are promising enough to try with more people, for longer, or under more varied conditions.
STOP	The strategy does not appear useful enough, creates unacceptable problems, or no longer fits what the team understands about the problem.
REVISIT	The pilot suggests that the team's earlier explanation of the problem may have been incomplete or incorrect, and either the target or contributing factors may need to be reviewed and updated.

That last option is important.

If a well-designed strategy changes the target condition but the original staff concern does not improve, the team may need to reconsider its theory. For example, a school might successfully reduce interruptions to planning time but find little reduction in evening work. That would not necessarily mean protecting planning time was a bad idea. It might indicate that loss of planning time was only one contributor to after-hours workload.

Returning to Phase 3 is not failure. It is exactly what an iterative improvement process is designed to permit.

Do not scale simply because people liked the pilot

Before moving into full implementation, ask whether the team has enough confidence that:

- the strategy can be carried out under realistic conditions;
- the target changed in the intended direction;
- staff experienced meaningful benefit;
- important burdens or unintended consequences are acceptable or addressable;
- the approach works across enough relevant conditions;

- the organization has the capacity to support it more broadly; and
- remaining uncertainty can reasonably be addressed during implementation.

Testing is not the same as implementation. Testing builds confidence and adapts a change to local conditions, while implementation makes the change part of routine work and requires the infrastructure necessary to support it. That distinction leads directly into Phase 5.

Phase 4 review

Before moving into Phase 5, consider:

- Did we clearly identify what we needed to learn?
- Did we make important assumptions explicit before the pilot?
- Was the pilot small enough to permit adaptation but realistic enough to teach us something useful?
- Did we include people whose experience could reveal problems with the strategy?
- Did we assess whether the strategy was actually used as intended?
- Did we examine whether the target condition changed?
- Did we ask staff whether the change made a meaningful difference?
- Did we look for unintended effects and movement of burden?
- Did we examine meaningful differences across roles or contexts?
- Did we compare what happened with what we predicted?
- Did we involve affected staff in interpreting the findings?
- Can we explain what we will keep, change, test again, or stop?
- Do we have enough confidence to consider broader implementation?

Equity Check

Who participated in the pilot, and whose experience was not tested? Did the strategy work similarly across staff groups and conditions? Who benefited most? Who benefited less? Did anyone acquire new work, inconvenience, risk, or responsibility as a result of the change? What should be changed before the strategy reaches more staff?

Burden Check

What work did the pilot itself create? What work did the strategy add, remove, simplify, or move? Would the burden look different at full scale? Did data collection require more staff effort than the information was worth? What can be simplified before the next test or broader implementation?

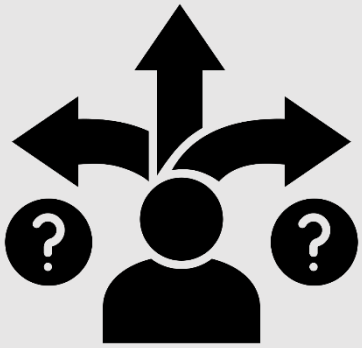
Tools, Worksheets & Supplemental Resources

Before moving on to Phase 5, update your Staff Well-Being Plan. Record what was tested, the assumptions and learning questions examined, what happened, important differences across staff or settings, unintended effects or movement of burden, adaptations made, and what the team decided to do next.

Examples

Check in with the examples in the back of the toolkit to see what Oak Ridge Elementary School, Riverview Middle School, North Valley K-8 School, and Cedar Grove School District did in Phase 4. Read about how they pilot tested their identified strategies, what they learned from the pilot, and how they decided to move forward.

Decision Gate: Are we ready for broader implementation?



MOVE FORWARD

The strategy has been tested under sufficiently realistic conditions. The team understands how it works, has evidence that it is helping, has addressed important unintended effects, and has enough confidence to develop a broader implementation plan.

MOVE FORWARD WHILE CONTINUING TO LEARN

The strategy appears promising and remaining uncertainties can reasonably be monitored and addressed during broader implementation.

TEST AGAIN

The strategy remains promising, but important questions, adaptations, populations or conditions still need testing.

RETURN TO PHASE 3

The pilot suggests that the strategy does not adequately address the target – or that the team's understanding of contributing factors needs reconsideration.

STOP

The strategy does not appear sufficiently useful, feasible, equitable, or sustainable to justify continued testing.

Learn More

The Institute for Healthcare Improvement (IHI) has a number of useful resources that could support your work in Phase 4.

Model for improvement: Testing changes - A very accessible introduction to using Plan-Do-Study-Act (PDSA) cycles to test changes on a small scale, learn from what happens, and refine them before broader implementation.

Establishing measures - This resource helps explains the distinction among outcome, process, and balancing measures, emphasizes quantitative and qualitative information, and distinguishes measurement for improvement from measurement for research.

PDSA worksheet - A concrete tool teams can use to plan and document individual tests of change. It prompts teams to plan the test, carry it out, study what happened, and determine what to modify next.

Model for improvement - This resource focuses on three central questions—What are we trying to accomplish? How will we know that a change is an improvement? What change can we make that will result in improvement?

PHASE 5: Develop & launch full implementation plan

CENTRAL QUESTION

How do we implement the change well, understand whether it is helping, and sustain what works?

A promising strategy is only the beginning.

By the end of Phase 4, your team should know considerably more than it did when the process began. You have identified an important staff well-being concern, investigated factors contributing to it, selected a target for change, developed a strategy, and tested that strategy under real conditions.

If the pilot suggests that the strategy is worth continuing, the next challenge is implementing itore broadly and reliably.

A good strategy is not enough.



A strategy can be well designed and still fail to improve staff well-being if people do not understand it, lack the time or resources to carry it out, encounter barriers that are never addressed, or gradually return to previous ways of working.

Implementation is also not simply a matter of persuading people to follow a plan. Sometimes people need information, training, or support. But sometimes the problem is structural: insufficient time, unclear authority, competing expectations, inadequate staffing, incompatible systems, or a strategy that does not fit the setting.

The goal of Phase 5 is to create the conditions that allow a useful strategy to work—and to keep learning whether it actually does.

During this phase, your team will:

1

DEFINE WHAT YOU ARE IMPLEMENTING

Clearly describe the strategy you are taking forward from the pilot. Identify its purpose, the essential elements that should remain consistent, and the parts that can be adapted to fit different staff, settings, or circumstances.

2

REASSESS CONTEXT, READINESS, BARRIERS, AND FACILITATORS

Take a fresh look at the conditions that could help or hinder implementation. Consider what has changed since you began, what you learned during the pilot, and whether different settings or staff groups may face different barriers or need different supports.

3

MATCH IMPLEMENTATION SUPPORTS TO WHAT PEOPLE NEED

Use what you know about barriers, facilitators, and staff needs to select practical supports for implementation. These might include communication, leadership support, training, coaching, protected time, tools, staffing, or changes to routines, policies, and procedures.

4

IMPLEMENT, MONITOR, LEARN, AND ADAPT

Put the strategy and its implementation supports into practice while continuing to learn. Monitor how implementation is going, whether the strategy is reaching and helping staff as intended, and what needs to be adapted as conditions and needs change.

5

SUSTAIN WHAT WORKS – AND STOP WHAT DOES NOT

Build effective strategies into the routines, resources, policies, and structures needed to support them over time. Continue monitoring whether they remain useful and feasible—and be willing to modify or stop strategies that are no longer helping.

By the end of Phase 5, the team should be able to explain what is being implemented and why; which elements need to remain consistent and which can be adapted; what conditions help or hinder implementation; which implementation supports are needed; whether the strategy is reaching staff and being used as intended; whether the target condition and staff experience are improving; what adaptations have been made and why; and what is needed to continue, expand, modify, replace, or stop the strategy.

Tools, Worksheets & Supplemental Resources

Five tools support this phase. The Core Components & Adaptation Guide clarifies the purpose and essential elements of the strategy, what can vary, and where guardrails are needed. The Implementation Context & Readiness Scan helps the team revisit readiness and examine conditions that may support or interfere with broader implementation. The Barrier-to-Support Planner connects specific barriers with implementation supports rather than defaulting to generic training or communication. The Implementation, Monitoring & Adaptation Plan combines responsibilities, rollout, monitoring, staff feedback, and adaptation in one working document. Finally, the Sustainment & Next-Decision Review helps the team decide what should be embedded, expanded, adapted, reduced, replaced, stopped, or deliberately de-implemented.

As in earlier phases, the tools should support thinking rather than create paperwork. Important findings and decisions should return to the Staff Well-Being Plan, which provides the continuous record of why the team is doing what it is doing.

The difference between a well-being strategy and an implementation strategy

It is useful to distinguish between what you are doing to address the staff well-being concern and what you are doing to help that change succeed. The well-being strategy is the change intended to address the workplace condition identified in earlier phases. For example:

- protecting planning time;
- changing how workload decisions are made;
- improving access to timely student-support assistance; or
- strengthening professional support.

Implementation strategies are the actions used to help people put that change into practice. They might include clarifying roles, changing workflows, providing training or coaching, developing job aids, adjusting schedules, protecting time, changing communication processes, providing data and feedback, or addressing barriers as they emerge.

The distinction matters because an implementation problem should not automatically be interpreted as evidence that the well-being strategy does not work. Conversely, repeatedly adding implementation supports will not rescue a strategy that is poorly matched to the problem. The team needs to learn about both.

Three conditions for successful implementation

Before working through the actions in this phase, keep three conditions in view. These are not additional steps. They are conditions that influence implementation throughout the process.

Leadership

Leadership support means more than approving the initiative or expressing enthusiasm for it. Leaders may need to protect time, allocate resources, clarify priorities, resolve competing expectations, remove barriers, make difficult decisions, and follow through. Leadership is especially important when implementation requires changing established routines or deciding what will receive less attention so that something else can receive more. Ask: What will leaders need to do—not just say—for this change to succeed?

Ownership and accountability

A plan can easily lose momentum when responsibility is diffuse. Designate people with "ownership" over carrying out the work. Ownership does not mean that one person carries the work. It means that responsibility for important functions is clear.

Clarify:

- Who is responsible for making key parts of the strategy happen?
- Who notices when implementation is not occurring as intended?
- Who has the authority to address problems?
- Who communicates with staff?

- Who reviews what is being learned and makes decisions about adaptation?

Capacity

Perhaps the most important implementation question is also one of the simplest: Can people actually do what the plan requires? Consider whether staff have the necessary time, people, skills, resources, systems, and authority.

Do not assume that a strategy is feasible simply because its individual tasks appear reasonable. Small demands can accumulate. A new process may also reduce burden for one group by shifting work to another. Throughout implementation, continue asking: What work are we adding, removing, or moving—and for whom?

These three conditions—leadership, ownership and accountability, and capacity—should be revisited as circumstances change.

Action 1: Define what you are implementing

Before expanding the strategy, make sure people can describe what is actually being implemented. This may sound obvious, but strategies often become less clear as they move from a small pilot to broader implementation. Different teams may interpret the strategy differently. Procedures developed during the pilot may be mistaken for essential elements. Alternatively, important features may disappear as people adapt the strategy to fit their setting. Use what you learned during Phase 4 to define the strategy more precisely.

Identify the core purpose

Start with the function the strategy is intended to serve.

Ask:

- What condition are we trying to change?
- How is this strategy expected to change it?
- What must remain true for the strategy to have a reasonable chance of producing that change?

For example, if a school is implementing protected planning time, the purpose is not simply to put planning periods on the schedule. The strategy needs to result in planning time that staff can actually use for its intended purpose.

Distinguish core elements from adaptable elements

Not every feature of a strategy needs to be implemented identically.

Identify:

- **Core purpose**: What is this strategy intended to accomplish?
- **Core elements.** What needs to remain consistent because it is central to how the strategy is expected to work?
- **Adaptable elements.** What can reasonably vary across teams, roles, schools, or circumstances?
- **Guardrails:** What should not happen, even if the strategy is adapted?

Implementation literature commonly distinguishes the essential components of an intervention from features that can be adapted to local context. This allows teams to maintain the intended function of a strategy while responding to differences in settings and populations.

For example, a professional-support strategy might require that staff have reliable access to someone with appropriate expertise. That function may be core. Whether the support occurs through mentoring, coaching, consultation, individual meetings, or another arrangement may be adaptable. Defining the strategy this way helps avoid two opposite mistakes: insisting on unnecessary uniformity or adapting so extensively that the strategy no longer serves its intended purpose.

Carry forward what you learned from the pilot

Phase 5 should not begin from the original strategy description. Begin from the strategy as revised through Phase 4. Document what changed during the pilot, what assumptions were supported or challenged, what conditions appeared necessary, and what should be preserved during broader implementation.

Start with the purpose, not the procedure

Suppose a school district wants newer employees to have reliable access to developmental support. The purpose is not necessarily to require every new employee to attend a 30-minute meeting with a principal each month. The purpose might be to ensure that newer employees have predictable opportunities to ask questions, receive useful feedback, address problems early, and connect with appropriate expertise.

A monthly principal meeting is one possible way to accomplish that purpose. It may work well for some staff and poorly for others. A paraprofessional, custodian, school counselor, technology specialist, or transportation employee may need different sources of professional support. Defining the function first gives the organization room to adapt the form without losing sight of what the strategy is supposed to accomplish.

Standardize the purpose before standardizing the procedure. Ask what must reliably happen, then determine how much flexibility different staff and settings need in making it happen.

Identify guardrails

Flexibility does not mean anything goes. Guardrails describe boundaries that protect the purpose of the strategy or prevent foreseeable harm. Guardrails are especially useful when a strategy could benefit one group by transferring burden to another.

If a strategy is intended to protect planning time, for example, a guardrail might state that routine staffing shortages should not simply shift coverage responsibilities to paraprofessionals or specialists. If a workload review is intended to reduce cumulative demands, the review itself should not become a lengthy new documentation requirement.

Distinguish the well-being strategy from its implementation supports

Once the strategy is clearly defined, identify the work that will be necessary to put it into practice.

WELL-BEING STRATEGY	POSSIBLE IMPLEMENTATION STRATEGIES
Protect usable planning time	Revise coverage procedures; clarify interruption expectations; orient staff and supervisors; monitor lost planning periods
Reduce accumulation of low-value work	Establish workload-review process; clarify who can discontinue requirements; prepare decision-makers; integrate review into existing planning
Improve timely access to student support	Clarify response pathway; define roles; prepare responders; create backup procedures; monitor demand and response
Improve access to professional support	Define support pathways; prepare supervisors/mentors; communicate available supports; address role-specific gaps

Keeping these two levels separate helps the team diagnose problems later. If protected planning time is not occurring reliably, the team may need to strengthen implementation rather than abandon the underlying strategy.

Use the Core Components & Adaptation Guide. Use this tool before broader rollout and revisit it whenever important adaptations are proposed.

Action 2: Reassess context, readiness, barriers, and facilitators

Readiness was important in Phase 1, but it was never intended to be checked off permanently. Readiness will play an important role in supporting implementation. The question in Phase 1 was whether the organization had enough readiness to begin the improvement process. The question is different now: **Are the conditions in place to implement this particular strategy more broadly?**

A small pilot may have depended on unusually motivated staff, close attention from the design team, temporary resources, or workarounds that cannot be sustained at scale. Leadership, staffing, budgets, schedules, competing initiatives, or other conditions may also have changed since the work began.

Implementation frameworks such as CFIR emphasize that implementation is affected by characteristics of the strategy, the people involved, the organizational setting, the broader environment, and the implementation process. These conditions can function as barriers or facilitators, and they can change over time.

Conduct an implementation context scan

You do not need to assess every possible implementation factor. Look systematically across several areas and identify the conditions most likely to matter.

IMPLEMENTATION FACTOR	QUESTIONS TO CONSIDER
THE STRATEGY	Is the strategy understandable and workable? Does it fit the problem? How much new effort does it require? Are the core and adaptable elements clear?
PEOPLE	Do the people expected to use or support the strategy understand it? Do they see its value? Do they have the knowledge, skills, confidence, and authority they need?
TEAM & RELATIONSHIPS	Does implementation require coordination across roles or departments? Are responsibilities and communication pathways clear? Are there relationships or power dynamics that could help or interfere?
LEADERSHIP	Do leaders understand what implementation requires of them? Are they willing and able to protect time, allocate resources, clarify priorities, remove barriers, reinforce expectations, and respond when implementation problems arise?
WORKFLOW & SYSTEMS	Does the strategy fit existing schedules, procedures, technology, communication systems, contracts, or policies? What needs to change so that people do not have to rely on workarounds?
RESOURCES & CAPACITY	Is there enough time, staffing, expertise, money, space, or other capacity to implement the strategy? What happened during the pilot that depended on temporary or unusually intensive support?
BROADER CONTEXT	Are district requirements, labor agreements, funding, policy, workforce conditions, or other external factors likely to help or constrain implementation?

The purpose of this scan is not to produce a comprehensive inventory. It is to identify the conditions that could meaningfully affect whether the strategy is adopted, reaches staff, is used

as intended, and can continue. Research on implementation similarly cautions that context operates at multiple levels and can create blind spots when teams focus too narrowly on individual behavior.

Look for facilitators, not only barriers

Some conditions are already helping. The pilot may have identified supervisors who are effective at supporting the change, existing meeting structures that make communication easy, teams that developed useful workarounds, or policies that already support the strategy. Ask how those strengths can be used intentionally during expansion.

Revisit leadership support

Leadership support should become concrete again at this stage. "Leadership supports the initiative" is less useful than knowing what leaders are prepared to do when schedules conflict, resources are needed, implementation varies across buildings, or staff identify an unintended consequence. Return to the commitments discussed in Phase 1. What does leadership support need to look like for this strategy, at this scale, now? Use the Implementation Context & Readiness Scan.

Action 3: Match implementation supports to what people need

Once important barriers and facilitators are identified, decide what support will actually address them. This is where implementation planning often becomes generic. Teams identify a change and automatically plan to "communicate it," "train staff," and "monitor progress." Those activities may be useful, but only when they address the conditions interfering with implementation.

Implementation research has developed extensive taxonomies of implementation strategies. At the same time, research cautions against assuming that every barrier has one obvious matching strategy; multiple barriers may interact, and a single barrier may require several complementary supports.

Begin with the barrier

Use this sequence:

- What is getting in the way?
- Why is it getting in the way?
- What could change that condition?

For example:

IF THE BARRIER IS…	A USEFUL SUPPORT MIGHT BE…
Staff do not understand the new process	Clear communication, examples, orientation, job aid
Staff understand it but do not know how to do it	Training, modeling, practice, coaching
Expectations differ across supervisors	Clarified expectations, supervisor preparation, feedback
Staff do not have time	Workflow or schedule change, removal of competing work, additional capacity
The strategy conflicts with existing procedures	Procedure/policy redesign
Staff cannot access needed expertise	Consultation, coaching, peer support, referral pathway
Leaders cannot see where implementation is breaking down	Brief monitoring and feedback system
A barrier is beyond the team's authority	Leadership action or escalation to the appropriate decision-maker
Staff do not see the strategy as useful	Revisit rationale, staff engagement, strategy fit and possibly the strategy itself

Training is therefore not the default answer to an implementation problem. If people know exactly what to do but cannot do it because they lack time, staffing, authority, or resources, additional training simply adds work.

NIRN's Active Implementation Frameworks make a similar distinction. Rather than relying on knowledge-building alone, they emphasize the importance of coordinated competency, organizational, and leadership drivers.

Use leadership as an implementation support

Leaders can support implementation by clarifying priorities, protecting time, providing resources, removing barriers, aligning policies and procedures, reinforcing expectations, and making decisions when tradeoffs arise. Some implementation barriers cannot reasonably be solved by the people experiencing them.

This is particularly important for staff well-being strategies. If the underlying problem involves workload, staffing, schedules, supervision, decision-making, or organizational expectations, successful implementation may require leaders to change organizational conditions rather than asking staff to become better at navigating them.

Keep staff involved

The people implementing and experiencing the strategy should continue to influence how it develops. They are often the first to recognize when a procedure is unclear, an adaptation is needed, a burden has shifted, or the strategy works differently under conditions the design team did not anticipate. Staff involvement should nevertheless remain proportionate. Do not create a standing expectation that staff repeatedly attend additional meetings or complete extensive surveys in order to sustain a well-being strategy.

Burden Check

What work are the implementation supports themselves creating? Can support be integrated into existing routines, and can something else be removed?

Use the Barrier-to-Support Planner. This tool can be helpful in documenting the anticipated barriers, strategies to reduce the barriers, and indicators that the barrier is being successfully managed.

Action 4: Implement, monitor, learn, and adapt

Broader implementation does not mean the learning process is over. Continue the cycle established during the pilot:



The difference is that the strategy is now operating across more people and more varied conditions. That makes monitoring especially important, because problems that were invisible during a small pilot may become apparent at scale.

Three questions should remain distinct throughout implementation:

Did we do it?

First, determine whether the strategy is actually being implemented. Do not equate attendance, distribution, or completion with meaningful implementation. A procedure can exist without functioning as intended.

Depending on the strategy, you might ask:

- Is it reaching the intended staff?
- Are the core elements occurring?
- Is implementation reasonably consistent?
- Are people able to access the strategy when needed?
- Are important elements being dropped or changed?
- Does implementation differ across teams, roles, schools, shifts, or other groups?

Did it help?

Next, return to the outcomes that motivated the work. Avoid relying solely on whether people like the strategy. Acceptability matters, but a well-liked strategy may not change the condition it was intended to address. Conversely, an effective organizational change may initially require adjustment. Use multiple forms of information when useful, but keep measurement proportional to the decision you need to make.

Consider:

- Is the target condition changing?
- Are staff experiencing the intended benefit?
- Is the strategy addressing the problem identified in earlier phases?

The updated CFIR Outcomes Addendum explicitly distinguishes implementation outcomes from reach and innovation-effectiveness outcomes. A strategy can therefore be implemented poorly and appear ineffective, or be implemented well without producing the desired result. Those situations call for different responses.

What else happened?

A strategy can produce effects that were not part of the original plan. Continue the balancing-measure logic from Phase 4. Did the strategy create an unexpected benefit? Did it add work? Did burden move from one staff group to another? Did a change that worked well in one building create problems in another? This is especially important when implementation expands to staff groups that were not represented in the pilot.

Ask:

- Did the change create unexpected benefits?
- Did it create new problems or additional work?
- Did burden move from one staff group to another?
- Who is benefiting most? Who is benefiting less?
- Are some staff experiencing the strategy differently?
- Did the strategy interact with other initiatives or working conditions in unexpected ways?

This is where your recurring Equity Check and Burden Check become particularly important. The toolkit establishes these as questions to revisit across the improvement process rather than topics to document once and leave behind.

Keep staff involved during implementation

Staff involvement should not end when a strategy has been selected. People experiencing the change can help the team understand:

- What is actually happening?
- What is working?
- What is getting in the way?

- What burden has been created?
- Who is experiencing the change differently?
- What needs to be adapted?

Opportunities to provide feedback are not the same as meaningful influence. Staff should be able to see how information reaches decision-makers and what happens as a result. Whenever possible, close the feedback loop. Let staff know what was changed, what was not changed, and the reasons behind these decisions.

Monitor only what helps you make decisions

Implementation monitoring might examine reach, use, fidelity to core elements, feasibility, acceptability, adaptations, or emerging sustainability. You do not need to measure all of these. Select information that will help the team recognize important implementation problems and decide what to do about them.

Continue monitoring the target condition and relevant staff experience as well. If the goal is more usable planning time, do not stop measuring usable planning time simply because the implementation plan is now focused on coverage procedures. If the goal is timely access to student support, continue examining whether staff actually receive timely support.

Adapt deliberately

Adaptation is expected. The question is not whether the strategy changes, but what changed, why it changed, and what happened as a result. When an adaptation occurs, identify what was changed:

ADAPTATION	QUESTIONS
The well-being strategy	Did we change the intervention itself?
The implementation support	Did we change how people are helped to use it?
The setting or system	Did we change workflow, staffing, policy, scheduling, technology, or another contextual condition?

Then document: What changed? Why? What were we trying to improve? What happened? Should we keep the change? This distinction helps prevent "adaptation" from becoming an

explanation for gradual drift away from the strategy's purpose. It also allows useful local innovations to become visible and potentially inform implementation elsewhere.

Adaptation is information. Repeatedly needing the same workaround may signal that the implementation plan—or the strategy itself—does not fit the system as well as expected.

Keep equity visible

As implementation expands, examine who is actually receiving the strategy and whether experiences differ across staff groups, settings, schedules, or supervisors.

A schoolwide average can again conceal meaningful differences. A strategy may be working well for classroom teachers but not specialists, or for daytime employees but not evening staff. Uneven reach or benefit may reflect a need to adapt implementation supports, modify the strategy, or address a structural barrier.

Use the Implementation, Monitoring & Adaptation Plan. This tool provides a structure for documenting the implementation plan, staff communication strategies, a monitoring plan, and a log of changes (or adaptations) made to the plan.

Action 5: Sustain what works—and stop what does not

Sustainment is sometimes treated as the final task after implementation: once the strategy works, figure out how to keep it going. In practice, sustainment should be considered throughout implementation because the conditions that make a short-term initiative possible are not always the conditions that make it part of normal organizational practice.

NIRN's Active Implementation Frameworks describe implementation as developing through stages while competency, organizational, and leadership supports and improvement cycles continue to operate. Sustainable implementation therefore involves more than maintaining enthusiasm for an initiative. It requires building the useful parts of the strategy into the systems that organize everyday work.

Ask what needs to become routine

Depending on the strategy, sustainment may require integration into:

- schedules and workflows;
- policies and procedures;
- job roles and responsibilities;
- staff orientation and onboarding;
- supervisor expectations;
- professional learning or coaching;
- budgets and resource allocation;
- data and feedback routines;
- communication structures; or
- leadership responsibilities.

For example, a school implementing some planning-time protections is unlikely to sustain this strategy if it depends on the current principal personally reminding people not to interrupt planning periods. Sustainment might require coverage procedures, scheduling practices, supervisor expectations, and monitoring that continue even when leadership changes.

Reduce dependence on exceptional people

Champions can be extremely valuable during implementation, but a strategy that depends indefinitely on one unusually committed person is vulnerable. Ask what knowledge, authority, relationships, or tasks currently reside with particular individuals and what needs to be transferred into roles, procedures, routines, or shared capacity.

Continue—but reduce—the monitoring burden

Monitoring usually becomes lighter as implementation stabilizes. The team may no longer need frequent feedback, but it should retain enough information to notice when the strategy begins to drift, becomes burdensome, stops reaching some staff, or no longer produces enough benefit to justify its cost. Decide what information needs to be reviewed periodically, who will review it, and what would trigger closer attention.

Sustain the function, not necessarily the original form

The context that produced the strategy will change. A sustainable approach can adapt while preserving its core purpose and guardrails. This is one reason the Core Components & Adaptation Guide from Action 1 remains useful after implementation. It helps future leaders understand not only what the organization currently does, but why it does it.

Decide what should happen next

Sustainment should not be an automatic decision to continue indefinitely. At regular intervals, consider whether the organization should:

- CONTINUE — Maintain the strategy largely as it is.
- EXPAND — Extend it to additional staff, settings, or situations.
- ADAPT — Retain the purpose but modify the strategy or implementation approach.
- REDUCE — Retain useful components while decreasing unnecessary activity or support.
- REPLACE — Use a different strategy that now appears more appropriate.
- STOP — Discontinue a strategy that is not providing sufficient benefit or creates unacceptable burden.

Sometimes the appropriate action is de-implementation: intentionally reducing or stopping an established practice that is ineffective, unnecessary, duplicative, harmful, or no longer worth the resources it requires. This is especially relevant to staff well-being because organizational burden often accumulates when schools become better at adding initiatives than ending them. A well-being process should therefore build the organization's capacity to stop things, too.

Use the Sustainment & Next-Decision Review to document key decisions about sustaining the strategy. The form can be used to document implementation factors that need to be in place to support the strategy, along with next steps to continue, adapt, or stop the strategy.

Phase 5 review

Before considering the initial five-phase cycle complete, ask whether the team can clearly explain both the well-being strategy and the implementation strategies supporting it. Core elements, adaptable elements, and guardrails should be sufficiently clear that someone new to the work could understand what needs to remain consistent and why.

Review whether the team reassessed readiness and implementation context at the scale now being attempted, rather than relying on conditions assessed in Phase 1. The most consequential barriers should have matched supports, responsibilities should be clear, and leadership should know what is expected when implementation encounters problems.

The team should also be able to answer "Did we do it?" and "Did it help?" with enough confidence to guide the next decision. Look for differences across staff groups and settings, identify burdens or unintended effects, and document important adaptations and what was learned from them.

Finally, determine whether the strategy is sufficiently integrated into normal organizational systems to continue without extraordinary attention. Sustainment should include an explicit future decision point rather than an assumption that a strategy, once implemented, should continue forever.

Equity Check

As implementation expanded, who actually received and benefited from the strategy? Examine whether access, implementation quality, benefit, or burden differed across roles, schedules, buildings, employment arrangements, or other meaningful circumstances.

If differences emerged, ask why. Did the strategy need adaptation? Were implementation supports uneven? Did some staff face structural barriers others did not? Did improving conditions for one group unintentionally move work or burden to another?

Equitable implementation does not necessarily mean identical implementation. Different staff may require different forms of support to achieve the same intended function.

Burden Check

Consider the burden created by both the well-being strategy and the implementation strategies supporting it. What new meetings, documentation, communication, training, monitoring, or coordination have been added? What work has been removed or simplified? Where has work shifted?

As implementation stabilizes, actively remove temporary supports that no longer add enough value. A staff well-being initiative should not leave behind an unnecessary implementation infrastructure that becomes another source of workload.

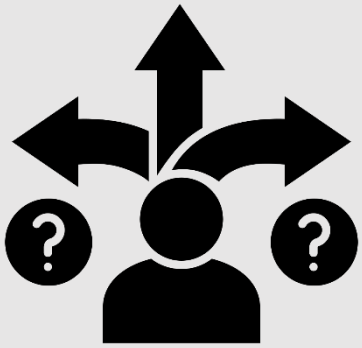
Tools, Worksheets & Supplemental Resources

Do one more update to your Staff Well-Being Plan. This will now provide you with a comprehensive summary of your staff well-being initiative, including documenting key decisions that were made and a plan for next steps.

Examples

Check in with the examples in the back of the toolkit to see how the initiatives worked out for Oak Ridge Elementary School, Riverview Middle School, North Valley K-8 School, and Cedar Grove School District. Read about how they moved from their pilot tests to a full implementation plan.

Decision Gate: What should happen next?



SUSTAIN/CONTINUE

The strategy is producing enough benefit, implementation is sufficiently reliable, important inequities or unintended effects have been addressed, and the necessary supports can reasonably be maintained.

EXPAND

There is a credible reason to extend the strategy to additional staff or settings, and the organization understand what will be required to support that expansion.

ADAPT AND CONTINUE LEARNING

The underlying strategy remains promising but changes are needed to improve fit, reach, implementation, equity, or sustainability.

RETURN TO AN EARLIER PHASE

New information changes the team's understanding of the problem, contributing factors, target, or strategy. Returning is part of the improvement process, not an indication that the process failed.

REDUCE, REPLACE, OR STOP

The strategy no longer provides enough benefit, creates unacceptable burden or unintended consequences, cannot reasonably be sustained, or a more appropriate approach has emerged.

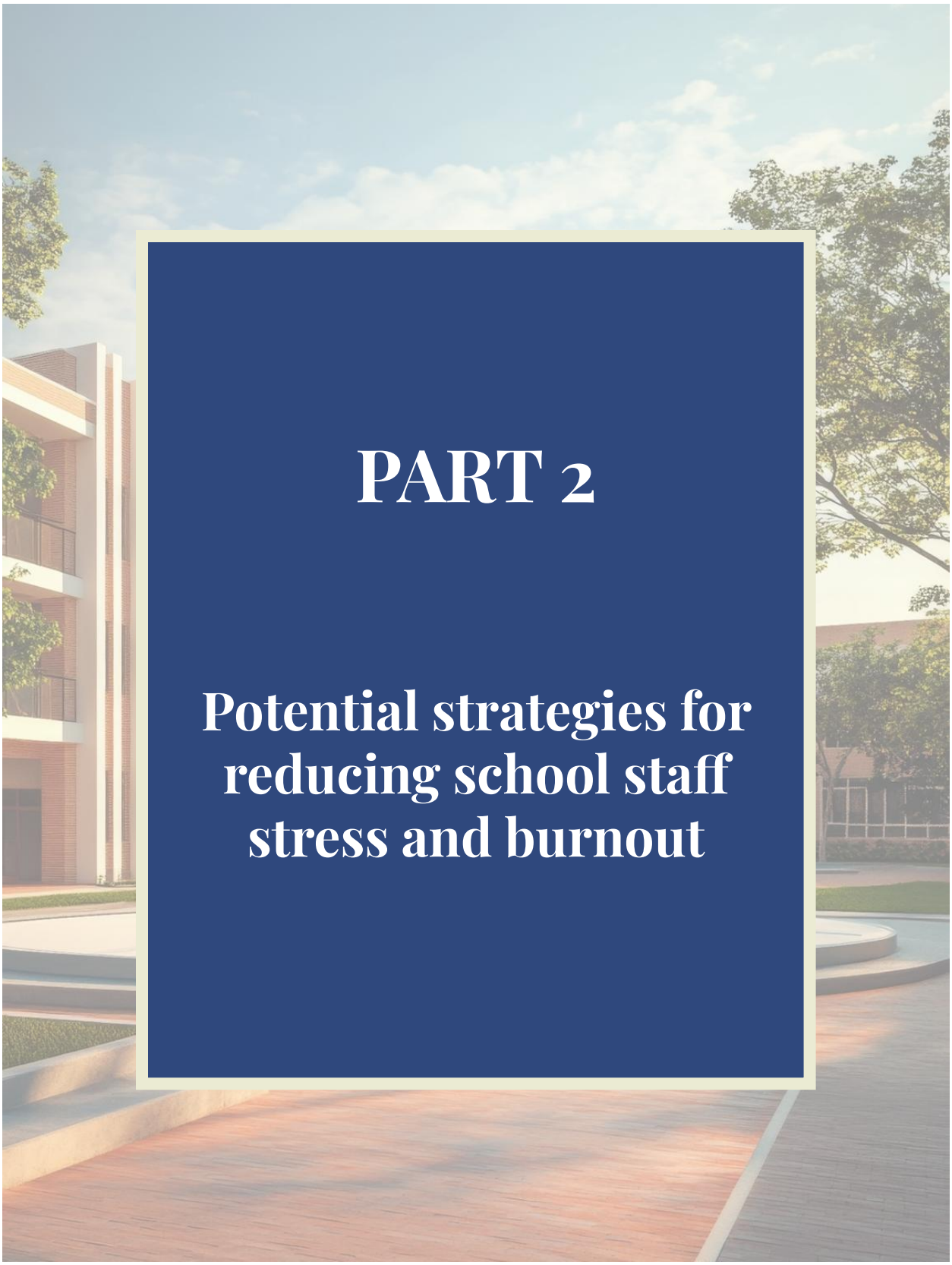
Learn More

Consolidated Framework for Implementation Research (CFIR) - Useful for identifying contextual barriers and facilitators and distinguishing implementation, reach, and effectiveness outcomes.

National Implementation Research Network — Active implementation frameworks overview - This is a nice overview of implementation stages, implementation teams, competency/ organization/leadership drivers, and improvement cycles.

Powell et al. (2015), Expert Recommendations for Implementing Change (ERIC) - This is a widely used compilation of implementation strategies.

CFIR Outcomes Addendum - This resource provides particularly useful guidance for the distinction among implementation, reach, and effectiveness outcomes.



PART 2

Potential strategies for reducing school staff stress and burnout

Introduction

Part 2 is meant to be entered where the problem points you. You do not need to read all nine sections before acting. Use the navigation guide below to find the workplace factor that best matches what your team is learning, and follow cross-links when more than one factor is involved.

Part 1 helps a team understand the problem and move through change. Part 2 is where the team can look more closely at the options: what might be changed, what schools have tried, what the research suggests, and where the evidence is still thin.

The evidence does not point to a single cause of staff stress or a single solution. A 2026 systematic review of 366 empirical studies of teacher well-being identified a wide range of job demands and resources, including workload, time pressure, student-related challenges, autonomy, collegial relationships, school-leader relationships, employment conditions, and physical and material resources (Moens et al., 2026). A separate 2025 scoping review of 46 teacher well-being interventions found that most tested interventions focused primarily on individual action, even though the broader well-being literature identifies important organizational conditions (Avola et al., 2025).

> **Research evidence can tell you what has worked elsewhere. It cannot, by itself, tell you what will work at your school.**

Use the research as one source of guidance, alongside staff experience, local information, context, feasibility, equity, and what you learn while trying a change. A strategy should have a credible rationale; at the same time, evidence from another setting cannot replace understanding what is happening in your own.

Three functions strategies can serve

Not all strategies do the same thing. There are several different functions that strategies to support staff well-being may play: changing or reducing demands; strengthening resources; and supporting coping, recovery, or treatment.



A comprehensive response may include more than one function. The important question is whether each strategy is being used for the purpose it can reasonably serve.

How to interpret the evidence

Part 2 summarizes the evidence for various strategies, but does not use a single standardized evidence score. A one-word label can obscure important differences. For each major strategy, ask three questions:

- **Does the target matter?** What evidence connects the workplace condition with staff well-being or related outcomes?
- **Has the strategy been tested?** What direct intervention evidence exists, and what outcomes changed?
- **What do we still not know?** Consider population, setting, durability, equity, implementation, mechanism, and unintended effects.

Keep outcomes distinct. Staff well-being, burnout, stress, job satisfaction, self-efficacy, intention to leave, actual turnover, implementation outcomes, and student outcomes are related but not interchangeable. A strategy that improves student outcomes or retention should not automatically be described as reducing staff burnout.

Who is represented in the evidence?

Published school staff well-being research disproportionately represents teachers. This toolkit uses teacher research when it is the best available evidence, but it does not treat "school staff" and "teachers" as interchangeable. Where studies include counselors, school mental-health providers, nurses, paraprofessionals, education support professionals, or broader whole-school staff, those populations are identified. Where evidence is sparse for transportation, food-service, custodial/facilities, clerical/office, security, technology, substitute, and other staff, the gap is named rather than allowing those employees to disappear from the toolkit.

A mixed-method study of education support professionals illustrates the breadth of the workforce often missed in teacher-centered research: clerical, custodial and maintenance, food-service, health and student services, paraeducator, security, skilled-trades, technical, and transportation roles were explicitly included (Naples et al., 2023). The absence of research should not be mistaken for evidence that these employees' experiences matter less.

Where should we look?

Once you have identified a priority concern related to staff well-being, ask what appears to be producing it. For example, "I do not have enough time" might reflect unnecessary or inefficient work (Section 1), necessary work that exceeds available capacity (Section 2), student needs that consume unplanned time (Section 6), initiative accumulation (Section 7), or scheduling and employment conditions (Section 8). Do not select a strategy until the contributing factor is clear enough to make a responsible next decision.

Part 2 is therefore not a menu of interventions. It is a set of evidence-informed pathways. The Strategy Evidence & Fit Guide at the end of Part 2 can be used after a team identifies several plausible options.

IF STAFF SAY…	START HERE
There is simply too much to do.	Sections 1-2: Workload; Staffing & Capacity
People do not feel supported by leaders.	Section 3: Leadership, Supervision & Organizational Support
Decisions are constantly made for staff.	Section 4: Voice, Autonomy & Influence
People lack expertise, developmental support, or collegial connection.	Section 5: Professional & Relational Support
Student needs are overwhelming staff or response systems break down.	Section 6: Systems That Help Staff Meet Student Needs
We are constantly rolling out new initiatives	Section 7: Organizational Change & Competing Demands
Pay, benefits, stability, facilities, equipment, or basic conditions are the problem.	Section 8: Employment, Material & Physical Conditions
Staff want help managing stress or accessing care.	Section 9: Individual Well-Being & Access to Care

The same concern can arise from different contributing factors. Follow the contributing factor—not simply the symptom—to the strategy most likely to address it.

Strategy 1: Make workload more manageable

Excessive workload and insufficient time are among the most consistently documented contributors to teacher stress and attrition. Research links heavy workload and work intensification with poorer well-being, lower job satisfaction, and greater intentions to leave. Importantly, workload is not simply a matter of the total number of hours worked. The number, complexity, intensity, timing, and organization of tasks also shape whether work feels manageable (Creagh et al., 2025; Morris et al., 2026).

Moens et al. (2026) identified workload in 109 studies; across those studies it was repeatedly associated with stress and burnout. The Organization for Economic Co-Operation and Development (OECD)'s 2024 Teaching and Learning International Survey (TALIS) likewise shows that administrative work, lesson preparation, marking, and other demands are commonly reported as sources of stress, although the relationship between time and stress is not purely a matter of hours (OECD, 2025). A 2026 review of 64 sources on teacher workload in England identified marking and feedback, lesson planning, data management, administrative responsibilities, external accountability, and constrained autonomy as recurring drivers (Morris et al., 2026).



Most of this research has focused on teachers and school leaders. Other school employees may experience workload differently. For example, a paraprofessional's workload problem might involve little uninterrupted time for required documentation, while a counselor's might involve balancing scheduled responsibilities with unpredictable crises. Office staff may experience frequent interruptions and competing requests, while custodial, food-service, transportation, technology, and other employees may face different combinations of workload, time pressure, staffing constraints, and physical demands.

Workload considerations

"Reduce workload" is not a strategy. First understand what is making work unmanageable.

A school might hear that staff "have too much to do," but that description can reflect very different conditions. Staff may spend time on work that no longer provides enough value to justify the burden. Necessary work may be unnecessarily cumbersome or fragmented. Staff may have a reasonable set of responsibilities, but insufficient protected time to complete them. Unclear roles, inefficient workflows, repeated interruptions, and expectations outside the paid workday may cause work to expand. These problems require different responses.

Before selecting a strategy, examine where the workload is coming from, when it becomes difficult to manage, which staff are most affected, and what happens to work that cannot be completed. A workload review can help identify paperwork, documentation, meetings, data entry, assessments, supervision responsibilities, communication expectations, coverage duties, and other activities that consume staff time.

> **The goal should be to remove, simplify, redesign, or more appropriately distribute work – not merely helping employees complete the same volume of work more quickly.**

Involve the people who actually do the work. They are often best positioned to identify processes that are duplicative, unnecessarily complicated, routinely interrupted, or less useful than intended.

Four ways to reduce workload

Different workload problems call for different responses. In practice, a school may need more than one approach.

Reduce or stop unnecessary work

Begin by asking whether everything staff are expected to do still needs to be done. Schools accumulate requirements over time. A report may have been created for a particular initiative and continued after the initiative changed. Multiple systems may collect essentially the same information. Meetings may continue because they have always occurred. Staff may prepare information that is rarely used to make a decision.

Look for work that is:

- duplicative;
- rarely used;
- no longer connected to a clear purpose;
- required more frequently or in greater detail than necessary; or
- continuing primarily because it has become routine.

Do not assume that a task is unnecessary simply because staff dislike it. Determine what purpose it serves, whether it is required, who uses the information or product, and what might happen if the task were eliminated or reduced.

Useful questions include:

- What would happen if we stopped doing this?
- Who uses the product of this work?
- Is the frequency or level of detail necessary?
- Are two or more processes accomplishing essentially the same thing?
- Could we discontinue something before adding something new?

This last question is especially important when schools introduce a new program, curriculum, assessment, policy, or initiative. Before implementation, ask: What new work will this create? Who will do it? When will they do it? What existing work can be reduced or discontinued to make room? When sufficient capacity does not exist, delaying, narrowing, or sequencing implementation may be more responsible than simply adding another priority. See Strategy 7: Organizational Change & Competing Demands.

Simplify or redesign necessary work

Some work cannot and should not be eliminated. But necessary work can still be unnecessarily difficult. Look for processes with repeated handoffs, duplicate entry, unclear approval steps, poorly matched technology, unnecessary documentation, excessive fragmentation, or requirements that consume substantially more time than their intended purpose appears to warrant.

Potential targets include:

- forms and documentation;
- data-entry processes;
- grading and feedback practices;
- meetings;
- assessment and progress-monitoring requirements;
- approval processes;
- communication systems; and
- recurring reports.

Grading and feedback provide one example. Feedback to students serves an important instructional purpose, but that does not mean every form of written feedback produces enough additional benefit to justify the time involved. Schools can examine existing expectations and consider alternatives such as more immediate verbal feedback, selective written feedback, student self- or peer-assessment when appropriate, shared tools or templates, and protected time for grading.

The goal is not to prescribe one "efficient" method. Work with staff to identify approaches that maintain the purpose and quality of the work while reducing unnecessary burden.

The same principle applies beyond classroom teachers. Documentation, scheduling, purchasing, referrals, student-support processes, transportation procedures, and other operational work may all be necessary while still being candidates for redesign.

Simplification should reduce work, not simply move it to someone else.

When redesigning a process, ask who gains time, who may acquire additional work, and whether the change creates new burdens for employees whose work is less visible.

Protect usable time

Reducing unnecessary work is only part of the solution. Employees also need sufficient paid time to complete the work that remains. For teachers, this includes lesson preparation, assessment and feedback, and collaboration with colleagues. Other employees similarly need time for documentation, case consultation, coordination, preparation, communication, and other responsibilities that cannot be completed while simultaneously providing direct services.

Research on teacher workload describes "time poverty" created by the interaction of high workload, work intensity, and insufficient time (Creagh et al., 2025). Recent workload research emphasizes that the complexity and organization of work matter alongside total working hours (Morris et al., 2026).

Scheduled time is not necessarily usable time. A teacher may technically have a planning period that is routinely lost to coverage. A counselor may have documentation time that disappears when crises arise. A paraprofessional may be expected to complete paperwork without ever being relieved of direct student responsibilities. A staff member may have preparation time on paper but experience constant interruptions.

When staff report inadequate time, examine what happens to the time that already exists.

Look for:

- routine coverage during preparation periods;
- meetings scheduled during planning time;
- frequent interruptions;
- supervision duties;
- crisis-response responsibilities;
- documentation expectations without designated documentation time;
- collaboration requirements without scheduled collaborative time; and
- work that routinely spills into evenings, weekends, vacations, or leave.

Possible changes include protecting preparation periods from routine reassignment, building common planning time into the paid schedule when collaboration is expected, providing designated documentation time, reserving portions of professional-development days for preparation, or redesigning schedules to create more reliable blocks of usable time.

Boundaries around work outside the paid day can also help. Schools can establish reasonable expectations for evening, weekend, vacation, and leave-time email and messaging. But communication boundaries will accomplish little if employees are still assigned more work than they can reasonably complete during available work time.

Measure usable time, not just scheduled time. If the schedule says staff have 45 minutes for planning but that time is routinely consumed by coverage, interruptions, or required meetings, the schedule alone will give you the wrong picture.

Clarify roles, workflows, and boundaries

Sometimes excessive workload is produced not by any single task but by the way tasks are organized. When responsibility is unclear, multiple people may do the same work, or everyone may assume someone else is doing it. Staff may repeatedly seek approvals, track down information, respond to the same requests through multiple systems, or coordinate work informally because no clear process exists.

Role ambiguity can also allow responsibilities to expand gradually. Staff take on additional duties because a need arises, but the new responsibility is never formally assigned, reviewed, or balanced against existing work.

Examine:

- who owns each responsibility;
- who contributes;
- where work is handed from one person to another;
- what information each person needs;
- what "done" means;
- how quickly responses are actually required;
- which responsibilities can be deferred when urgent needs arise; and
- which expectations extend beyond the paid workday.

Watch for workload shifting. A change that saves teachers time by adding substantial work for paraprofessionals, office staff, technology staff, or administrators has not necessarily reduced organizational workload. Examine the effect across roles before deciding that a strategy worked.

What schools have actually tried

A large school-based workload-reduction initiative in England provides a useful example of what intentional workload reduction can look like. Thirty-six schools used the Department for Education's School Workload Reduction Toolkit to identify sources of unnecessary teacher workload and design changes in areas including grading and feedback, lesson planning, monitoring, data recording, and communication.

Across the projects, teacher-designed interventions significantly reduced the amount of time teachers spent on targeted activities, and teacher well-being improved. The period of workload reduction was also associated with maintained or improved pupil outcomes (Churches, 2020).

The most useful lesson from the project is not that every school should adopt a particular grading, planning, or communication practice. Schools identified their own sources of workload, selected changes appropriate to their context, and examined what happened.

What schools can take from this: Start with work that staff identify as particularly burdensome. Determine what is producing the burden. Select one or two practices that could be stopped, simplified, redesigned, or better protected. Test the change on a manageable scale. Then examine not only whether it saves time, but also what happens to staff experience, work quality, other employees, and student needs.

Evidence note: This was a large school-based improvement project rather than a randomized controlled trial of a single intervention. Schools used different designs and tested different changes. The findings therefore provide promising evidence for locally designed workload-reduction efforts, but they do not establish that any particular strategy will work in every setting (Churches, 2020).

What does the evidence tell us?

There is strong evidence that workload is an important target for staff well-being efforts. Research consistently connects teacher workload and work intensity with stress, poorer well-being, job dissatisfaction, and work-life conflict. Reviews also demonstrate that workload involves more than hours worked; complexity, intensity, fragmentation, and time pressure matter (Creagh et al., 2025; Morris et al., 2026).

The evidence for particular solutions, however, is less developed. School-based workload-reduction initiatives demonstrate that targeted changes can reduce particular demands and improve staff experience. But the intervention literature is much smaller than the literature documenting the workload problem. Much of the available information consists of locally

designed projects, rather than rigorous comparative studies. Most research also focuses on teachers and school leaders.

For that reason, the strategies below are best understood as promising or emerging approaches with a strong rationale, rather than universally established solutions.

CORE STRATEGY	EVIDENCE CLASSIFI-CATION	WHAT THE EVIDENCE SUGGESTS	LIMITATIONS/ CAUTIONS
Reduce or stop unnecessary work	Promising / emerging	Workload and work intensity are strongly linked with poorer teacher well-being and career outcomes. School-based workload-reduction projects show that schools can identify and remove or reduce particular demands, including unnecessary grading, data collection, planning requirements, and communication practices (Creagh et al., 2025; Churches, 2020; Morris et al., 2026).	Direct intervention evidence is smaller than the evidence documenting workload as a problem. Removing one requirement may not reduce total workload if other work expands or the task is shifted to someone else. Evidence is predominantly teacher-focused.
Simplify or redesign necessary work	Promising / emerging	School-based projects suggest that redesigning grading and feedback, planning, data recording, monitoring, and communication can reduce time spent on targeted activities. Recent review evidence supports treating workload as an interconnected system rather than as isolated tasks (Churches, 2020; Morris et al., 2026).	There is no single redesign approach shown to work across settings. Efficiency should not come at the expense of work quality, student needs, or increased burden for another staff group.
Protect usable time	Promising / emerging	Research strongly supports insufficient time and time pressure as important components of teacher workload and work intensification. Protected time is therefore a credible organizational target, particularly when required work cannot be completed while staff	Evidence that insufficient time is a problem is stronger than direct evidence identifying the optimal amount or configuration of protected planning, preparation, collaboration, or documentation time. Needs

CORE STRATEGY	EVIDENCE CLASSIFI-CATION	WHAT THE EVIDENCE SUGGESTS	LIMITATIONS/ CAUTIONS
		are providing direct services (Creagh et al., 2025; Morris et al., 2026).	differ substantially across staff roles.
Clarify roles, workflows, and boundaries	Promising / emerging	Workload research indicates that the nature, complexity, organization, and intensity of work matter in addition to total hours. This provides a rationale for reducing fragmentation, unnecessary coordination, unclear responsibilities, and work that spills beyond expected hours (Creagh et al., 2025; Morris et al., 2026).	Direct school-based intervention research on specific approaches—such as role clarification, meeting-free periods, communication norms, or after-hours boundaries—is limited. These are plausible organizational strategies that should be tested and monitored rather than assumed to improve well-being.

Bottom line: The evidence is much stronger that excessive and poorly organized workload matters than it is for any single workload-reduction strategy. That is a reason to test thoughtfully—not a reason to leave workload unchanged.

Strategy 2: Ensure adequate staffing & capacity

Workload cannot always be solved by eliminating tasks or improving schedules. Sometimes there are simply too few people—or too little available capacity—to do the work that needs to be done.

When positions are vacant, employees are absent, caseloads grow, or student needs increase without corresponding increases in staffing, the work does not disappear. Remaining staff may absorb additional classes, students, cases, coverage assignments, supervision responsibilities, crisis response, or overtime. Planning and preparation time may be lost to coverage. Administrators and specialists may be pulled away from their primary responsibilities. Other employees may take on duties outside their usual roles.

Adequate staffing should therefore be understood as both an operational issue and a staff well-being issue. If the work is necessary and reasonably designed, but there are not enough people or enough available time to do it, the problem may be capacity rather than efficiency.



Identify the specific capacity issue

"Understaffed" can describe different issues. A school may have unfilled positions. It may have enough positions on paper but frequent absences and too few substitutes. Positions may be filled, but staffing levels do not match current student needs. A specialized employee may technically be available, but responsible for too many students, schools, or responsibilities. Or staff may spend substantial portions of their time covering vacancies or responding to urgent needs rather than doing the work for which they were hired.

Before selecting a solution, determine where capacity is breaking down and what consequences follow. Look beyond vacancy counts. Ask what happens when the available workforce does not match the work that needs to be done. For example, are teachers regularly covering classes during preparation periods? Are paraprofessionals moved between classrooms to fill gaps? Are counselors, social workers, psychologists, nurses, or other specialists carrying caseloads that make preventive or follow-up work difficult? Are administrators routinely filling operational gaps? Are office, transportation, food-service, custodial, technology, or other employees working overtime or operating with persistent vacancies?

Also examine when shortages occur. A school may appear adequately staffed overall but experience predictable capacity problems during particular times of day, days of the week, seasons, programs, or types of absence.

Measure the consequences of vacancies, not the vacancies themselves. Track repeated coverage, overtime, lost planning time, increased caseloads, delayed work, reassignment of staff, unfilled shifts, and services that are reduced or postponed. These may reveal capacity problems that a staffing roster alone will miss.

Four ways to strengthen staffing and capacity

Different capacity problems require different responses. Hiring more people may be part of the solution, but it is not the only way to increase usable capacity.

Strengthen recruitment into hard-to-fill positions

When positions remain vacant, schools and districts may need to expand and strengthen the pathways through which people enter those roles. The appropriate approach will depend heavily on the position and local labor market. Potential strategies may include strengthening

preparation pathways, developing grow-your-own programs, apprenticeships or residencies, providing financial support for preparation, expanding partnerships with colleges or community organizations, and improving hiring processes (Blazar et al., 2026; National Education Association, 2022).

Recruitment efforts should begin with a more basic question: Why is this position difficult to fill? Low applicant numbers can reflect compensation, qualification requirements, scheduling, hours, job design, geographic location, working conditions, lack of awareness of the position, slow hiring processes, or competition from other employers. Recruitment strategies are more likely to help when they address the actual barrier rather than simply advertise the same position more widely.

Improve retention, not just recruitment

Schools cannot recruit their way out of a staffing problem if employees continue to leave. Recruitment and retention should therefore be treated as two sides of the same staffing equation. The NEA synthesis identifies induction and mentoring, useful professional learning, career pathways, and competitive salary structures among potential retention strategies. Compensation and benefits, working conditions, professional autonomy and voice, and hiring practices can affect both recruitment and retention (National Education Association, 2022).

When a position or staff group experiences persistent turnover, ask what current and former employees say about the job. Is compensation competitive? Is the workload sustainable? Do employees have the resources and support needed to do the work? Are schedules predictable? Are employees routinely asked to perform duties outside their intended role? Do they have opportunities to learn and advance? Do they have meaningful influence over decisions affecting their work?

This is one reason staffing should not be treated as an isolated strategy. A retention problem may point back to workload, leadership, autonomy, professional support, student-support systems, compensation, or other sections of this toolkit.

Watch for the "leaky bucket." Adding new employees will not create sustainable capacity if working conditions continue to drive experienced employees away. When turnover is persistent, examine both how people enter the workforce and why they leave.

Build reliable substitute and coverage capacity

Substitute capacity is therefore an important part of organizational capacity. Research on substitute-teacher labor supply shows that whether assignments are accepted varies with

characteristics of the assignment, timing, commute, compensation, and school context (Gershenson, 2012, 2013). When absences remain unfilled, existing employees may be required to absorb coverage responsibilities.

Schools and districts can take a more intentional approach to substitute recruitment, retention, and deployment. Potential strategies include maintaining an active recruitment pipeline rather than recruiting only when shortages become acute; reaching potential substitute pools such as retirees, community members, parents, and recent graduates where appropriate; providing useful orientation, training, and ongoing support; creating full-time or building-based substitute positions where feasible; improving advance-notice and scheduling systems; and coordinating substitute pools across schools or districts.

A substitute shortage may not simply mean "we need more people on the list." Schools can examine whether available substitutes are actually accepting assignments—and why or why not.

Useful questions

- How often are positions successfully covered?
- Which schools, roles, days, or assignment types are hardest to fill?
- How much advance notice do substitutes receive?
- What causes available substitutes to decline assignments?
- What orientation and support do substitutes receive once they arrive?
- Would a building-based or other more stable substitute model address recurring needs?
- What happens to existing employees when an absence is not covered?

Track coverage reliability, not just substitute-pool size. A district may have many people registered as substitutes while still leaving a large proportion of absences uncovered. The more useful measure is whether needed assignments are actually filled.

Use existing capacity where it is needed most

Not every capacity problem requires adding a new position. Sometimes existing staff capacity is poorly matched to when and where work occurs. Schools can examine schedules, assignments, caseloads, staffing patterns, and workflows to determine whether existing capacity could be deployed differently. A particular time of day may repeatedly create

coverage problems. One staff group may carry responsibilities that could reasonably be shared. A specialist may lose substantial time traveling between buildings or completing administrative work that could be handled differently.

This does not mean simply redistributing work to employees who already have full workloads. Instead, ask whether existing staffing patterns reflect current needs and whether changes could make capacity more usable without creating new burdens elsewhere.

Potential approaches might include adjusting schedules around predictable demand, reviewing caseload distribution, reducing unnecessary non-core duties for specialized staff, pooling selected resources across buildings, cross-training employees for appropriate functions, or providing administrative support for work that unnecessarily consumes specialized staff time.

Any redistribution should be assessed across roles. Watch for "capacity shifting." Moving responsibilities from one overloaded employee to another is not a capacity strategy. Ask whether the change creates genuinely usable capacity or simply makes the burden less visible.

Staffing is not always a school-level problem

Some staffing challenges cannot be solved by an individual principal or design team. Compensation structures, position allocations, collective bargaining agreements, licensure requirements, transportation routes, district hiring systems, labor-market shortages, and state funding or policy can all constrain what is possible locally.

The purpose of identifying these constraints is **not to stop the improvement process**. It is to distinguish what can be changed at different levels.

A school may not be able to create a new counselor position, for example, but it may be able to document the consequences of current caseloads, protect existing counselor time from unrelated duties, change how urgent needs are triaged, or bring evidence about the capacity gap to district decision-makers.

Similarly, a district may not control the regional labor supply, but it may control hiring timelines, substitute systems, schedules, compensation within established parameters, onboarding, working conditions, and retention supports.

What schools have actually tried

Grow-your-own programs recruit future educators from the community rather than relying entirely on the external labor market. One example is Maryland's Teacher Academy of

Maryland, a career and technical education program that introduces high school students to teaching and provides a pathway toward the profession.

A 2026 study took advantage of the program's staggered introduction across Maryland high schools to examine its effects over time. Students who had access to the program were more likely to become teachers approximately a decade later. The increase was modest in absolute terms—about 0.6 percentage points—but represented a 45% increase relative to the comparison level (Blazar et al., 2026). Effects differed across groups, and participants did not necessarily return to teach in their home district.

What schools can take from this: When shortages are persistent, consider whether recruitment can begin earlier and closer to home. Grow-your-own approaches can create pathways for students, paraprofessionals, other school employees, or community members who already know the community and may otherwise face barriers to entering educator preparation.

Evidence note: This study provides relatively strong evidence that one grow-your-own model increased entry into teaching. It does not establish that all grow-your-own programs will do so, nor does it demonstrate improved staff well-being. Grow-your-own programs vary substantially in whom they recruit and the supports and preparation they provide.

What does the evidence tell us?

There is substantial evidence that inadequate staffing and organizational resources can increase demands on employees and contribute to difficult working conditions. There is also a substantial workforce literature addressing recruitment, retention, shortages, and turnover. However, as with workload, evidence that the problem matters is stronger than evidence that any particular staffing intervention will improve staff well-being.

Many staffing approaches are supported by a credible rationale and evidence related to recruitment or retention, but considerably fewer studies directly test whether strategies such as building-based substitutes, expanded substitute pools, grow-your-own programs, caseload redistribution, or redesigned staffing models reduce burnout or improve well-being.

That distinction is particularly important here. A strategy might successfully increase hiring or reduce vacancies without necessarily improving staff well-being. Those outcomes are related, but they are not interchangeable.

CORE STRATEGY	EVIDENCE CLASSIFICATION	WHAT THE EVIDENCE SUGGESTS	LIMITATIONS/ CAUTIONS
Strengthen recruitment into hard-to-fill positions	Promising / emerging	Workforce evidence supports approaches such as grow-your-own programs, residencies, apprenticeships, financial supports, and strengthened preparation pathways. Recent quasi-experimental evidence from Maryland found that access to a high-school grow-your-own program increased subsequent entry into teaching (Blazar et al., 2026). Evidence varies considerably across models and populations (National Education Association, 2022).	Evidence varies considerably by strategy and workforce group. Increasing applicants or hires does not demonstrate improved staff well-being, and recruitment will have limited long-term effect if turnover remains high.
Improve retention and working conditions	Strong rationale; strategy evidence varies	Compensation, working conditions, autonomy and voice, professional support, induction and mentoring, and career opportunities are associated with recruitment and retention (Learning Policy Institute, 2026). Addressing conditions that contribute to turnover is therefore an important part of a sustainable staffing response (National Education Association, 2022).	"Improve retention" is not itself a single intervention. Evidence for specific approaches varies and is often teacher-focused. Retention outcomes should not automatically be interpreted as evidence of improved well-being.
Build reliable substitute and coverage capacity	Promising / emerging	Research on substitute-teacher labor supply indicates that assignment acceptance is influenced by compensation, commute time, timing of the offer, assignment characteristics, and school context (Gershenson, 2012, 2013).	Evidence about the substitute labor market and assignment acceptance is stronger than evidence about downstream staff well-being. Improved substitute coverage has a credible pathway to

CORE STRATEGY	EVIDENCE CLASSIFICATION	WHAT THE EVIDENCE SUGGESTS	LIMITATIONS/ CAUTIONS
		More recent research also identifies pay, flexibility, working conditions, and support and respect as important factors in attracting and retaining substitutes (Torres et al., 2026). Targeted financial incentives have increased substitute coverage in schools with historically low fill rates, providing direct evidence that at least some changes to substitute systems can improve coverage (Kraft et al., 2022).	reducing coverage demands on existing employees, but direct evidence that substitute-system reforms reduce workload, stress, or burnout among other school staff is limited.
Improve deployment and use of existing capacity	Promising / emerging	Research on specialized school staff suggests that caseload size, staffing ratios, role expectations, and how staff time is allocated can affect their capacity to provide intended services (Eklund et al., 2017; Shi & Brown, 2020). Aligning staffing, schedules, caseloads, and responsibilities with actual demand therefore has a strong organizational rationale for making better use of existing capacity.	Evidence is stronger for the relationship between staffing/ caseload conditions and service capacity than for particular strategies for redeploying existing staff. Direct evidence that schedule, caseload, or responsibility redesign improves staff well-being is limited, and redistribution can simply shift burden to another employee or staff group.

Strategy 3: Strengthen leadership, supervision, & organizational support

School leaders and supervisors influence many of the conditions that shape staff well-being: workload, communication, access to resources, autonomy, relationships, recognition, opportunities for growth, and whether employees believe concerns will be taken seriously.

Leadership therefore matters not simply because supportive leaders make staff "feel better." Leaders help create—or constrain—the conditions under which staff do their work.

Research consistently identifies school-leader support as an important resource for teacher well-being. In a 2026 systematic review of 366 empirical studies, Moens et al. identified school-leader support in 86 studies; across the literature, supportive leadership was associated with lower stress and burnout and with greater well-being, job satisfaction, and engagement. In a study of more than 1,500 teachers across 73 schools, Ford et al. (2019) similarly found that leader support for teachers' psychological needs was associated with burnout, organizational commitment, and intentions to leave.



Qualitative research helps clarify what supportive leadership can look like in practice. Lambersky (2016) described ways principals influenced teacher morale, stress, burnout, commitment, and efficacy through professional respect, recognition, protection from harmful experiences, visible engagement, listening to teacher voice, and communicating a meaningful vision. Research in hard-to-staff schools has similarly linked principal support with teacher retention (Hughes et al., 2015).

However, as elsewhere in this toolkit, much of this evidence is observational and teacher-focused. Evidence that leadership matters is stronger than evidence identifying a particular leadership intervention that reliably improves staff well-being.

"Be more supportive" is not a strategy

Supportive leadership is not a substitute for addressing workload, staffing, student behavior, or other organizational causes of stress. Leadership matters in part because leaders have the authority to act on conditions that individual employees cannot change themselves.

Start by asking what "support" means

When staff say they do not feel supported, it can be tempting to assume that leaders need to be friendlier, more appreciative, or more available. Sometimes those things matter. But "support" can mean many different things.

Staff may need a supervisor to help solve a difficult problem. They may want clearer expectations or useful feedback. Staff may need someone with authority to address an unreasonable workload, obtain resources, respond to a safety concern, resolve conflicting expectations, improve a broken process, or intervene when a difficult situation cannot reasonably be managed by one employee. Newer employees may need mentoring and frequent guidance, while experienced staff may value professional trust, autonomy, and opportunities to lead.

Different staff groups may also have very different relationships with formal supervisors. Some employees receive regular observation, feedback, and professional development. Others may interact with a supervisor primarily when something goes wrong—or receive very little meaningful supervision at all.

Before choosing a strategy, determine what kind of support is missing, for whom, and under what circumstances.

Consider:

- What kind of support is missing?
- For whom?
- When is support most needed?
- What happens when staff ask for help?
- Can supervisors actually help resolve the problems staff bring to them?
- Do employees receive useful feedback and guidance?
- Can staff raise difficult issues without fear of negative consequences?
- Do leaders communicate clearly about decisions and follow through on commitments?
- Which employees receive meaningful developmental support, and which receive primarily evaluation—or little supervision at all?

The goal is to move from a broad conclusion such as "staff don't feel supported" to a condition specific enough to change.

Four ways to strengthen leadership and organizational support

Make leadership responsive and trustworthy

Supportive leadership begins with relationships, but is demonstrated through action. Research on teacher working conditions identifies professional respect, trust, communication, responsiveness, and meaningful involvement in decisions as important aspects of the leadership environment. Lambersky's (2016) qualitative research, for example, described ways principals influenced teacher morale, stress, burnout, commitment, and efficacy through professional respect, recognition, protection from harmful experiences, visible engagement, listening to teacher voice, and communicating a meaningful vision. Research in hard-to-staff schools has similarly linked principal support with teacher retention (Hughes et al., 2015).

Schools and districts can strengthen supportive leadership by creating regular opportunities for leaders to learn what helps or interferes with employees' ability to do their work; responding to concerns with visible follow-through; communicating clearly and consistently; and ensuring that

staff can raise concerns about workload, safety, harassment, discrimination, bullying, student behavior, or organizational practices without retaliation.

When something cannot be changed, responsiveness still matters. Leaders can explain the constraint, what alternatives were considered, what can be changed, and what will happen next.

Close the feedback loop. Staff should not have to guess what happened to a concern after they raised it. A useful response may be "Here is what we heard → here is what we learned → here is what we are doing → here is what we cannot change and why." Listening without follow-through can have the opposite of the intended effect.

Listening is not, by itself, a well-being intervention.

Repeatedly asking employees what is wrong without acting—or without explaining legitimate constraints—can increase cynicism rather than trust.

Use leadership authority to improve working conditions

One of the most important forms of organizational support is the willingness and ability to address barriers that employees cannot change themselves. A staff member can improve personal time-management practices but cannot eliminate a district reporting requirement. A teacher can develop strategies for responding to difficult student behavior but cannot create a functioning schoolwide response system alone. A counselor cannot individually solve an excessive caseload. A paraprofessional cannot independently change a schedule that leaves insufficient coverage.

Leaders can ask: What is making it difficult for staff to do this work well—and which parts of that problem require someone with organizational authority to act?

Depending on the problem, leadership support may mean protecting planning time, obtaining resources, clarifying roles, changing a process, coordinating across departments, addressing unsafe conditions, advocating for additional staffing, resolving conflicting expectations, or discontinuing lower-priority work. This also means protecting staff from unnecessary organizational demands when leaders have the authority to do so.

Watch for individualizing an organizational problem. A supervisor may be tempted to respond to an overwhelmed employee with advice about resilience, organization, or self-care. Before doing so, ask whether the employee is struggling with something they can reasonably change—or with workload, staffing, systems, resources, policies, or expectations that require organizational action.

Make supervision developmental and useful

Supervision is one of the most direct ways employees experience organizational support. Yet supervision can mean very different things across schools and staff roles. For some employees, it includes regular coaching, feedback, mentoring, and problem solving. For others, supervision is primarily evaluative or corrective. Some staff may have little regular contact with anyone who understands their work well enough to provide meaningful guidance.

Useful supervision should help employees do their work well, not merely determine whether they are meeting expectations. Depending on the role, supervision might include discussing challenging situations, identifying barriers to effective work, clarifying expectations, providing constructive feedback, connecting staff with resources or expertise, supporting professional development, and jointly solving problems.

Supervisors should also be able to distinguish between an individual performance problem and an organizational barrier. If several capable employees struggle with the same process, workload, policy, or responsibility, repeated individual coaching may not be the appropriate response. The pattern may indicate that the work itself needs to change.

Useful supervision questions might include:

- What is going well?
- Where are you getting stuck?
- What is making this work harder than it needs to be?
- What support or information would help?
- Is there something in the system or work environment that needs to change?
- What can I help remove, clarify, or resolve?

Do not reserve supervision for problems. If employees hear from supervisors primarily when something has gone wrong, supervision can become associated with correction rather than support. Regular developmental conversations create opportunities to identify problems earlier and provide support before difficulties become crises.

Different roles may require different sources of developmental support. A direct supervisor does not need to provide every kind of expertise an employee needs. Mentoring, coaching, peer consultation, professional learning, and access to specialized expertise can complement supervision. These forms of support are discussed more fully in Strategy 5: Strengthen Professional & Relational Support.

Strengthen the people who supervise and lead

"Improve leadership" is too broad to guide action. Leadership development is more useful when schools identify the specific behaviors they want to strengthen. Districts can then assess strengths and needs and provide development around those particular practices.

This may include:

- confidential staff feedback;
- leader self-reflection;
- coaching or mentoring;
- practice with realistic leadership situations;
- peer learning among principals and supervisors; and
- periodic reassessment of whether staff actually experience changes in the targeted practices.

The National Education Association's synthesis of educator-shortage research recommends strengthening administrators' capacity to collaborate with staff, share decision making, communicate effectively, and provide emotional, environmental, and instructional support.

Develop behaviors, not abstractions. Instead of setting a goal to "improve supportive leadership," identify something leaders will actually do differently—for example, acknowledge staff concerns within a specified period, explain what action will follow, or routinely ask about organizational barriers during supervision.

Leadership development also requires attention to leaders' own working conditions. A principal or supervisor who is responsible for an unmanageable number of employees, has inadequate authority or resources, or is overwhelmed by operational demands may struggle to provide meaningful supervision even with excellent interpersonal skills. In those cases, the solution may require changes in supervisory structure or organizational capacity as well as skill development.

Recognition matters—but it cannot substitute for support.

Acknowledging employees' contributions can be an important part of supportive leadership. Recognition can communicate respect and help employees know that their work is seen and valued.

But appreciation becomes problematic when it substitutes for addressing conditions employees have repeatedly identified as harmful. A thank-you breakfast does not compensate for chronic understaffing. Recognition does not restore lost planning time or resolve an unsafe working condition. Recognition is most meaningful when staff also see leaders working to improve the conditions under which they do their jobs.

What schools have actually tried

In a randomized study involving 52 elementary and middle-school principals, Goff et al. (2014) tested an approach in which teachers provided repeated feedback about principals' leadership and principals received coaching designed to help them interpret and act on that feedback.

The study illustrates a practical principle: collecting feedback about leadership may not be enough. Leaders may also need structured support to understand the feedback, identify behaviors they can change, and put those changes into practice.

What schools can take from this: Consider combining confidential staff feedback with structured reflection and coaching rather than treating a leadership survey as an endpoint. Feedback can identify where staff experience leadership differently than leaders intend; coaching or another structured development process can help turn those findings into specific behavioral changes.

Evidence note: This study examined changes in leadership behavior rather than staff well-being. It therefore provides evidence about a way to strengthen leadership—not evidence that leadership coaching itself reduces staff burnout.

What does the evidence tell us?

Supportive leadership is one of the more consistently identified organizational factors associated with teacher well-being, job satisfaction, organizational commitment, and retention. Evidence also supports several component practices—including supportive relationships, mentoring, coaching, feedback, professional respect, and opportunities for meaningful influence. However, the evidence is not equally strong for every proposed leadership intervention.

Much of the literature demonstrates associations between employees' experiences of leadership and important outcomes. There is less direct intervention research showing that a particular leadership-development or supervision model reliably improves staff well-being. As

elsewhere in Part 2, it is important to distinguish evidence that leadership matters from evidence that a particular strategy for changing leadership behavior works.

Core strategy	Evidence classification	What the evidence suggests	Important limitations and cautions
Build responsive, trustworthy, and supportive leadership	Strong	A substantial observational literature links supportive and effective school leadership with lower teacher burnout, stronger organizational commitment, greater job satisfaction, and lower intentions or likelihood of leaving (Ford et al., 2019; Hughes et al., 2015; Lambersky, 2016; Moens et al., 2026).	Much of the evidence is observational rather than experimental. The strongest literature concerns teachers, although some whole-school staff research points in the same direction. "Supportive leadership" also encompasses many different behaviors.
Use leadership authority to improve working conditions	Strong rationale; strategy evidence varies	Leaders shape resources, workload, communication, policies, priorities, and other organizational conditions associated with staff well-being. Using leadership authority to remove organizational barriers therefore has a strong conceptual and empirical rationale (Moens et al., 2026).	The specific action needed depends on the underlying problem. Evidence that leadership and working conditions matter does not establish that every leader-directed organizational change will improve well-being.
Provide developmental and useful supervision	Promising / emerging	Research supports several component practices that can contribute to developmental supervision, including mentoring, coaching, useful feedback, and ongoing professional support (Goff et al., 2014; Luong, 2025; Smet, 2025).	Direct evidence testing supervision models specifically as school-staff well-being interventions is limited. Different staff roles also receive very different forms and amounts of supervision.
Develop leaders and supervisors through coaching,	Promising / emerging	Research supports several component practices that can contribute to developmental supervision, including mentoring, coaching, useful	Evidence that leadership development changes leader behavior is not the same as evidence that it improves staff well-being.

Core strategy	Evidence classification	What the evidence suggests	Important limitations and cautions
feedback, and ongoing learning		feedback, and ongoing professional support (Goff et al., 2014; Luong, 2025; Smet, 2025). Together, these provide a credible foundation for supervision that emphasizes development and problem solving rather than evaluation alone. Evidence is stronger for individual components than for developmental supervision as a distinct staff well-being intervention.	Effects likely depend on the content, intensity, organizational context, and leaders' ability to act on what they learn.

Bottom line: There is strong evidence that the leadership environment matters. There is less evidence identifying a single leadership-development or supervision intervention that reliably improves staff well-being across contexts. Schools should therefore identify the specific leadership or supervisory experience they want to change, select an approach with a credible rationale, and assess whether staff actually experience the intended improvement.

If employees primarily report that leaders do not listen, respond, follow through, provide useful supervision, or act on organizational barriers, remain in Strategy 3. If the central problem is that employees have too little influence over decisions or too little reasonable discretion in how they perform their work, continue to Strategy 4: Give Staff Meaningful Roles in Solving Workplace Problems. If staff primarily need mentoring, coaching, consultation, collegial connection, or role-specific expertise, continue to Strategy 5: Strengthen Professional & Relational Support.

Strategy 4: Give staff meaningful roles in solving workplace problems

Having a voice in one's workplace is different from being asked for an opinion. Authentic voice means that staff expertise has a meaningful opportunity to influence decisions that affect their work.

Professional autonomy is related, but different. Autonomy does not mean that every employee operates independently or that shared expectations disappear. It means having reasonable discretion over how work is carried out within the requirements, goals, and responsibilities of the role.

Both matter because staff are not simply recipients of workplace decisions. They often have information that decision makers need: where a process breaks down, which requirements consume unnecessary time, what students need, what unintended consequences a proposed change may create, and what makes a strategy workable in practice.



Staff voice plays two roles in this toolkit. Throughout Part 1, staff participation is part of *how* the well-being improvement process should be carried out. In this strategy, voice, influence, and autonomy are themselves potential *targets for change*. Use this strategy when staff experience too little meaningful influence over workplace decisions or too little reasonable discretion in carrying out their work.

he evidence is strongest for teachers. Research has consistently associated professional autonomy, participation in school decision making, and opportunities for leadership with teacher job satisfaction, well-being, commitment, and retention-related outcomes (Nguyen & Kokotsaki, 2024; OECD, 2025). Recent U.S. research also found that teacher autonomy was associated with job satisfaction and burnout, although the evidence is observational rather than proof that increasing autonomy will necessarily improve those outcomes (Ha et al., 2025).

The practical question is therefore not simply: "Did we ask staff what they think?" It is: "Where can staff expertise meaningfully shape what happens?"

"Staff need more voice" is not yet a strategy.

A staff member who wants greater discretion over how to organize daily work has a different need from someone who wants input into a district policy. A team frustrated because decisions are made without consulting the people who perform the work faces a different problem from employees who are routinely surveyed but never learn what happened to their feedback.

Before choosing a strategy, ask:

- Which decisions or aspects of work are staff concerned about?
- Is the issue lack of input, lack of influence, or lack of reasonable discretion?
- Who currently makes the decision?
- Whose knowledge is needed to make it well?
- What parts of the decision are genuinely open to influence?
- What is constrained by law, contracts, safety requirements, funding, policy, or other conditions?
- Which staff are routinely represented—and whose expertise is missing?

This distinction matters. A new committee will not solve a problem caused by unnecessary approval requirements. Greater autonomy will not solve a problem when employees actually need coordinated organizational action. A survey will not create meaningful voice if the important decisions have already been made.

Three ways to strengthen staff voice, influence, and autonomy

Involve staff in decisions that affect their work

Staff participation is most meaningful when it occurs **early enough to affect the decision** and when the people doing the work have a genuine role in defining the problem, considering alternatives, or shaping implementation.

Schools and districts might:

- establish joint staff–administration teams with clearly defined areas of authority;
- include people who perform the work when redesigning schedules, documentation, meetings, student-support procedures, technology systems, or other work processes;
- involve staff before a preferred solution has already been selected;
- create structured ways for employees to propose improvements;
- include affected staff when reviewing new policies, initiatives, or procedures after implementation; and
- create teacher-leader and other staff-leadership roles that allow employees to contribute expertise without necessarily moving into formal administration.

The appropriate form of participation depends on the decision. Not every decision requires a committee or organization-wide vote. Sometimes a small group of people who understand the work can help redesign a process. Sometimes broad input is needed. Sometimes staff should make the decision. Sometimes leadership must make it but needs staff knowledge before doing so.

Match the level of participation to the decision

One practical way to avoid confusion is to tell staff what kind of participation is actually available. Depending on the situation, staff voice may be used to:

- **INFORM**: The decision is fixed, but staff need to understand what is changing and why.
- **CONSULT:** Leadership will make the decision after seeking staff perspectives and considering them.

- **CO-DESIGN:** Staff and leaders will develop and evaluate options together.
- **DELEGATE:** Within agreed-upon boundaries, staff or teams have authority to decide.

The specific labels matter less than the clarity. Do not invite people to co-design something when the actual opportunity is consultation. That mismatch can make a technically participatory process feel manipulative.

Create leadership opportunities without requiring people to leave their roles

One way to strengthen influence is to create opportunities for staff to contribute expertise beyond their immediate responsibilities. For teachers, this may include mentoring, coaching, curriculum leadership, improvement teams, or other teacher-leader roles that allow experienced educators to influence practice and organizational decisions without becoming administrators.

The same principle can be applied beyond teachers. A paraprofessional may have valuable expertise about student transitions or classroom routines. Administrative assistants may understand communication and workflow problems that others do not see. Transportation staff may identify scheduling or safety problems invisible to school-based teams. Facilities, food-service, technology, security, and student-support staff each hold forms of operational knowledge that can improve organizational decisions.

The question is not simply who holds a formal leadership title, but whose knowledge would help us solve this problem well. Where additional responsibilities are substantial, schools should also consider workload, compensation, and role clarity rather than treating leadership opportunities as unpaid extra work.

Provide reasonable autonomy and flexibility

> **Voice concerns influence over decisions. Autonomy concerns reasonable control over one's own work.**

Schools necessarily operate within many constraints. Staff cannot individually decide whether to follow legal requirements, student-safety procedures, contractual obligations, instructional standards, or essential organizational policies. But fixed requirements do not mean that every aspect of work needs to be prescribed. Schools can look for areas where employees or teams can exercise greater discretion over how work gets done.

Depending on the role and setting, possibilities might include:

- Increasing appropriate discretion in instructional or professional practice;
- reducing unnecessary approval requirements;
- offering meaningful choices in professional learning;
- giving teams flexibility in how they accomplish agreed-upon goals;
- allowing staff to organize workflows or routines in ways that fit their responsibilities;
- giving employees input into schedules, procedures, or tools that directly affect their work; or
- where responsibilities permit, providing reasonable flexibility in when or where non-student-facing work is completed.

The goal is not maximum autonomy. It is appropriate autonomy: enough discretion for employees to use their expertise, judgment, and knowledge of the work without sacrificing coordination, equity, safety, or shared organizational goals.

Look for unnecessary control

A useful question is: Which requirements are genuinely necessary—and which exist because "this is how we have always done it"?

Approval steps, rigid procedures, standardized meeting structures, scheduling practices, documentation requirements, and other routines may have legitimate purposes. But they can also persist after the original need has changed. Ask the people who perform the work where additional discretion would make the work more effective or manageable—and what guardrails would still be needed.

Autonomy is not abandonment

This distinction is especially important. Giving an overwhelmed employee "freedom to figure it out" without adequate staffing, resources, role clarity, coordination, or access to help is not meaningful autonomy. It may simply transfer responsibility for solving an organizational problem to the individual employee. Supported autonomy combines appropriate discretion with clear expectations, adequate resources, and access to help when it is needed.

Make staff input consequential and accessible

Staff voice is unlikely to feel meaningful if employees repeatedly provide input without seeing how it affects decisions. After seeking input, communicate what was heard, what was

considered, what was decided, and why. At the same time, examine whose voices actually carry influence. Participation structures can unintentionally privilege employees whose schedules, professional status, relationships, language, or comfort with leadership make participation easier. Design opportunities so that staff affected by a decision have a realistic opportunity to contribute.

For guidance on gathering inclusive staff input during the well-being improvement process itself, see Phase 2.

Close the loop

After seeking staff input, communicate: What we heard → What we considered → What we decided → Why → What happens next.

If staff recommendations were not adopted, explain why. If only part of a decision was open to influence, say so. If input changed the original plan, make that visible. If additional information is needed before a decision can be made, explain the next step.

> **Asking for input creates an obligation to respond to it — not an obligation to agree with it.**

Pay attention to whose voice carries weight

Creating opportunities for participation does not guarantee that everyone has an equal opportunity to influence what happens. Formal authority matters. So do professional status, race and ethnicity, gender, language, job classification, schedule, seniority, employment status, location, relationships with administrators, and previous experiences of speaking up.

A meeting held during the school day may work well for teachers with release coverage but exclude transportation or food-service employees. An open discussion with administrators may produce useful input from some staff while discouraging others. A committee with one paraprofessional and eight licensed professionals technically includes paraprofessional representation without necessarily giving that perspective meaningful influence.

When designing opportunities for staff voice, ask:

- Who can participate?
- Who is missing?
- Whose knowledge is treated as expertise?
- Who can disagree safely?

- Whose schedules or working conditions make participation difficult?
- Are some staff expected to contribute this work without compensated time?
- Does participation change anything—or merely create the appearance of inclusion?

Do not make participation another burden

Meaningful participation requires time. An organization can unintentionally make working conditions worse by responding to staff concerns with more committees, more meetings, more surveys, and more improvement work layered onto already-full jobs.

Before creating a new participation structure, ask: Can staff meaningfully participate within their existing work time? What should be removed, shortened, combined, or compensated to make participation possible?

Use existing structures when they work. Provide release time or compensation when substantial additional participation is necessary and feasible. And do not assume that every employee wants to participate in every decision. The goal is access to meaningful influence, not universal committee membership.

What schools have actually tried

Give staff formal—not merely advisory—decision-making authority. Some schools have created structures in which teachers collectively hold authority over important aspects of school operations. Teacher-powered schools provide one example. At Avalon School in St. Paul, Minnesota, teachers' decision-making authority is embedded in the school's governance structure. Teachers have substantial collective influence over school design and decisions rather than serving only in an advisory role.

Teacher-powered arrangements vary considerably. Across schools, teacher teams may have authority over areas such as curriculum and instruction, staffing, schedules, professional learning, budget, school policy, or other aspects of school operations.

What schools can take from this: Schools do not need to become fully teacher-powered to apply the underlying principle. Identify decisions where the knowledge of people doing the work is especially important and consider whether staff can be given clearly defined decision-making authority rather than simply being asked for input. Start with a bounded area where authority, constraints, and accountability can be made explicit.

Evidence note: Teacher-powered schools demonstrate that substantial collective staff autonomy is feasible, but they should not be treated as evidence that transferring decision-making authority necessarily improves staff well-being. Existing research on these schools is much more limited than the broader evidence associating teacher autonomy and voice with positive workplace outcomes.

What does the evidence tell us?

Research provides a reasonably strong basis for treating voice, influence, and autonomy as important workplace conditions, particularly for teachers. A recent review drawing on 355 research outputs identified professional autonomy, development, and voice as interconnected leadership conditions relevant to teacher well-being, commitment, and retention (Nguyen & Kokotsaki, 2024). TALIS 2024 likewise found that greater teacher autonomy and participation in leadership were associated with greater job satisfaction and well-being, although these relationships should not be interpreted as evidence that a particular participation intervention causes improved well-being (OECD, 2025).

CORE STRATEGY	EVIDENCE CLASSIFICATION	WHAT THE EVIDENCE SUGGESTS	LIMITATIONS/ CAUTIONS
Increase meaningful staff influence in workplace decisions	Strong evidence that the factor matters; strategy evidence varies	Teacher working-condition research associates participation in school decision making, professional voice, and shared leadership with job satisfaction, well-being, commitment, and retention-related outcomes (Nguyen & Kokotsaki, 2024; OECD, 2025).	Evidence is predominantly teacher-focused and often observational. Participation structures vary substantially, and participation alone does not demonstrate improved well-being.
Increase reasonable professional autonomy and flexibility	Strong evidence that the factor matters; strategy evidence varies	Professional autonomy is consistently identified as an important teacher job resource. TALIS 2024 found greater instructional autonomy associated with higher job satisfaction and well-being and lower stress; U.S. survey research	Appropriate autonomy differs by role. Greater discretion without adequate resources, coordination, or support may function as abandonment rather than empowerment.

CORE STRATEGY	EVIDENCE CLASSIFICATION	WHAT THE EVIDENCE SUGGESTS	LIMITATIONS/ CAUTIONS
		similarly links autonomy with job satisfaction and burnout (Ha et al., 2025; OECD, 2025).	
Use co-design and collaborative problem solving	Promising / strong rationale	Including people who perform the work in problem definition and strategy design is consistent with human-centered design and participatory improvement approaches and provides a strong rationale for co-design. However, direct evidence that co-design itself improves school-staff well-being is limited.	Direct evidence linking specific co-design approaches to school-staff well-being outcomes is limited. Poorly designed participation can add burden or reproduce existing power differences.

Bottom line: Voice is not the opportunity to speak. It is a credible opportunity to influence something that matters. Schools do not need to turn every organizational decision into consensus. Nor does autonomy mean eliminating shared expectations. Instead, identify decisions where staff knowledge should matter, involve the people closest to the work early enough to shape those decisions, provide reasonable discretion where it is possible, and be transparent about where staff influence begins and ends.

Then assess the experience from the staff perspective: Did people understand what was open to influence? Were the right people included? Did their input affect the process or decision? Do employees have reasonable control over aspects of work where their professional judgment matters? Did participation improve the work—or simply add another demand?

Connections to other strategies

If staff primarily report that leaders do not listen, respond, follow through, or use their authority to address organizational barriers: return to Strategy 3: Strengthen Leadership, Supervision, & Organizational Support. If staff have meaningful decision-making authority but lack mentoring, consultation, expertise, or collegial connection needed to do the work well: continue to

Strategy 5: Strengthen Professional & Relational Support. If the issue is primarily that new initiatives and decisions are repeatedly introduced without considering staff workload or existing demands: also see Strategy 7: Manage Organizational Change & Competing Demands.

Strategy 5: Strengthen professional & relational support

School staff do demanding work that often requires judgment, problem solving, emotional labor, and specialized knowledge. Even highly skilled employees will sometimes encounter situations they cannot—or should not have to—manage alone.

Professional and relational support can provide access to expertise, perspective, practical assistance, feedback, encouragement, and shared problem solving. Support may come from mentors, coaches, colleagues, teams, specialists, professional communities, or other trusted people who understand the work.

These forms of support are related, but they do not serve exactly the same purpose. A new teacher who needs help planning instruction, a paraprofessional responding to challenging student behavior, a counselor managing an unusually complex case, an administrative assistant learning a new system, and an experienced employee who feels professionally isolated may all need "support"—but not the same support.



The goal is not simply to create more opportunities for staff to connect. The goal is to make useful support available when people need it, in a form that actually helps with the work they are trying to do.

There is a strong rationale for treating professional and relational support as workplace resources. In a systematic review of 366 empirical studies of teacher well-being, Moens et al. (2026) identified collegial support and collaboration among the most commonly studied job resources. Collaboration was examined in 68 studies and was associated across the literature with lower stress and burnout and greater well-being, job satisfaction, and work engagement. Research outside education likewise identifies coworker support as a workplace resource associated with lower burnout, greater job satisfaction, and lower intentions to leave (Norling & Chopik, 2020).

As elsewhere in this toolkit, however, the school-specific literature is heavily teacher-focused. Different forms of support also have different evidence bases. Evidence that supportive professional relationships matter is stronger than evidence that any particular mentoring, coaching, peer-support, or collaboration model will improve staff well-being.

Start by asking what kind of support is missing

When staff say they need "more support," identify the function that support needs to serve.

Do staff need:

- expertise they do not currently have?
- guidance while learning a new role or responsibility?
- consultation about a difficult student, family, or work situation?
- feedback or coaching to strengthen a skill?
- practical assistance when circumstances exceed what one person can reasonably manage?
- colleagues with whom they can solve problems?
- connection and belonging in a role that feels professionally isolated?
- support following an unusually difficult or distressing event?

These needs call for different responses. A mentoring program will not solve the problem if staff actually need immediate access to behavioral expertise. More team meetings will not help if the problem is that employees lack someone who can answer a technical question. A social event may create opportunities for connection but will not substitute for professional consultation when staff are managing complex work.

"More support" is not yet a strategy. Identify what people need help with, who can realistically provide that help, and how staff will access it when they need it.

Four ways to strengthen professional and relational support

Provide mentoring and role-transition support

New employees often need more than orientation to policies and procedures. They need someone who can help them interpret the role, navigate unfamiliar situations, understand organizational norms, solve problems, and develop confidence in the work.

Mentoring is one way to provide that support. A mentor may help an employee:

- understand expectations and routines;
- work through unfamiliar or difficult situations;
- locate resources and expertise;
- reflect on practice;
- navigate organizational relationships and systems; and
- develop professional confidence and connection.

The strongest school-based mentoring literature concerns **teachers early in their careers**. A review focused specifically on early-career teacher well-being concluded that mentoring may provide important emotional and personal support in addition to professional learning, while also noting considerable variation in mentoring and induction models and a need for stronger research (Squires, 2019).

That caution is important. In a large randomized evaluation involving 1,009 beginning teachers in 418 schools across 17 districts, teachers offered comprehensive induction received intensive

mentoring and other supports. The intervention increased the amount of support teachers received, but did not improve teacher retention over the three-year follow-up period or classroom practice during the first year (Glazerman et al., 2010).

Assigning a mentor is not the same as providing useful mentoring.

Match mentoring to the need

Consider whether the person providing support:

- understands the employee's role;
- has relevant expertise;
- has enough time to provide meaningful support;
- can maintain appropriate confidentiality;
- is viewed as credible and trustworthy; and
- has preparation or guidance for the mentoring role.

Whenever possible, protect time for mentoring rather than expecting mentors and mentees to fit it around already-full workloads.

Do not limit transition support to teachers

Many school employees enter complex roles with little structured professional support. Consider what transition support looks like for paraprofessionals, school mental-health staff, nurses, office staff, transportation staff, facilities staff, food-service staff, technology staff, substitutes, security staff, and others.

The appropriate model may not be formal mentoring. A new bus driver might benefit from an experienced peer who can help navigate routes, student situations, and district procedures. A paraprofessional may need structured access to a teacher or behavior specialist. A new school counselor may need consultation with another counselor who understands the ethical and clinical demands of the role.

Published evidence for mentoring among these staff groups is sparse. Local staff experience should therefore play a particularly important role in determining what support is needed and whether it is useful.

Make coaching, consultation, and expertise easy to access

Mentoring is often broad and relationship-based. Other situations call for more focused professional support.

- **Coaching** helps someone develop or strengthen an area of practice through activities such as observation, reflection, feedback, modeling, practice, and problem solving.
- **Consultation** provides access to expertise around a particular problem or situation.
- **Specialized professional support** connects employees with knowledge that cannot reasonably be expected of every staff member.

The distinction matters because the support should fit the problem. A teacher struggling with classroom routines might benefit from instructional or behavioral coaching. A paraprofessional supporting a student with complex needs may need consultation with a special educator or behavior specialist. A school social worker managing an unusual clinical or ethical situation may need professional consultation. An office employee implementing a new information system may need rapid access to technical expertise.

Put support close to the work

Support is often more useful when employees can obtain it while they are encountering the problem rather than waiting weeks for a training or meeting.

Depending on the need, schools and districts might create:

- scheduled consultation times;
- on-call or clearly identified specialists;
- coaching cycles;
- peer consultation groups;
- case-consultation meetings;
- office hours with specialists;
- role-specific communities of practice; or
- clear pathways for requesting help.

There is substantial evidence that coaching can improve professional practice, at least among teachers. Kraft et al. (2018) synthesized 60 studies using causal research designs and found average positive effects of teacher coaching on instructional practice and student achievement. However, most studies involved prekindergarten or elementary literacy coaching, and the outcomes were practice and student achievement rather than teacher well-being.

This illustrates an important distinction: Evidence that support helps staff do their work more effectively is not automatically evidence that it reduces stress or burnout.

Make it safe to ask for help

Employees may be less likely to seek assistance if asking for help is treated as evidence of incompetence or if professional support is closely tied to formal evaluation. That does not mean a supervisor can never provide coaching or consultation; Strategy 3 discusses developmental supervision. But when schools create other forms of professional support, be clear about their purpose, confidentiality, and relationship to evaluation.

> **Asking for help should be treated as part of competent professional practice—not evidence that someone is failing.**

Strengthen collegial collaboration and shared problem solving

Colleagues can provide expertise, practical assistance, perspective, emotional support, and shared problem solving. The evidence that collegial relationships matter is relatively strong. In Moens et al.'s (2026) systematic review, collaboration appeared in 68 studies. Across that literature it was associated with lower stress and burnout and greater well-being, job satisfaction, and engagement. Importantly, the review describes collaboration not simply as an interpersonal characteristic but as something that can be facilitated by organizational structures and leadership practices.

Research on professional learning communities provides related evidence. A recent cross-national study of 127,339 teachers in 40 countries found a robust positive association between participation in professional learning communities and job satisfaction, although associations with self-efficacy and instructional clarity varied across contexts (Sims & Fletcher-Wood, 2025). Systematic review evidence also indicates that successful teacher communities depend on conditions such as trust, respect, leadership, and group dynamics rather than simply putting teachers into groups (Vangrieken et al., 2017).

There is also some evidence beyond teachers. A 2025 scoping review of 72 studies examining teacher–paraeducator relationships identified collegial relationships, role clarity, communication, and collaboration as important features of the teacher–paraeducator working

relationship. The review also highlights how much remains unknown about interventions designed specifically to improve these relationships and staff outcomes.

Collaboration is not inherently supportive

Poorly designed collaboration can become another demand: another meeting, another committee, another expectation to provide unpaid emotional labor, or another setting in which some voices dominate. Build collaboration around useful work.

Examples might include:

- common planning or problem-solving time;
- role-alike consultation groups;
- interdisciplinary teams addressing complex student needs;
- structured peer consultation;
- shared development of materials or resources;
- peer observation and feedback;
- communities of practice around recurring challenges; or
- cross-role problem solving when work depends on coordination among several groups.

The test is not whether employees are meeting together. It is whether the structure gives them access to something they need. Collaboration should help people do the work—not simply create more work to do together.

Protect time for collaboration

Expecting employees to collaborate without providing time can undermine the intended benefit. If a school creates peer consultation, mentoring, collaborative planning, or professional-learning structures, ask: What time will this require? What existing work will be reduced, replaced, or reorganized to make room for it?

This is particularly important for employees whose schedules provide little discretionary time. A teacher may have common planning periods, while a paraprofessional, bus driver, food-service employee, office employee, or custodian may have little or no comparable time built into the workday.

Strengthen belonging and mutual support—without turning coworkers into therapists

Relational support matters even when no particular technical problem needs to be solved. Work can be easier to sustain when employees feel that they belong, are respected, can ask for help, and do not have to manage difficult experiences entirely alone.

This is related to—but broader than—formal collaboration. A colleague who listens after a difficult interaction, checks in after a stressful event, shares practical help, or makes an isolated employee feel part of the workplace can provide a meaningful resource.

The broader occupational literature supports this rationale. In two large studies totaling 5,666 working adults, greater coworker support was associated with lower burnout and intentions to leave and greater job satisfaction, although the research was observational rather than an intervention trial (Norling & Chopik, 2020).

There is some evidence involving school staff beyond classroom teachers. For example, a study of 191 paraprofessionals working in general and special schools found associations among dimensions of social support, job stress, and burnout (Pyo, 2015). A recent scoping review of teacher–paraeducator relationships likewise suggests that positive collegial relationships may be relevant to job satisfaction and burnout, while emphasizing the limited intervention evidence (Stoffers et al., 2026).

Schools might therefore consider whether staff:

- have opportunities to develop relationships with colleagues;
- know whom they can approach for assistance;
- feel included in the professional community;
- have access to peers doing similar work;
- receive support following difficult events; and
- experience norms of mutual assistance rather than isolation.

This may be especially important for employees who work independently, move among several buildings, work different shifts, are the only person in a specialized role, or have limited opportunities to interact with colleagues who understand their work.

Do not make peer support responsible for problems the organization should solve

Strong relationships can make difficult work more manageable. They do not create staffing, eliminate unnecessary work, repair unsafe conditions, or replace professional mental-health care. Schools should also avoid creating an expectation that employees absorb one another's distress without appropriate boundaries or resources.

> **Connection is a resource. It should not become another responsibility staff are expected to carry.**

If staff need clinical mental-health treatment or individual strategies for managing stress and recovery, see Strategy 9: Support Individual Well-Being & Access to Care.

What schools have actually tried

One well-studied approach is to replace or supplement one-time professional development with ongoing, job-embedded coaching. Coaching models differ considerably, but often involve repeated cycles of observation, feedback, modeling, goal setting, reflection, and opportunities to practice. Kraft, Blazar, and Hogan (2018) synthesized 60 studies using causal research designs and found average effects of 0.49 standard deviations on instructional practice and 0.18 standard deviations on student achievement.

The results also illustrate why implementation matters. Coaching programs differed in focus, intensity, coach preparation, and scale, and much of the evidence came from literacy coaching with prekindergarten and elementary teachers.

Bottom Line: When staff need help developing complex skills, consider support that is ongoing and close to the work rather than relying exclusively on one-time training. Define what the coach or consultant is expected to help with, prepare the people providing support, protect time for the work, and assess whether employees actually find the support useful.

The same principle can be applied without assuming that every employee needs an instructional coach. Different roles may need different forms of job-embedded expertise and consultation.

Evidence note: The coaching literature provides relatively strong evidence that coaching can improve teacher practice, and some evidence that it can improve student outcomes. It does not provide equally strong evidence that coaching improves teacher well-being or reduces burnout. Most of the causal literature also concerns teachers, particularly elementary teachers.

More support does not automatically produce better outcomes

A large federal randomized evaluation tested comprehensive induction programs for beginning teachers. The programs included full-time mentors, regular mentoring, professional development, and opportunities to observe experienced teachers. The study included 1,009 beginning teachers in 418 schools across 17 districts (Glazerman et al., 2010).

Teachers assigned to comprehensive induction did receive more support. But after three years, researchers found **no significant differences in teacher retention**, and there were no effects on measured classroom practice during the first year. Some later student-achievement effects appeared among teachers offered two years of induction, but these did not establish effects on teacher well-being.

Bottom line: Do not evaluate professional support by asking only whether a program exists or whether staff participated. Ask whether employees received the kind of support they needed, whether they used it, whether it improved the problem it was intended to address, and whether the intended staff outcomes changed.

What does the evidence tell us? The evidence supports a clear distinction between the importance of professional and relational support as workplace resources and the effectiveness of particular support interventions. The first evidence base is stronger. Collegial support and collaboration appear repeatedly in the teacher well-being literature and are associated with lower stress and burnout and with greater well-being, job satisfaction, and engagement (Moens et al., 2026).

What does the evidence tell us?

Evidence for particular strategies varies. Coaching has strong causal evidence for improving teacher practice and some student outcomes, but much less direct evidence for staff well-being (Kraft et al., 2018). Mentoring has a credible professional and relational rationale and a literature specifically connecting it with early-career teacher well-being, but rigorous evidence does not show that comprehensive induction consistently improves retention (Glazerman et al., 2010; Squires, 2019). Collaborative professional communities are associated with job satisfaction and professional learning, but much of this evidence is observational and effects depend heavily on how collaboration is structured. The evidence remains substantially thinner for most school employees other than teachers.

CORE STRATEGY	EVIDENCE CLASSIFICATION	WHAT THE EVIDENCE SUGGESTS	LIMITATIONS/ CAUTIONS
Provide mentoring and role-transition support	Promising / evidence varies	Mentoring can provide early-career teachers with professional, relational, and emotional support, and the literature identifies promising connections with well-being (Squires, 2019).	Mentoring and induction programs vary considerably. A large randomized evaluation of comprehensive induction found increased support but no effects on teacher retention over three years or first-year classroom practice (Glazerman et al., 2010). National Center for Education Statistics Evidence for nonteacher school staff is sparse.
Provide coaching, consultation, and access to expertise	Strong evidence for some professional outcomes; well-being evidence limited	A meta-analysis of 60 causal studies found positive effects of teacher coaching on instructional practice and student achievement (Kraft et al., 2018).	Outcomes were primarily professional practice and student achievement—not staff stress, burnout, or well-being. Much of the evidence concerns literacy coaching with pre-K and elementary teachers.
Strengthen collegial collaboration and shared problem solving	Strong evidence that the factor matters; strategy evidence varies	A systematic review found collaboration examined in 68 teacher well-being studies and associated across the literature with lower stress and burnout and greater well-being, job satisfaction, and engagement (Moens et al., 2026). Large cross-national evidence also links professional learning communities with teacher job satisfaction.	Much of the evidence is observational. Collaboration varies greatly in quality and purpose; effective teacher communities depend on conditions including trust, respect, group dynamics, and leadership (Vangrieken et al., 2017).

CORE STRATEGY	EVIDENCE CLASSIFICATION	WHAT THE EVIDENCE SUGGESTS	LIMITATIONS/ CAUTIONS
Strengthen belonging and mutual support	Strong rationale; intervention evidence limited	Coworker support is associated with lower burnout and intentions to leave and greater job satisfaction in broader workforce research. School-specific evidence also identifies collegial support as a teacher job resource, with some supportive evidence among paraprofessionals (Moens et al., 2026; Pyo, 2015).	Much of the evidence is correlational. There is limited direct evidence that a particular school-based peer-support or belonging intervention improves staff well-being. Support from coworkers should not substitute for organizational changes or professional mental-health care.

Bottom line: Staff should not have to manage difficult work alone. Professional and relational support can give employees access to expertise, feedback, practical assistance, shared problem solving, and connection. The evidence is strongest that these resources matter; it is less consistent about which particular support structures will produce better staff well-being.

Rather than beginning with "we should start a mentoring program" or "we need a professional learning community," begin with the need: What are staff encountering that they should not have to manage alone? What kind of help would make a meaningful difference? Who can provide it? How and when can staff access it? Then assess whether the support actually helps.

If employees need action from a supervisor or leader, return to Strategy 3: Strengthen Leadership, Supervision, & Organizational Support. If staff have expertise and collegial support but lack reasonable influence over their work, return to Strategy 4: Give Staff Meaningful Roles in Solving Workplace Problems. If staff primarily need stronger systems for responding to student academic, behavioral, or mental-health needs, continue to Strategy 6. If they primarily need support managing their own stress, recovery, or mental-health needs, see Strategy 9.

Strategy 6: Build systems that help staff meet student needs

Student needs are part of the work of schools. Meeting those needs can also become a significant source of staff stress when employees are expected to respond to academic, behavioral, physical, social-emotional, or mental-health needs without adequate time, training, resources, specialist support, or organizational systems.

Challenging student behavior is particularly important. Staff may be responsible for maintaining a safe and productive learning environment while responding to disruption, aggression, withdrawal, crisis, conflict, or other complex behavior. When effective supports are unavailable—or when employees do not know how to access them—individual staff may be left trying to solve problems that exceed their role, authority, or expertise.

The evidence supports treating this as a staff well-being issue, although most of the research concerns teachers. In a systematic review of 366 studies of teacher well-being, Moens et al. (2026) identified student-related challenges—including disruptive behavior, discipline problems, low student motivation, and aggression—as recurring job demands.



Across the literature, these demands were associated with greater stress and burnout and lower well-being (Moens et al., 2026). A separate systematic review of 55 studies found that more positive teacher–student relationships were associated with better middle- and secondary-school teacher well-being, while conflictual relationships were associated with stress, burnout, and other negative outcomes (Lai et al., 2026).

But the solution is not simply to help individual employees become better at managing difficult situations.

Staff capacity and system capacity are different things

An employee may need additional knowledge or skills. But the student may also need more intensive support. A classroom may need additional staffing. Staff may need access to consultation. A behavior plan may need to change. A referral process may be too cumbersome. Schoolwide expectations may be inconsistent. Specialized personnel may have caseloads that make timely assistance impossible.

A staff well-being strategy should therefore ask not only: "How can this employee respond more effectively?"

but also: "What system needs to be in place so that employees are not expected to meet complex student needs alone?"

Start by identifying where the system is breaking down

When staff say that student needs are contributing to stress, avoid jumping immediately to a particular program. Instead, ask what is making those needs difficult to address.

For example:

- Are staff encountering needs they do not feel prepared to address?
- Do they know where to seek consultation or assistance?
- Is help available early, or only after a situation becomes a crisis?
- Are referral processes clear and manageable?
- Do specialized staff have enough capacity to respond?
- Are classroom staff routinely expected to provide services beyond their roles or expertise?

- Are expectations and responses reasonably consistent across classrooms and settings?
- Do staff receive timely help during serious behavioral incidents?
- Do recurring problems lead to additional assessment and support—or simply repeated referrals and consequences?
- Are students and families able to access needed school and community services?
- Are some staff groups carrying a disproportionate share of the responsibility?

The answer may point toward a skill gap. But it may instead point toward staffing, coordination, access, role clarity, referral processes, administrative response, or the design of the student-support system itself.

Do not use training to solve a capacity problem.

Four ways to build systems that help staff meet student needs

Make multidisciplinary student supports accessible

No single employee can hold all of the expertise needed to address academic difficulties, disability-related needs, physical health, mental health, behavior, family circumstances, housing or food insecurity, and the many other factors that can affect students.

Multidisciplinary systems allow responsibility to be shared more appropriately. Depending on the setting, those systems may bring together counselors, school psychologists, social workers, nurses, behavior specialists, special educators, paraprofessionals, administrators, teachers, and community-based health or social-service providers.

But having these people on an organizational chart is not enough.

Focus on access, not just availability

Ask: When a staff member becomes concerned about a student tomorrow morning, do they know what to do next?

A useful support system should make it reasonably easy for staff to:

- identify where to bring a concern;
- consult with someone before a problem reaches crisis level;
- refer a student without an unnecessarily burdensome process;
- know what happens after a referral;
- obtain additional help when initial strategies are insufficient;
- coordinate support when several people or systems are involved; and
- receive feedback about what they should do next.

This may require examining referral pathways, team structures, consultation processes, response times, specialist caseloads, and communication—not simply whether a school technically employs specialized personnel.

Bring expertise to staff as well as sending students to specialists

Specialized support does not always require transferring responsibility for a student to someone else. Consultation can help classroom and other staff understand a student's needs, select appropriate responses, and determine when more intensive intervention is needed.

Models such as school mental-health consultation explicitly use mental-health professionals to work with educators around students' behavioral and mental-health needs. For example, the BRIDGE model combines consultation and coaching by school mental-health professionals with classroom observation and targeted strategies for students with behavioral-health challenges (Capella et al., 2012).

This overlaps intentionally with Strategy 5. The distinction is the source of the problem: Strategy 5 addresses access to professional and relational support generally; Strategy 6 applies consultation and expertise specifically when student needs are exceeding the support system available to staff.

Build coherent, tiered systems for prevention and response

When each classroom or employee must independently figure out how to respond to recurring student needs, staff repeatedly reinvent solutions and students may receive inconsistent responses. Schoolwide, tiered systems can create a more coherent structure.

Depending on the problem, this might include:

- universal approaches that establish supportive environments and common expectations;
- early identification and targeted supports for students needing more assistance;
- increasingly individualized intervention for students with intensive needs;
- clear procedures for moving between levels of support;
- data that help teams determine whether supports are working; and
- coordination among behavioral, academic, social-emotional, mental-health, and other systems.

Frameworks such as Multi-Tiered Systems of Support (MTSS), Positive Behavioral Interventions and Supports (PBIS), and comprehensive school mental-health systems use somewhat different structures and terminology, but share an important principle: individual staff should not be the entire intervention system.

Use prevention to reduce repeated crisis response

A coherent system does more than tell staff what to do after something has gone wrong. It seeks to reduce the frequency and intensity of problems that require individual staff response. There is substantial evidence that classroom-management and behavioral approaches can improve student behavior. A systematic review of 12 studies found that universal classroom-management programs significantly reduced disruptive and aggressive classroom behavior (Oliver et al., 2011).

Schoolwide PBIS similarly emphasizes prevention, explicit instruction of expected behavior, systematic responses, data-based decision making, and increasingly intensive supports for students who need them. The national Center on PBIS summarizes evidence linking schoolwide implementation with reductions in office discipline referrals and suspensions and improvements in several student and school outcomes; some studies also report teacher outcomes such as perceived efficacy, organizational health, climate, and safety.

These findings provide good reasons to strengthen behavioral systems. They do **not**, by themselves, establish that implementing PBIS, MTSS, or another framework will reduce staff burnout.

> **An evidence-based student intervention is not automatically an evidence-based staff well-being intervention.**

Give staff the knowledge and skills they need—without making them responsible for everything

Sometimes the system is reasonably strong, but staff do not yet have the knowledge or skills needed to use it effectively.

Training and professional learning may be appropriate when employees need help with areas such as:

- understanding behavior and its function;
- preventive classroom-management practices;
- de-escalation and responding safely to escalating behavior;
- recognizing signs that a student may need additional mental-health support;
- understanding referral procedures;
- implementing an intervention or behavior-support plan;
- building positive relationships with students; or
- knowing the boundaries of their own role.

There is evidence that effective classroom-management practices can reduce student problem behavior (Oliver et al., 2011), and teacher classroom-management self-efficacy is associated with classroom climate, student misbehavior, teacher stress, job satisfaction, and burnout (Duan et al., 2024).

Positive teacher–student relationships may also be an important resource. Lai et al. (2026) found positive relationships associated with multiple dimensions of teacher well-being among middle- and secondary-school teachers, while negative or conflictual relationships were associated with poorer outcomes. The authors caution, however, that the literature is heterogeneous and much of it was not designed to establish causal effects.

Training should connect to a functioning system. Training staff to recognize a mental-health concern is of limited value if no timely mental-health support is available. Teaching de-escalation does not resolve repeated dangerous situations if staffing and administrative response are inadequate. Classroom-management training cannot substitute for an appropriate individualized intervention when a student's needs require one.

> **Build skill where skill is the problem. Build capacity where capacity is the problem. Often, schools need both.**

Make escalation and crisis response reliable

Staff need to know that when a situation exceeds what they can reasonably manage, **help will come**. This is especially important when staff face aggression, threats, serious behavioral escalation, acute mental-health concerns, or other situations involving safety.

A reliable response system should make clear:

- what staff are expected to manage within their role;
- when additional help should be requested;
- how to request it;
- who responds;
- what happens if the first response is insufficient;
- how responsibilities are handled during and after the incident;
- how affected employees and students are supported afterward; and
- how recurring incidents lead to changes in support rather than simply repeated crisis response.

This is partly a student-support issue and partly an organizational-support issue. If administrators routinely fail to respond when employees request assistance, Strategy 3 may also be relevant.

Learn from recurring incidents

Repeated crises should generate questions about the system.

If the same student repeatedly reaches crisis, does the support plan need to change? If similar incidents occur across classrooms, are universal or targeted supports inadequate? If staff repeatedly wait too long for assistance, is the response process or staffing model the problem? If a small number of employees absorb most difficult situations, is responsibility being distributed appropriately?

The purpose is not to assign blame after an incident. It is to identify whether the organization can reduce the likelihood that the same preventable problem recurs.

What schools have actually tried

Schools implementing schoolwide PBIS establish common behavioral expectations, explicitly teach expected behavior, use consistent systems for acknowledging and responding to behavior, collect data about patterns and outcomes, and provide increasingly intensive supports for students whose needs are not met through universal approaches.

The approach has been implemented widely enough to provide a substantial evidence base. Research summarized by the Center on PBIS links schoolwide PBIS with reductions in discipline referrals and suspensions and improvements in school climate, safety, and several student outcomes. Some studies have also identified improvements in teacher perceptions such as efficacy and organizational health.

What schools can take from this. The transferable lesson is not necessarily "adopt PBIS." It is to move away from a system in which each employee must independently decide what to do when recurring student needs arise.

Schools can ask:

- Do we have a common preventive approach?
- Are expectations reasonably consistent?
- Can staff obtain help before problems become crises?
- What happens when universal supports are not enough?
- Is there a clear pathway to more intensive support?
- Do we use recurring patterns to improve the system?

Evidence note. PBIS and other tiered approaches have considerably stronger evidence for student behavioral and school outcomes than for staff well-being. Some studies report promising teacher outcomes, but staff stress and burnout have not been the primary outcomes in much of this research. Implementation also creates work. Training, data collection, meetings, new routines, and fidelity requirements can become additional demands if adequate time and implementation support are not provided.

A student-support strategy can also create staff burden

Schools sometimes respond to increasing student needs by adding programs for staff to implement. The program may be worthwhile. But it still requires staff time, attention, learning, coordination, and implementation.

A 2026 systematic review of **19 studies** examining teachers' implementation of universal school-based mental-health interventions found that implementation was influenced by factors

at the teacher, school, program, and broader-system levels. Training and implementation support were important, and the review identified staff perceptions, program characteristics, and school conditions as factors affecting implementation quality (Mason et al., 2026).

This creates an important test: Is the student-support strategy reducing a demand on staff, giving them better tools and assistance—or simply adding another responsibility?

Before implementing a new behavioral, social-emotional, or mental-health approach, consider:

- How much staff time will implementation require?
- What training and ongoing support are needed?
- Who is responsible for delivering the intervention?
- Does that responsibility fit the person's role and expertise?
- What existing work will be reduced or changed?
- Can specialized staff provide adequate consultation?
- Are there realistic resources for implementation?
- What will happen if student needs exceed the intervention?
- How will you know whether the approach is making staff work more manageable—or less?

What does the evidence tell us?

There is strong evidence that student-related challenges matter for teacher well-being. Disruptive behavior, discipline problems, difficult teacher–student relationships, and related student demands are consistently associated with teacher stress, burnout, and poorer well-being (Lai et al., 2026; Moens et al., 2026).

There is also substantial intervention evidence showing that schools can improve some of the student conditions producing those demands. Classroom-management interventions can reduce disruptive and aggressive student behavior, and schoolwide behavioral systems such as PBIS have evidence for several behavioral and school outcomes (Oliver et al., 2011).

The evidence chain becomes weaker when the outcome changes from student functioning to staff well-being. A program that improves student behavior may plausibly reduce one source of staff strain, but that effect should be measured rather than assumed. Likewise, student mental-health interventions may help students while simultaneously adding implementation demands

for staff. Recent implementation research reinforces the importance of examining training, support, fit, resources, and school conditions when teachers are expected to deliver mental-health interventions (Mason et al., 2026).

The strongest conclusion is therefore not that schools should adopt a particular student-support program to improve staff well-being. It is that schools should examine whether the systems surrounding student needs allow staff to respond effectively without being left individually responsible for problems that require additional expertise, capacity, or organizational response.

CORE STRATEGY	EVIDENCE CLASSIFICATION	WHAT THE EVIDENCE SUGGESTS	LIMITATIONS/ CAUTIONS
Make multidisciplinary student supports accessible	Strong rationale; direct staff-well-being evidence limited	Complex student needs frequently require expertise beyond any one employee's role. Consultation and multidisciplinary approaches provide mechanisms for sharing expertise and responsibility rather than leaving individual staff to manage complex needs alone.	Evidence for multidisciplinary and mental-health systems is considerably stronger for student access, implementation, and student outcomes than for staff stress or burnout. Benefits depend on actual accessibility, staffing, caseloads, coordination, and response time.
Build coherent, tiered behavioral, social-emotional, and mental-health supports	Strong evidence for some student outcomes; staff-well-being evidence emerging	Classroom-management interventions can reduce disruptive and aggressive student behavior, and schoolwide tiered behavioral approaches have evidence for behavioral, climate, and school outcomes (Oliver et al., 2011). Some PBIS research also reports favorable teacher perceptions.	Improved student outcomes do not establish improved staff well-being. Frameworks and implementation quality vary substantially, and implementation itself can create additional staff demands.
Build staff knowledge and skills for	Strong evidence for some practice and student	Effective classroom-management practices can reduce student problem behavior, while classroom-	Training cannot compensate for inadequate staffing, unavailable specialized

CORE STRATEGY	EVIDENCE CLASSIFICA-TION	WHAT THE EVIDENCE SUGGESTS	LIMITATIONS/ CAUTIONS
responding to student needs	outcomes; well-being evidence varies	management self-efficacy is associated with teacher stress, burnout, job satisfaction, and classroom conditions (Oliver et al., 2011; Duan et al., 2024).	services, unclear roles, or weak response systems. Associations involving self-efficacy do not establish that training will improve well-being.
Make escalation and crisis response reliable	Strong organizational rationale; direct intervention evidence limited	Student behavior, aggression, and difficult teacher–student interactions are documented teacher job demands associated with stress and burnout (Lai et al., 2026; Moens et al., 2026). Reliable escalation and response systems provide a credible mechanism for preventing individual employees from carrying needs beyond their role or capacity.	Direct research testing crisis-response systems as staff well-being interventions is limited. Schools should assess response time, perceived safety, recurring incidents, burden distribution, and staff experience rather than assuming a protocol is effective because it exists.

Bottom line: Staff should have the skills to respond effectively to student needs—but they should not be expected to function as the entire support system. When student needs contribute to staff strain, determine where the difficulty lies. Staff may need knowledge or skills. Students may need more intensive intervention. Specialists may need greater capacity. Referral pathways may need to become easier to use. Schoolwide practices may need greater consistency. Crisis response may need to become more reliable. Often, several parts of the system need to change together.

The goal is not to shield staff from students with complex needs. It is to build a system in which responsibility, expertise, and support match the complexity of those needs.

If the underlying problem is insufficient staffing or unmanageable specialist caseloads, return to Strategy 2: Strengthen Staffing & Capacity. If staff primarily need consultation, coaching, mentoring, or access to expertise, see Strategy 5: Strengthen Professional & Relational Support. If leaders fail to respond when staff request help or recurring organizational problems remain unresolved, see Strategy 3: Strengthen Leadership, Supervision, & Organizational Support. If a new student-support initiative is itself creating workload or change fatigue, continue to Strategy 7: Manage Organizational Change & Competing Demands.

Strategy 7: Manage organizational change & competing demands

Schools and districts are continually changing. New student needs emerge. Laws and policies change. Curricula and technology evolve. Schools adopt new instructional approaches, behavioral supports, data systems, safety procedures, professional-learning priorities, and improvement initiatives.

Change is not inherently harmful. Many changes are necessary, and some can substantially improve the work of staff. The problem arises when new expectations are repeatedly added without considering the demands already in place.

A new initiative may be worthwhile on its own. So may a new assessment, meeting, reporting requirement, communication procedure, training program, or student-support practice. But employees experience the **combined demand, not each initiative separately.**

Over time, individually reasonable expectations can accumulate into an unreasonable whole. The question is not only "Is this new work worthwhile?" It is also "What will it take to do this well—and what else are staff already being asked to do?"



Organizational change can contribute to stress when priorities compete, implementation occurs too quickly, staff do not understand what is expected, resources do not match expectations, old work continues alongside new work, or initiatives are introduced and abandoned so frequently that employees become skeptical of the next one.

Schools can reduce these demands by treating organizational capacity as finite. Adding a priority requires decisions about time, attention, staffing, resources—and sometimes what will receive less emphasis.

Four ways that schools can manage organizational change & competing demands

Prioritize and reduce competing demands

Start by looking at the whole change environment

A common mistake is to evaluate each initiative separately. A new literacy program may be reasonable. So may a new student-data system. A revised attendance process, additional family communication, a new behavioral-health initiative, required professional development, and a new documentation process may each have a legitimate purpose.

But that is not how staff experience them. Staff experience the total set of expectations competing for the same hours, attention, and organizational resources.

Periodically inventory major initiatives, programs, practices, meetings, reporting requirements, and other recurring expectations. For each, ask:

- What problem is this intended to solve?
- Who is expected to do what?
- How much staff time and attention does it require?
- Who experiences the burden?
- Is it required, locally chosen, or simply something we have continued doing?
- Does it overlap with another initiative or process?
- Is it producing enough value to justify the effort?
- What would happen if we simplified, paused, combined, or stopped it?

The purpose is not to eliminate change. It is to make priorities visible and create space for the work that matters most.

Make subtraction a normal part of improvement

Schools often have processes for approving new work but few processes for ending old work. As a result, activities can persist because they have always been done, because someone once requested them, or because no one has explicitly decided to stop.

When adding something substantial, ask: What will make room for this?

Sometimes the answer will be additional staffing or resources. Sometimes another activity can be reduced or combined. Sometimes the new work should be delayed. And sometimes the answer will be that the organization does not currently have the capacity to take it on well.

Explicitly identifying these tradeoffs is different from simply telling staff to "prioritize." If everything remains required, staff have not actually been given a priority.

TOOL: Initiative & Activity Inventory

Create a simple inventory with columns such as:

- Initiative/activity
- Purpose
- Staff affected
- What staff must do
- Time/resources required
- Required or discretionary?
- Evidence of value
- Overlap with other work
- Recommendation: Continue / Improve / Combine / Pause / Stop

Do not limit the inventory to programs formally labeled as initiatives. Include recurring meetings, committees, documentation, surveys, data-entry requirements, communication expectations, special events, and other activities that consume meaningful staff capacity.

Look at how demands are distributed across roles. A change that appears manageable from a district or administrative perspective may create substantial additional work for office staff, paraprofessionals, technology staff, custodians, transportation staff, student-support staff, or other employees whose workload is less visible in formal planning.

Assess fit and capacity before adding something new

Before committing to a new program, practice, policy, or procedure, examine both the change itself and the setting in which it will be implemented. Implementation frameworks consistently emphasize factors such as fit, readiness, available resources, leadership support, staff knowledge and skills, and organizational context. Effective implementation is a process rather than a one-time decision or training event.

Ask:

ISSUE	QUESTIONS
Does it fit?	• Does this address an identified need? • Does it align with current priorities? • Does it complement—or compete with—existing work? • Are staff likely to see the purpose and relevance?
Can we support it?	• What new tasks will it require? • How much time will those tasks take? • Who will carry them out? • What training, coaching, technology, materials, coverage, or coordination will be needed? • What existing work will be affected?
Is this the right time?	• What else is being implemented? • Are there predictable periods when capacity will be especially constrained? • Would sequencing this work differently make successful implementation more likely?

A technically strong intervention can still become a source of frustration if an organization does not have the capacity to implement it.

Distinguish the burden of the change from the burden of implementation

These are related but different. A **change itself** may increase or decrease ongoing workload. For example, eliminating an unnecessary reporting requirement could reduce work, while adding a new documentation requirement could increase it. **Implementing the change** also creates temporary demands: training, planning, learning new routines, entering data differently, troubleshooting technology, communicating with families, revising schedules, or coordinating across staff.

> **A strategy intended to improve working conditions can therefore make things harder before it makes them better.**

That does not necessarily mean the strategy should be abandoned. It means the implementation burden should be anticipated rather than treated as invisible work.

TOOL: Implementation Burden Check

Before launching a substantial change identify:

- **New work:** What will staff have to start doing?
- **Learning:** What will staff need to learn or practice?
- **Coordination:** What additional meetings, communication, or cross-role coordination will be required?
- **Transition costs:** Will staff temporarily need to maintain old and new systems at the same time?
- **Uneven burden:** Which roles will absorb the most additional work?
- **Resources:** What time, staffing, technology, materials, training, or coaching will be needed?
- **Subtraction:** What can stop, shrink, wait, or be combined to create capacity?

Provide the support required to make change manageable

A common implementation problem is assuming that communicating a decision is the same as supporting people to carry it out. Staff may be told that a new practice begins Monday, receive a presentation or manual, and then be expected to incorporate it into already-full workdays.

Implementation research suggests a more substantial process. Staff may need clear expectations, opportunities to practice, coaching or consultation, data and feedback, leadership problem-solving, and organizational changes that make the new practice feasible. The National Implementation Research Network, for example, identifies competency supports

such as training and coaching as well as organizational and leadership supports. The Education Endowment Foundation similarly describes implementation as a staged process of exploring, preparing, delivering, and sustaining change.

Make expectations clear

Staff should be able to answer:

- What are we changing?
- Why are we changing it?
- What specifically am I expected to do differently?
- What is not changing?
- What is essential, and where is adaptation allowed?
- When will this happen?
- Where do I go when something does not work?

Ambiguity itself creates work. When expectations are unclear, staff spend time interpreting requirements, developing workarounds, checking with colleagues, or doing more than is actually required because they are unsure what is sufficient.

Match support to the work

Different changes require different supports. A new instructional practice may require modeling, practice, feedback, and coaching. A new data system may require technical assistance, protected time for setup, and streamlined expectations during the transition. A new student-support process may require clear roles, referral procedures, coordination time, and access to people who can respond when needs exceed a staff member's role. A change affecting transportation, food service, facilities, office operations, or other school functions may require different schedules, staffing, communication channels, or training than changes primarily affecting classroom instruction.

Ask the people doing the work what would make implementation feasible. Their knowledge of day-to-day conditions can reveal barriers that are difficult to see from farther away.

Protect time for change

Learning and implementing something new takes time. If the organization expects staff to learn a new practice while maintaining every previous responsibility at the same level,

implementation work often shifts into planning periods, evenings, weekends, or hurried moments during the workday. Whenever possible, build implementation work into existing paid time rather than assuming staff will absorb it individually.

Monitor burden as well as implementation—and adapt when needed

Implementation monitoring often asks: Are people doing what we intended? That matters, but it is only part of the picture. Also ask: What is it taking for people to do it?

A practice can technically be implemented while creating substantial hidden costs—lost planning time, duplicated documentation, additional meetings, after-hours work, interrupted workflows, role confusion, or new demands on staff who were not included in the original planning.

TOOL: Brief Burden Check

Periodically ask staff:

- What parts of this change are working well?
- What is harder or taking more time than expected?
- Is any work being duplicated?
- What other responsibilities are being displaced?
- Are some staff roles carrying more of the burden than others?
- What could be simplified without losing the essential purpose?
- What support would make this easier to carry out?
- Is anything no longer worth continuing?

Use multiple ways to gather this information. Staff who have less positional power, less schedule flexibility, or fewer opportunities to attend meetings may experience implementation differently and may be less likely to volunteer concerns publicly.

Adapt without losing the purpose

Not every implementation problem means the underlying strategy is wrong. Sometimes the goal remains important but the process needs to change.

For example:

- A new documentation requirement may contain useful information but have too many fields.
- A team meeting may be important but occur too frequently.
- A student-support protocol may be valuable but require clearer role boundaries.
- A professional-learning initiative may be useful but need more practice and less new content.
- A communication expectation may serve families but need clearer limits around response times.

Distinguish between the **core purpose or essential components** and the procedures that can reasonably be adapted.

Be willing to stop

Organizations can become invested in initiatives because substantial time, money, or reputation has already been attached to them. But continuation should not be automatic. If a strategy is not producing meaningful benefit, creates disproportionate burden, duplicates other work, no longer addresses an important need, or cannot realistically be supported, stopping may be an appropriate improvement decision.

Ending low-value work can also build credibility. Staff are more likely to believe that leaders are listening when feedback sometimes results in something actually changing—or disappearing.

What schools have actually tried

Research on school improvement provides useful examples of what it looks like when schools treat implementation as organizational work rather than simply introducing another program.

Success for All (SFA) is a comprehensive school-reform model focused primarily on literacy. It is useful here not because schools should necessarily adopt SFA, but because researchers have studied what happened when schools attempted to implement a substantial change over time. Implementation of SFA involved much more than providing schools with instructional materials. Schools used facilitators, initial and ongoing professional development, coaching, classroom observation and feedback, data review, and leadership and organizational supports. Research examining implementation found considerable variation across schools and identified factors

such as leadership, organizational conditions, and staff development as important influences on implementation (Borman & Hewes, 2002; Datnow & Castellano, 2000).

Research also illustrates why implementation success and staff experience should be examined separately. In qualitative research with teachers implementing SFA, teachers described benefits they perceived in the program while also identifying concerns about autonomy, flexibility, and opportunities to use their own professional judgment (Datnow & Castellano, 2000).

What this illustrates: Even a well-developed, evidence-informed initiative creates demands on an organization. Schools need time, leadership, professional learning, coaching, coordination, and other infrastructure to implement change well. They also need to examine how the change is experienced by the people expected to carry it out.

Research on comprehensive school reform has also documented what happens when educators are asked to respond to multiple improvement efforts simultaneously. Rather than experiencing each initiative independently, teachers and school leaders must interpret how different policies, programs, and expectations fit together.

Honig and Hatch (2004) described coherence as something schools actively construct, rather than something that automatically exists because individual reforms are worthwhile. Schools and districts create coherence by deciding how external demands connect to local priorities, determining what receives attention, and sometimes deciding what not to pursue.

Similarly, Newmann et al. (2001) found that schools with stronger program coherence had coordinated curriculum, instruction, assessment, and professional development around a common framework rather than operating as collections of disconnected programs.

What this illustrates: Managing competing demands is not simply a matter of helping individual staff become better organized. Schools and districts can reduce fragmentation by clarifying priorities, aligning related work, and making deliberate choices about what they will—and will not—ask staff to implement.

What does the evidence tell us?

The evidence supporting this strategy comes primarily from research on educational change, implementation, organizational coherence, teacher working conditions, and change-related demands. A systematic review of 191 studies of mandated educational change identified organizational readiness, comprehensive planning, preparation for implementation, and capacity building among recurring conditions associated with successful school change (Aldridge & McLure, 2024). Implementation frameworks similarly emphasize that organizations

need to assess context and readiness, develop implementation supports, monitor progress, and adapt over time rather than treating implementation as a one-time event.

Research on school reform also demonstrates the importance of coherence. Schools do not experience reforms one at a time; they often must make sense of multiple policies, programs, and improvement priorities simultaneously. Studies suggest that schools are better positioned to implement improvement efforts when activities reinforce a common direction rather than competing for attention (Honig & Hatch, 2004; Newmann et al., 2001).

There is also evidence—primarily involving teachers—that organizational change can itself become a source of demand. Studies of educational reform describe experiences including increased workload, competing expectations, reduced autonomy, uncertainty, and change fatigue. However, findings vary across contexts, and change itself should not automatically be treated as harmful. Poorly designed, insufficiently supported, or repeatedly shifting change appears more concerning than change per se.

The evidence becomes thinner when we ask a more specific question: Does deliberately reducing initiative load improve school staff well-being?

There is a strong organizational and implementation rationale for auditing initiatives, improving sequencing, reducing duplication, and stopping low-value work. But relatively little school-based intervention research has directly tested whether these particular strategies improve staff well-being outcomes.

That distinction is important. The evidence supports taking cumulative demands, coherence, organizational capacity, and implementation conditions seriously. The specific tools suggested in this section are practical applications of those principles rather than individually validated staff-well-being interventions.

CORE STRATEGY	EVIDENCE CLASSIFICATION	WHAT THE EVIDENCE SUGGESTS	LIMITATIONS/ CAUTIONS
Reduce competing initiatives and improve coherence	Strong rationale; direct staff-well-being evidence limited	School-improvement research suggests that coherence matters when schools are managing multiple external demands. Schools are better positioned to carry out improvement efforts when programs, policies, professional	Evidence is stronger for organizational coherence and implementation than for staff well-being. There is limited direct intervention evidence showing that reducing the number of initiatives

CORE STRATEGY	EVIDENCE CLASSIFICA-TION	WHAT THE EVIDENCE SUGGESTS	LIMITATIONS/ CAUTIONS
		development, and other activities reinforce common priorities rather than competing for attention (Honig & Hatch, 2004; Newmann et al., 2001).	improves stress or burnout.
Assess fit, capacity, and competing demands before adding new work	Strong implementation evidence; well-being evidence indirect	Implementation research consistently identifies fit, readiness, available resources, leadership support, organizational capacity, and compatibility with existing work as important influences on successful implementation. Assessing these conditions before adding substantial new work can identify foreseeable barriers and resource needs.	Evidence that these conditions influence implementation is much stronger than evidence that conducting a formal capacity or burden assessment improves staff well-being. Assessment is useful only if findings influence decisions about what, when, and how to implement.
Sequence change and create capacity for new work	Strong rationale; strategy evidence varies	Research on organizational capacity and coherence supports considering how new expectations interact with existing priorities, resources, and implementation demands. Deliberate sequencing, pacing, and creating space for new work are therefore credible strategies for reducing competing demands (Honig & Hatch, 2004; Newmann et al., 2001).	There is limited direct research comparing alternative approaches to sequencing or pacing school initiatives. Creating capacity may require genuinely reducing or delaying other work; simply extending timelines may not reduce total burden.
Provide adequate implementation supports	Strong for implementation; indirect for staff well-being	A substantial implementation literature supports the importance of training, coaching, facilitation,	Successful implementation is not the same as improved staff well-being. Training, coaching,

CORE STRATEGY	EVIDENCE CLASSIFICA-TION	WHAT THE EVIDENCE SUGGESTS	LIMITATIONS/ CAUTIONS
		leadership support, feedback, resources, and organizational problem-solving. Research on comprehensive school reforms such as Success for All illustrates that substantial change requires ongoing implementation infrastructure rather than adoption or one-time training alone (Borman & Hewes, 2002; Datnow & Castellano, 2000).	meetings, data collection, and other implementation supports can themselves add demands. Supports should make the work more feasible rather than simply adding another layer of activity.
Monitor burden and staff experience during change	Promising / emerging	Research on educational change shows that staff may experience reforms differently from how designers or leaders intend. Studies—primarily involving teachers—describe workload, uncertainty, reduced autonomy, competing expectations, and other demands during change. Monitoring staff experience provides a way to identify these effects while implementation is underway.	Evidence documents the potential burden of change more clearly than it demonstrates that burden-monitoring processes improve well-being. Research is predominantly teacher-focused, and monitoring without a mechanism for responding to findings may simply create additional work.
Simplify, adapt, pause, or stop low-value work	Promising / emerging	Deliberately removing duplicative, outdated, or low-value work is consistent with research on coherence, organizational capacity, and de-implementation. It provides a plausible mechanism for creating capacity rather than	Direct school-based intervention evidence is limited, particularly for staff well-being outcomes. Removing work from one group can also shift it to another. Schools should examine whether subtraction actually reduces total burden and

CORE STRATEGY	EVIDENCE CLASSIFICATION	WHAT THE EVIDENCE SUGGESTS	LIMITATIONS/ CAUTIONS
		continually adding new expectations.	whether essential functions are preserved.

Bottom line: Evidence is strong that organizational context, capacity, coherence, and implementation supports influence whether change can be carried out successfully. Evidence is much less developed for the more specific question of whether initiative-management strategies—such as sequencing changes, conducting burden reviews, or deliberately stopping work—improve staff well-being. These strategies therefore combine established implementation principles with promising organizational practices that should be tested and monitored locally.

Strategy 8: Improve employment, material & physical working conditions

Staff well-being is shaped not only by how work is organized and how people are treated, but also by the basic conditions under which people are employed and expected to work.

Compensation matters. So do benefits, job stability, predictable schedules, usable leave, adequate equipment, functioning technology, appropriate workspace, and safe and functional facilities.

These conditions may be particularly important when considering the full school workforce. Teachers, administrators, paraprofessionals, student-support professionals, office staff, custodial and facilities employees, food-service staff, transportation staff, substitutes, security staff, technology staff, and others may work in the same organization while experiencing very different wages, benefits, schedules, physical demands, and access to resources.

Material conditions may be particularly important when considering the full school workforce. A salaried teacher, hourly paraprofessional, bus driver, food-service worker, custodian, counselor, substitute, office employee, technology specialist, and administrator may work in the same



system while experiencing very different compensation, benefits, schedules, physical demands, job security, and access to resources.

The evidence base does not represent these groups equally. As elsewhere in this toolkit, much of the school-specific research focuses on teachers. That limitation is especially important here because many employees who are poorly represented in the research may experience distinctive economic, scheduling, and physical working conditions.

> **Some well-being problems are material problems. They require material solutions.**

Not every school or district controls every employment condition. Compensation may be governed by collective bargaining agreements, district policy, state funding, or other constraints. Facilities improvements may require substantial capital investment. Benefits may be determined districtwide rather than by an individual school.

That does not make these conditions irrelevant. It means teams should distinguish among what they can control, influence, advocate for, or document as a constraint.

Start by identifying the actual condition

"Improve working conditions" is too broad to guide action. Staff may be describing inadequate compensation, unpredictable hours, difficulty using earned leave, unreliable technology, unsafe equipment, excessive heat or noise, insufficient workspace, physical strain, or another material condition. These problems require different responses.

Before selecting a strategy, ask: What employment, material, or physical condition is interfering with staff members' ability to work safely, effectively, or sustainably?

Four ways to improve employment, material, and physical working conditions

Improve compensation, benefits, and economic security

Compensation is one of the clearest examples of a working condition with important workforce consequences. Research consistently connects teacher compensation with recruitment and retention. Financial incentives have also been tested directly. For example, a quasi-

experimental evaluation of Florida's Critical Teacher Shortage Program found that loan forgiveness reduced attrition among eligible middle- and high-school math and science teachers (Feng & Sass, 2018). A broader systematic review similarly found that financial incentives constitute much of the causal evidence on strategies for attracting and retaining teachers in hard-to-staff settings.

Keep the outcome distinction clear, however. Evidence that compensation improves recruitment or retention is not the same as evidence that it reduces stress or burnout.

Look beyond base salary

Economic security may be affected by:

- salary or hourly wages;
- number and predictability of paid hours;
- health-insurance costs and coverage;
- paid sick, family, and personal leave;
- retirement benefits;
- compensation for additional duties;
- overtime or uncompensated work;
- childcare or transportation costs;
- housing costs; and
- other expenses employees routinely absorb in order to do their jobs.

The relevant conditions will differ substantially across staff groups. Schools and districts might therefore consider reviewing compensation against comparable local employment, compensating substantial additional responsibilities, improving benefits where feasible, providing targeted financial incentives for hard-to-staff positions, or addressing other economic barriers identified locally.

Ask who is most affected

Average compensation can hide important differences. Lower-paid employees may be particularly affected by unstable hours, benefit eligibility thresholds, unpaid time, required travel, personal purchases for work, or additional responsibilities that carry no additional compensation.

An equity check should therefore ask: Which employees are least economically secure, and are people with the least financial flexibility being asked to absorb disproportionate costs?

Recognition and compensation should also remain distinct. Appreciation can be meaningful, but a thank-you, staff meal, or recognition program is not a substitute for adequate compensation.

Improve employment stability, scheduling, and access to leave

Compensation is only one part of employment quality. Employees may experience strain when schedules change with little notice, hours fluctuate, assignments move frequently, employment depends on short-term funding, or work arrangements provide little predictability.

Different school roles present different constraints. Some employees work split shifts, very early hours, multiple sites, variable schedules, or positions with insufficient hours for desired benefits. Others have relatively stable schedules but face expectations for substantial work outside paid or contracted time.

Consider:

- schedule predictability;
- number and consistency of paid hours;
- advance notice of changes;
- split shifts;
- movement among buildings or assignments;
- access to breaks;
- job stability;
- expectations outside paid work time; and
- reasonable employee input into schedules.

Make leave usable

A benefit can exist on paper without being readily usable. Employees may technically have paid leave but hesitate to use it because coverage is unavailable, preparing for an absence creates substantial additional work, coworkers will be left short-staffed, or organizational norms discourage absence.

Ask both: **What leave do employees have?**

And **Can they realistically use it when they need it?**

If inadequate coverage is the primary barrier, the underlying issue also belongs in Strategy 2: Ensure Adequate Staffing & Capacity.

Think about flexibility by role

Flexibility should not be defined only as the ability to work remotely or choose one's hours. Many school jobs require physical presence at specific times. For those roles, meaningful flexibility may mean adequate notice, greater schedule predictability, easier shift-swapping, employee input into assignments, reasonable leave practices, or greater stability.

Ask: What forms of predictability, stability, or reasonable flexibility are possible within this particular role?

Provide the materials, equipment, technology, and workspace people need to do their jobs

Doing difficult work becomes harder when the tools do not work. Teachers may need instructional materials and functioning classroom technology. Paraprofessionals may need access to information and materials required to support assigned students. Custodial and facilities employees need appropriate equipment, supplies, and protective equipment. Food-service staff need reliable equipment and appropriately designed work areas. Transportation employees need safe vehicles and communication systems. Office and technology staff need systems capable of handling the volume and complexity of their work.

When organizational resources are inadequate, employees often compensate through extra time, improvisation, personal spending, or physical effort.

Ask:

- What equipment or materials routinely fail, run out, or are unavailable?
- What do employees purchase themselves?
- Where does outdated or unreliable technology create unnecessary work?
- Are staff sharing resources that should reasonably be available when needed?
- What workarounds have become routine?

- Do employees have appropriate space to perform their work?

Workarounds can be useful diagnostic information. Personal spreadsheets, unofficial communication systems, equipment brought from home, repeated borrowing, and other informal solutions may reveal places where formal systems are not meeting the needs of the work.

Measure usable access—not simply whether a resource exists

A school may technically provide equipment, technology, or workspace that is unreliable, inappropriate for the task, inaccessible to some employees, or unavailable when needed.

The relevant question is not simply: **"**Do we provide it?"

Ask: "Can staff reliably use it to do the work they are expected to do?"

The teacher well-being literature provides support for considering material resources as part of the work environment, but direct intervention evidence linking improvements in specific resources to staff well-being remains limited. Moens et al. (2026), for example, identified physical and material resources among the job resources represented in the teacher well-being literature.

Improve physical working conditions and safety

Schools are learning environments for students. They are also workplaces for adults. Physical conditions may affect comfort, health, concentration, physical strain, safety, and the ease with which employees perform their jobs.

Relevant conditions can include:

- temperature and ventilation;
- indoor air quality;
- noise and acoustics;
- lighting;
- cleanliness and sanitation;
- ergonomics;
- accessibility;

- functioning and safe equipment;
- security and physical safety;
- appropriate workspace and storage;
- restrooms and drinking water; and
- space to take a genuine break.

The relevant exposures differ considerably by role. Teachers may be concerned about classroom temperature, noise, or configuration. Custodial and food-service staff may experience lifting, repetitive movement, heat, chemicals, slippery surfaces, or equipment hazards. Transportation staff may experience prolonged sitting, noise, weather exposure, and vehicle-related conditions. Office and technology staff may spend substantial time at workstations.

Consider the physical demands of the job

Some employees stand for long periods, lift or transfer students, move supplies or equipment, drive for extended periods, work outdoors, perform repetitive movements, or physically respond to student behavior.

Ask:

- Which jobs involve significant physical demands?
- Are equipment and staffing adequate to perform those tasks safely?
- Are employees appropriately trained?
- Are recurring injuries or near-misses being examined?
- Could equipment, schedules, processes, or environments be redesigned to reduce unnecessary strain?

Begin with the hazard

When staff report safety concerns, identify the hazard rather than focusing first on the employee's reaction to it. When a workplace condition is unsafe, helping employees cope with feeling unsafe is not an adequate primary response.

Schools and districts should have mechanisms for reporting concerns, responding promptly, communicating what was done, and examining recurring patterns. If the concern primarily

involves student aggression or inadequate behavioral-response systems, see Strategy 6: Build Systems That Help Staff Meet Student Needs.

Considerations across all four strategies

Look across staff roles

Do not assume that information collected from teachers describes other employees. Where published evidence is sparse, local staff experience becomes especially important. Seek information from employees working different jobs, schedules, buildings, and shifts—including people who may be less likely to participate in general staff meetings or surveys.

Distinguish what you control from what you can influence

- For each condition, identify whether the school or district can:
- CONTROL it directly;
- INFLUENCE it through negotiation, budgeting, partnership, or advocacy; or
- must currently treat it as a CONSTRAINT and plan around it.

"We cannot fix this locally" is different from "this does not belong in a staff well-being plan."

Avoid substituting perks for working conditions

Food, celebrations, casual dress days, gifts, wellness rooms, discounts, and other perks may be appreciated. They are not substitutes for adequate compensation, usable leave, safe working conditions, functioning equipment, manageable schedules, or appropriate facilities.

> **A perk can be valuable without being a solution to the problem you are trying to solve.**

What schools have actually tried

One of the clearest intervention literatures concerns targeted financial incentives for hard-to-staff positions and settings. Feng and Sass (2018) examined Florida's Critical Teacher Shortage Program using a difference-in-differences design. The program included loan-forgiveness incentives for teachers in designated shortage areas. Loan forgiveness reduced attrition among eligible middle- and high-school math and science teachers by approximately 10% and 9%, respectively.

Other quasi-experimental research has found retention effects from targeted financial incentives. A systematic review of strategies for hard-to-staff schools found that financial incentives accounted for most of the available experimental or quasi-experimental evidence and generally showed positive effects on at least some dimensions of teacher supply.

Bottom line. Material conditions can be changed, and changing them can affect workforce outcomes. If compensation is part of the problem, examine compensation. Do not assume that recognition, improved communication, or stress-management programming will produce the same result.

At the same time, define the outcome. A compensation strategy may improve recruitment or retention without reducing burnout. If workload, safety, leadership, or another condition is producing staff distress, compensation alone may not address it.

Evidence note: The causal evidence on financial incentives is stronger for **teacher** recruitment and retention than for staff well-being. It also overwhelmingly concerns teachers rather than the broader school workforce.

The lesson is therefore not "raise pay and well-being will improve." It is narrower: When compensation is the identified employment problem, compensation is a legitimate intervention target with evidence that it can affect important workforce outcomes.

What does the evidence tell us?

The evidence varies substantially across the conditions grouped in this strategy. Compensation has one of the clearer workforce evidence bases. Financial incentives can affect recruitment and retention, including in hard-to-staff positions. But evidence that compensation changes turnover does not establish that it reduces burnout (Evans & Acosta, 2023).

Evidence concerning schedules, stability, leave, materials, facilities, physical demands, and safety comes from several research traditions and varies by outcome and population. The recent systematic review of teacher well-being by Moens et al. (2026) supports considering employment conditions and physical and material resources as components of the work

environment, but does not establish that any single intervention in these areas will improve well-being.

School-specific evidence is also especially incomplete for many nonteacher employees. Local information—staff reports, turnover patterns, compensation comparisons, facilities assessments, injury or safety information where appropriate, equipment-repair patterns, absence data, benefit utilization, and exit interviews—may therefore reveal significant problems that the published well-being literature has barely studied.

CORE STRATEGY	EVIDENCE CLASSIFICATION	WHAT THE EVIDENCE SUGGESTS	LIMITATIONS/ CAUTIONS
Improve compensation, benefits, and economic security	Strong for some recruitment and retention outcomes; well-being evidence less direct	Financial incentives and compensation can influence teacher recruitment and retention, including in some hard-to-staff settings (Feng & Sass, 2018).	Strongest causal evidence concerns teachers and workforce outcomes rather than burnout or well-being. Evidence for benefits and other financial supports varies.
Improve employment stability, scheduling, and access to leave	Strong general workplace rationale; school-specific strategy evidence limited	Predictability, stability, work-life compatibility, and usable leave are important dimensions of employment quality and plausible targets when local assessment identifies them as sources of strain.	Direct school intervention evidence is limited, particularly across nonteacher roles. Employment arrangements vary substantially by job and bargaining context.
Provide adequate materials, equipment, technology, and workspace	Strong rationale; direct well-being evidence limited	Physical and material resources appear in the teacher well-being literature as workplace resources and can affect employees' ability to perform expected work (Moens et al., 2026).	Research often examines resource adequacy or working conditions rather than testing whether providing a particular resource reduces stress or burnout. Needs vary greatly by role.
Improve physical working conditions and safety	Strong occupational-health rationale; school-specific well-being evidence varies	Safe, accessible, functional environments are fundamental working conditions, and physical/material	Much of the relevant evidence comes from occupational health, facilities, ergonomics, and safety research

CORE STRATEGY	EVIDENCE CLASSIFICATION	WHAT THE EVIDENCE SUGGESTS	LIMITATIONS/ CAUTIONS
		conditions are represented in the teacher well-being literature.	rather than school staff well-being intervention trials. Exposures and solutions differ substantially by role.

Bottom line. Do not treat a material problem as a motivational or coping problem.

If staff identify compensation, benefits, schedules, stability, equipment, facilities, physical demands, or safety as sources of strain, investigate those conditions directly. Some changes may be relatively small and local: replacing unreliable equipment, creating appropriate workspace, improving a scheduling procedure, or making necessary supplies easier to obtain. Others may require collective bargaining, district budgeting, facilities planning, policy change, or long-term advocacy. The scale of the solution does not change the nature of the problem.

If staffing shortages are driving the concern, see Strategy 2: Ensure Adequate Staffing & Capacity. If the problem is excessive or inefficient work, see Strategy 1: Make Workload More Manageable. If employees need greater influence over schedules or work processes, see Strategy 4: Give Staff Meaningful Roles in Solving Workplace Problems. If physical-safety concerns primarily arise from student needs or inadequate response systems, see Strategy 6: Build Systems That Help Staff Meet Student Needs.

Strategy 9: Support individual well-being and access to care

Schools cannot eliminate all stress from work.

Working in schools can be demanding even when an organization is functioning well. Staff may encounter difficult student situations, emotionally intense work, periods of unusually high demand, personal challenges outside of work, illness, grief, caregiving responsibilities, or mental-health concerns that are not caused by the workplace.

Employees deserve access to resources that can help them manage stress, recover from demanding work, maintain their well-being, and obtain professional care when they need it.

Individual-level approaches can help. In a 2025 scoping review, Avola and colleagues identified 46 teacher well-being or burnout intervention studies involving 7,369 participants in 15 countries. Interventions included mindfulness and meditation, physical activity, therapy-based techniques, gratitude practices, professional development, and multicomponent approaches. Most focused primarily on individual well-being.



This evidence is important. It also needs to be interpreted carefully. The greater volume of research on individual interventions does not mean that individual factors are the most important causes of staff stress. Individual interventions are generally easier to define, standardize, and test than changes to workload, staffing, leadership, compensation, schedules, or organizational systems.

Helping people cope with a demand is different from reducing the demand. Individual supports have a legitimate role. They should be used for the purposes they can reasonably serve.

"Staff are stressed" does not identify an intervention.

Start by asking what kind of support staff need. Some employees may want skills for managing stress. Others may need greater opportunity to recover from demanding work. Some may need support after an unusually difficult event. Others may need confidential professional mental-health care. And some employees who appear to need stress management may actually need a workplace condition to change.

Ask:

- Is the stress primarily being generated by a modifiable workplace condition?
- Is some stress inherent in demanding work even under reasonable conditions?
- Are staff asking for skills or resources to help them cope?
- Are employees having difficulty recovering from work?
- Do staff need professional mental-health care?
- Are services technically available but difficult to access?

Individual and organizational strategies are not mutually exclusive. A school can reduce preventable workload **and** offer stress-management resources. It can improve crisis-response systems **and** provide support to staff affected by difficult events. The problem arises when individual support substitutes for organizational action.

Four ways to support individual well-being and access to care

Provide evidence-informed stress-management and well-being interventions

Schools commonly offer mindfulness, relaxation, resilience training, stress-management programs, exercise, gratitude activities, and other individual-focused approaches. These interventions do not all have the same evidence.

Recent reviews suggest that some structured individual interventions can improve teacher well-being or reduce stress and related symptoms, but interventions and outcomes vary considerably (Avola et al., 2025; Cann et al., 2024). Avola et al. found generally positive findings across several categories—including mindfulness and meditation, physical activity, therapy-based approaches, gratitude, and some multicomponent interventions—but also described a heterogeneous evidence base.

Distinguish a structured intervention from a general wellness activity

A program with a defined approach, trained facilitator, repeated sessions, opportunities for practice, and measured outcomes is different from a wellness newsletter or one-time presentation.

Before adopting an intervention, ask:

- What problem is it intended to address?
- What does participation actually involve?
- Has it been tested?
- What outcomes changed?
- Who was represented in the research?
- How much employee time does it require?
- Is participation genuinely voluntary?
- How will we know whether it helps here?

Do not create another well-being obligation

Even an effective intervention can become another demand. A required mindfulness session, wellness challenge, or after-hours exercise program may land poorly if employees believe the

actual source of stress is excessive workload, insufficient staffing, or another unaddressed workplace condition.

Whenever possible:

- make participation voluntary;
- provide options rather than assuming one approach fits everyone;
- make participation possible during paid time;
- avoid unnecessary tracking or reporting;
- protect privacy; and
- discontinue activities that staff do not find useful.

> **A well-being strategy should not require employees to sacrifice more of their well-being to participate.**

Protect opportunities for recovery

People cannot remain continuously activated by work. The broader occupational literature identifies recovery from work as relevant to employee well-being. A meta-analysis of 54 independent samples involving 26,592 employees found that recovery experiences—including psychological detachment, relaxation, mastery, and control—were related to fatigue and vigor; importantly, work demands and resources were themselves related to employees' ability to recover (Bennett et al., 2018).

That last point matters for schools. Recovery should not be framed solely as something employees need to become better at doing after work. Organizations also shape whether recovery is possible.

Consider whether staff can:

- take scheduled breaks and meal periods;
- disengage from work outside paid or contracted hours;
- step away briefly after an unusually demanding event;
- use available leave;
- avoid unnecessary after-hours communication;

- take vacation or other time away without creating an unmanageable backlog; and
- obtain coverage when they legitimately need to step away.

Some employees may benefit from resources that help them develop recovery practices. But first ask whether organizational expectations are undermining recovery. A large meta-analysis of psychological detachment from work found associations with less exhaustion and fatigue, better sleep, and greater well-being. It also found that greater job demands were associated with poorer detachment (Wendsche & Lohmann-Haislah, 2017).

Do not tell staff to disconnect from work while maintaining expectations that make disconnection impossible.

If employees routinely cannot take breaks or leave because there is no coverage, return to Strategy 2: Ensure Adequate Staffing & Capacity. If work routinely spills into evenings and weekends, return to Strategy 1: Make Workload More Manageable.

Provide appropriate support following highly stressful or emotionally difficult events

Some school work is emotionally intense. Employees may experience student crises, aggression, threats, serious injuries, deaths, community emergencies, disclosures of abuse, or other distressing events. General wellness programming may not be the appropriate response.

After a serious event, staff may need:

- immediate practical assistance;
- relief from duties when appropriate;
- information about available supports;
- access to confidential professional help;
- flexibility or leave;
- supportive follow-up; and
- organizational action to prevent recurrence when the event revealed a system problem.

Different people respond differently. Some employees may want to talk about an event; others may not. Support should therefore be available without requiring emotional disclosure or participation in a particular form of processing.

The first response should also not automatically be psychological. If an employee was assaulted because a student-response system failed, improve the response system. If unsafe equipment caused an injury, address the equipment. If chronic understaffing repeatedly leaves employees alone in unsafe situations, address staffing. Support the person **and** examine the condition.

Improve access to confidential mental-health care

Well-being programming is not a substitute for mental-health treatment. Some employees will experience depression, anxiety, trauma-related symptoms, substance-use concerns, grief, serious stress, or other needs that warrant professional care. These concerns may be related to work, unrelated to work, or both.

Schools and districts can reduce barriers to care through:

- behavioral-health insurance coverage;
- Employee Assistance Programs (EAPs);
- counseling or behavioral-health services;
- telehealth;
- clear referral information;
- crisis resources;
- usable leave; and
- reasonable scheduling flexibility where possible.

But availability is not the same as access. An EAP may exist while staff do not know about it, distrust its confidentiality, cannot obtain an appointment, receive too few sessions for their needs, or cannot attend appointments during available hours.

Ask:

- Do staff know what services are available?
- Can they easily find that information?

- Are confidentiality protections clear?
- Are services affordable?
- Are providers actually available?
- Are virtual options available?
- Are services accessible across languages and cultures?
- What happens when short-term services are insufficient?
- Can employees realistically attend appointments?

Protect confidentiality

Employees may reasonably worry that seeking mental-health support could affect how they are perceived at work. Clearly distinguish confidential clinical or EAP services from supervisory and personnel processes. Do not require employees to disclose diagnoses or treatment information simply because the organization provides a well-being resource.

If data are collected to evaluate an initiative, collect only what is necessary and report results in ways that protect privacy. **Access to care should not require employees to trade away confidentiality.**

Considerations across all four strategies

Make resources easy to navigate

A long list of benefits and telephone numbers is not necessarily an accessible support system. Someone who is already distressed should not have to search multiple websites or determine which of several poorly explained resources applies. Keep information short, current, easy to locate, and clear about confidentiality.

A brief guide can answer practical questions:

- I want help managing everyday stress. What is available?
- I would like confidential counseling. Where do I start?
- I need urgent help. Who do I contact?
- I need longer-term care. How do I find it?

- I need time away from work for my health. Where do I find leave information?

Protect choice

People differ in what they find helpful. An employee may value mindfulness. Another may prefer exercise. Another may already have strong personal supports and want nothing from an employer-sponsored wellness program. Another may need professional treatment rather than a wellness activity. Employees should not have to demonstrate commitment to well-being by participating in a particular activity.

Offer resources. Reduce barriers. Protect choice and privacy.

Continue looking upstream

When many employees need help coping with the same recurring work-related stressor, ask whether there is also an organizational problem to address. Individual support can remain available while the organization works upstream.

What schools have actually tried

One of the stronger school-specific examples is Cultivating Awareness and Resilience in Education (CARE for Teachers), a structured mindfulness-based professional-development program that includes emotion-awareness and regulation skills, mindfulness and stress-reduction practices, and application to teaching.

Jennings and colleagues (2017) evaluated CARE in a cluster randomized trial involving 224 teachers in 36 urban elementary schools. The intervention involved 30 hours of in-person training plus intersession coaching. Compared with the control condition, CARE produced significant improvements in adaptive emotion regulation and mindfulness and reductions in psychological distress and time urgency. It also improved observed emotional support in classrooms.

Follow-up research with the same sample found that some benefits—including reduced psychological distress and improved emotion regulation—were still evident approximately 9.5 months after the intervention (Jennings et al., 2019).

What schools can take from this. Individual-focused strategies should not automatically be dismissed as superficial. Some structured interventions have been tested rigorously and have produced meaningful outcomes. But match the intervention to the problem.

CARE is evidence that a structured intervention can help teachers with some aspects of stress, emotional regulation, and well-being. It is **not** evidence that mindfulness solves excessive workload, staffing shortages, inadequate compensation, unsafe conditions, or poor organizational support.

Also notice the implementation conditions. CARE was a substantial intervention—not a one-hour presentation—and participating teachers were released to participate during paid work time, with substitute coverage provided for a training day.

That is an important lesson in itself: even an individual well-being intervention requires organizational support if staff are expected to participate without creating additional burden.

Evidence note: CARE provides relatively strong causal evidence because it was evaluated using a randomized design. However, the study involved elementary-school teachers in New York City; it does not establish effectiveness for the many other staff groups included in this toolkit. It also supports CARE for the outcomes that actually changed. It does not establish that the intervention changes organizational working conditions.

What does the evidence tell us?

Individual-level educator well-being interventions have a larger direct intervention literature than many of the organizational strategies described elsewhere in Part 2.

Avola et al. (2025) identified 46 intervention studies involving 7,369 participants across 15 countries. Most interventions focused primarily on individual well-being, with approaches including mindfulness, physical activity, therapy-based techniques, gratitude, professional development, and combinations of activities. The review reported positive findings across several categories while emphasizing the heterogeneity of the field.

Cann et al. (2024) similarly identified substantial variation in how educator well-being interventions were conceptualized, measured, and implemented.

This produces an important evidence paradox for the toolkit: Some individual interventions have stronger direct experimental evidence than many organizational strategies. That does not mean individual interventions address the most important causes of staff stress.

It partly reflects what researchers have studied and what can readily be tested experimentally.

Evidence for recovery is also substantial in the broader workforce literature. Meta-analytic evidence links recovery and psychological detachment with several indicators of well-being, while also showing that job demands and resources influence people's capacity to recover (Bennett et al., 2018; Wendsche & Lohmann-Haislah, 2017).

Evidence concerning employer-facilitated **access to professional mental-health care** presents a different question. Evidence-based treatments for mental-health conditions have extensive research support, but that does not establish that a particular school EAP, resource guide, insurance arrangement, or referral process improves access or outcomes. Schools should therefore examine practical access rather than assuming that offering a benefit is sufficient.

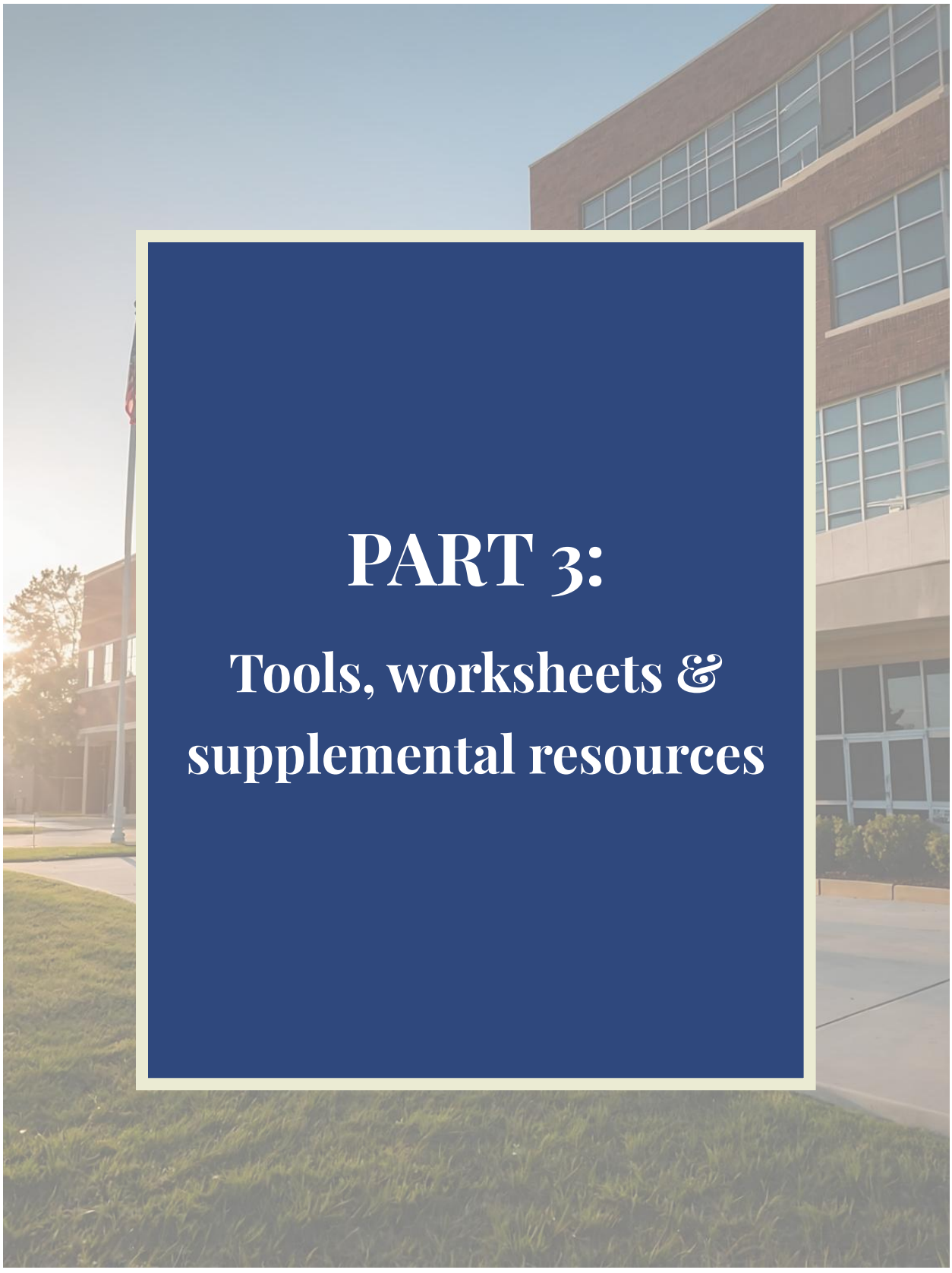
CORE STRATEGY	EVIDENCE CLASSIFICA-TION	WHAT THE EVIDENCE SUGGESTS	LIMITATIONS/ CAUTIONS
Provide evidence-informed stress-management and well-being interventions	Moderate to strong for some teacher outcomes; varies by intervention	Reviews and randomized studies indicate that some structured individual interventions—including mindfulness and related approaches—can improve teacher stress, psychological distress, mindfulness, emotion regulation, or other well-being outcomes (Avola et al., 2025; Jennings et al., 2017).	Interventions vary substantially. Evidence for a structured program should not be generalized to generic "wellness" activities. Research overwhelmingly concerns teachers, and these interventions do not change organizational sources of stress.
Protect opportunities for recovery	Strong general workforce evidence; school-specific intervention evidence limited	Meta-analytic evidence links recovery and psychological detachment with fatigue, exhaustion, sleep, vigor, and well-being (Bennett et al., 2018; Wendsche & Lohmann-Haislah, 2017).	Much of the evidence is not school-specific and is observational. Work demands themselves affect recovery, so recovery should not be framed solely as an individual responsibility.
Provide appropriate support following highly stressful or emotionally difficult events	Strong rationale; specific intervention evidence varies	Practical, relational, and professional support may be important following unusually difficult events, particularly when employees need immediate assistance or professional care.	Responses should fit the event and individual need. Avoid compulsory emotional processing. Recurrent events should also prompt examination of the underlying

CORE STRATEGY	EVIDENCE CLASSIFICA-TION	WHAT THE EVIDENCE SUGGESTS	LIMITATIONS/ CAUTIONS
			organizational or safety conditions.
Improve access to confidential mental-health care	Strong treatment rationale; school-specific access-strategy evidence limited	Effective mental-health treatment is an important resource for employees who need clinical care. Employers can potentially reduce access barriers through insurance, EAPs, telehealth, referral pathways, leave, and clear information.	Evidence that treatment works does not establish that a particular employer access strategy improves use or outcomes. Cost, availability, scheduling, awareness, and confidentiality concerns can make nominally available services difficult to use.

Bottom line. Individual well-being supports belong in a comprehensive staff well-being strategy. Some structured interventions have direct evidence for improving teacher stress, psychological distress, or related outcomes. Employees should also have reasonable opportunities to recover from demanding work and practical access to confidential professional care when they need it. But use individual strategies for the problems they can reasonably address. If the target is coping, recovery, health, or treatment, Strategy 9 may be the right place to act. If the target is a modifiable condition of work, change the condition.

If staff do not have enough time, see Strategy 1: Make Workload More Manageable. If insufficient staffing is creating the demand, see Strategy 2: Ensure Adequate Staffing & Capacity. If the concern involves leadership or organizational response, see Strategy 3: Strengthen Leadership, Supervision, & Organizational Support. If staff need greater influence over their work, see Strategy 4: Give Staff Meaningful Roles in Solving Workplace Problems. If they need expertise, mentoring, consultation, or collegial support, see Strategy 5: Strengthen Professional & Relational Support. If student needs are driving the concern, see Strategy 6: Build Systems That Help Staff Meet Student Needs. If initiative overload is creating the demand, see Strategy 7: Manage Organizational Change & Competing Demands. If compensation, schedules, equipment, facilities, or physical conditions are the problem, see Strategy 8: Improve Employment, Material & Physical Working Conditions.

> **Do not ask an individual strategy to solve an organizational problem. But do not withhold useful individual support simply because organizational change is also needed.**



PART 3:

Tools, worksheets & supplemental resources

Staff well-being plan

Use this plan throughout the five-phase process to capture the most important findings, decisions, and learning from your staff well-being work. Supporting tools and worksheets provide additional structure when needed; this plan captures the information that should carry forward.

Keep it useful rather than comprehensive. You do not need to transfer every finding, discussion, or piece of data into this document. Record enough that a new team member could understand what you are trying to improve, why you made key decisions, what you have learned, and what should happen next.

Update the plan as your understanding changes. Earlier conclusions do not need to be preserved simply because they were written down. When an important decision changes, briefly record **what changed and why** so the reasoning remains visible.

Initiative overview

School/district: _____

Initiative/team name, if applicable: _____

Design team lead/contact: _____

Date work began: _____ Last updated: _____

Current phase: ☐ Phase 1 ☐ Phase 2 ☐ Phase 3 ☐ Phase 4 ☐ Phase 5

At a glance

Use this section as a brief summary of the initiative. Update it as the work progresses.

The staff well-being issue we are currently addressing:

Our current target for change:

The strategy we are currently testing or implementing:

Our next major decision or action:

Phase 1: Prepare & build readiness

Why we started

What prompted this work? Describe the concern, opportunity, event, or information that led the school or district to begin a staff well-being process.

Relevant context

What does someone need to understand about the setting in which this work is taking place? Consider major organizational changes, staffing conditions, other initiatives, leadership transitions, resources, constraints, or other circumstances that may influence the work.

What we learned about readiness

What important strengths or facilitators were identified? How do they impact the work?

What important readiness challenges or barriers were identified? How do they impact the work?

What actions are we taking to strengthen readiness?

Leadership and decision-making

What commitments have leaders made to support the process? Who has authority to make the kinds of decisions this work may require?

Design team

Who is represented on the team?

What important perspectives are not represented directly? How will we include them?

Phase 1 decision

Why are we ready to move forward? What readiness issues will we continue to address as we proceed?

Phase 2: Understand staff experiences

What staff are experiencing

Summarize the most important patterns that emerged from staff input and other information. Include strengths and positive experiences as well as sources of strain.

Important differences

How do experiences differ across roles, groups, settings, schedules, career stages, or other relevant circumstances? What might be hidden by an overall average?

Positive findings

What existing strengths, practices, relationships, resources, or conditions appear to make the situation better?

Uncertainties

What do we still not understand?

Issues warranting deeper investigation

What concerns emerged as potential priorities?

Phase 2 decision

What will we carry into Phase 3, and why?

PHASE 3: Prioritize issues & select potential strategies

Priority and rationale

Priority: Click or tap here to enter text.

Why did we select this issue for focused attention? Summarize the evidence and reasoning. Consider importance, reach, persistence, equity, organizational influence, and opportunity for meaningful improvement.

What other important issues are we not addressing now? Why not? Do we plan to address them in the future?

Problem statement

Describe the problem without assuming its cause or solution. Identify what is happening, who is affected, when or where it occurs, and why it matters.

Contributing factors

Summarize the factors that appear to produce or sustain the problem.

Contributing factor	What supports this conclusion?	Confidence rating
Click or tap here to enter text.	Click or tap here to enter text.	☐ Supported ☐ Plausible ☐ Assumption
Click or tap here to enter text.	Click or tap here to enter text.	☐ Supported ☐ Plausible ☐ Assumption
Click or tap here to enter text.	Click or tap here to enter text.	☐ Supported ☐ Plausible ☐ Assumption

Strengths to protect or build on

What conditions already make the problem less severe or help staff manage it successfully?

Target for change

What condition have we decided to change?

Why is this an important and appropriate target?

Complete the team's current theory:

If we can change Click or tap here to enter text., we expect Click or tap here to enter text. to improve because Click or tap here to enter text..

Strategy selected

Strategy: Click or tap here to enter text.

How is the strategy expected to change the target?

Click or tap here to enter text.

Alternatives considered

Strategy considered	Why we considered it	Why we did not select it
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

Why did we select this strategy? Summarize the rationale, including relevant evidence, staff experience, local context, feasibility, equity, and anticipated burden.

What assumptions do we have about this strategy? What must be true for this strategy to work here?

What do we most need to learn through the pilot?

Phase 4: Pilot test strategy & assess success

Pilot test

What did we test?

Who participated, where, and for how long?

What did we expect to happen?

What we learned

Did we implement the strategy as intended?

Did the target condition change?

What did staff experience? What helped? What remained difficult?

What else happened? Describe important unintended benefits, problems, burdens, or consequences.

Who experienced the pilot differently?

What happened to our assumptions?

Important assumption	What we learned	Still uncertain?
Click or tap here to enter text.	Click or tap here to enter text.	☐
Click or tap here to enter text.	Click or tap here to enter text.	☐
Click or tap here to enter text.	Click or tap here to enter text.	☐

Phase 4 decision

☐ Keep as designed
☐ Adapt and test again
☐ Expand the test
☐ Move to broader implementation
☐ Return to Phase 3
☐ Stop this strategy

Why did you make this decision?

What changes will we make before broader implementation?

Phase 5: Implement, adapt & sustain

What we are implementing

What is the core purpose of the strategy we are implementing?

What core elements need to remain in place for the strategy to accomplish its purpose?

What elements are flexible? What can vary across staff, settings, schedules, or other contexts?

What should not change or happen as the strategy is adapted?

Implementation barriers and facilitators

What conditions are most likely to affect implementation? Consider factors such as strategy, people, team and relationships, leadership, workflow and systems, resources and capacity, or broader context.

What will help implementation?

What could get in the way?

Implementation strategies and rationale

What will you do to support successful implementation? Connect each support to the condition it is intended to address.

Barrier or need	Implementation strategy/ support	Why this support?	Who is responsible?
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

Implementation and well-being outcomes

Was the strategy implemented? What happened in terms of reach, use, feasibility, fidelity to core elements, or other aspects of implementation?

Did it help? What happened to the target condition and the staff experience the strategy was intended to improve?

What else happened? What unintended benefits, problems, inequities, or burdens emerged?

Who experienced the change differently?

Adaptations

Record adaptations that meaningfully changed the strategy, its implementation supports, or the surrounding system.

What changed?	Why?	What happened?	Keep the change?
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

Next decision

What have we learned overall? Summarize the most important conclusion from the work to date.

What should happen next?

☐ CONTINUE — Maintain the strategy largely as implemented.

☐ EXPAND — Extend it to additional staff, settings, or circumstances.

☐ ADAPT — Continue the strategy with meaningful changes.

☐ REDUCE — Retain useful components while reducing unnecessary activity or support.

☐ REPLACE — Use another strategy that now appears more appropriate.

☐ STOP / DE-IMPLEMENT — Discontinue the strategy or selected components.

☐ RETURN TO AN EARLIER PHASE — New learning requires us to reconsider the problem, contributing factors, target, or strategy.

Why should this happen next?

What needs to be sustained? What should become part of normal schedules, workflows, policies, roles, onboarding, resources, monitoring, or leadership responsibilities?

What should be changed or stopped?

What do we still need to learn?

Next steps

Next step	Person(s) responsible	By when?
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

Next review date: Click or tap to enter a date.

Reflection: Is our school/district ready for this process?

Back to Phase 1

Use the following questions to begin a conversation about readiness. The goal is not necessarily to answer every question, but to surface different perspectives, identify areas of agreement or uncertainty, and better understand the context in which the work will take place. Select the most useful questions for understanding your current readiness.

Motivation and commitment

- What tells us that staff well-being deserves our attention right now?
- What are we hearing or seeing that suggests staff well-being is important to address?
- If nothing changes over the next three years, what could happen?
- How is staff stress affecting students, families, staff retention, or the broader school community?
- Where does staff well-being currently fit among school or district priorities?
- How confident are we that changes to working conditions and organizational practices (not just self-care) can make a meaningful difference?
- What have we learned from previous staff well-being efforts? Why might this approach lead to different results?
- Why is now the right time (or not the right time) to begin this work?
- Are staff and leaders willing to invest sustained attention, time, and resources in this work?

General organizational capacity

- Does our organization have a strong foundation for improvement and change?
- How safe is it for staff to share honest feedback, including concerns about existing practices?
- How much trust exists between staff and leadership?
- How effectively do staff and leaders work together to solve problems?
- Do staff have meaningful opportunities to participate in decisions that affect their work?
- What previous improvement efforts have gone well? What organizational conditions contributed to their success?
- What have we learned from improvement efforts that struggled?

- How effectively does the organization create time and space for collaborative problem-solving and improvement?
- How comfortable are we using data and staff feedback to guide decisions?
- How do we typically respond when data or feedback reveal uncomfortable truths?
- How well do we communicate decisions and explain how staff input influenced them?
- How effectively do we adapt when an improvement effort does not go as planned?

Capacity specific to this work

- Who will champion this effort?
- Who will coordinate and help move the work forward?
- Can we create a design team that represents different roles, perspectives, and experiences?
- Will design team members have sufficient time to participate meaningfully?
- How will we create conditions in which staff can speak candidly about their experiences?
- Do we have the skills and methods needed to gather, interpret, and use staff input effectively?
- Are there areas in which we may need outside support, such as facilitation, information gathering, or data analysis?
- Does the design team have sufficient influence or access to decision makers to pursue meaningful changes?
- How will we communicate what we hear, what we decide, and what happens next?
- Do we have the resources and capacity to test potential solutions, gather feedback, and adapt them based on what we learn?
- How committed are leaders to identifying and addressing root causes of stress and burnout?
- How willing are we to examine policies, practices, routines, working conditions, or resource decisions that may contribute to stress?
- If staff identify issues that are difficult or expensive to address, how will we respond?
- How can successful changes become part of how we work rather than a one-time initiative?

Overall reflection

- What gives us confidence that we are ready to begin? What gives us pause?
- Which readiness conditions are strongest? Which need attention?
- What could we strengthen before beginning the design process?
- Which challenges can we address as part of the process rather than waiting until conditions are perfect?

Readiness assessment

Back to Phase 1

For each statement, rate the extent to which the condition is currently in place. Consider including people with different roles and perspectives in the rating process. Differences in ratings can be as informative as the ratings themselves and may identify issues that warrant further discussion.

1 = Not in place 2 = Partially in place 3 = Mostly in place 4 = Strongly in place

Motivation and commitment

READINESS ITEM	RATING (1-4)
Staff and leaders view improving staff well-being as an important organizational priority.	Click or tap here to enter text.
There is recognition that working conditions and organizational practices can contribute to staff stress and well-being.	Click or tap here to enter text.
There is interest in addressing underlying causes of stress—not only offering individual wellness activities.	Click or tap here to enter text.
Staff and leaders believe meaningful improvement is possible.	Click or tap here to enter text.
There is sufficient urgency and commitment to sustain attention to this work over time.	Click or tap here to enter text.
The proposed approach is seen as compatible with other school or district priorities.	Click or tap here to enter text.
Staff and leaders see value in investing time and resources in this work.	Click or tap here to enter text.

Consider: Where is motivation strongest? Where is there uncertainty or resistance? What might increase the perceived importance, value, or feasibility of this work?

General Organizational Capacity

1 = Not in place 2 = Partially in place 3 = Mostly in place 4 = Strongly in place

READINESS ITEM	RATING (1-4)
Leaders provide visible and consistent support for organizational learning and improvement.	Click or tap here to enter text.
Staff generally trust that concerns can be raised without negative consequences.	Click or tap here to enter text.
Staff have meaningful opportunities to participate in decisions that affect their work.	Click or tap here to enter text.
Staff and leaders can work together effectively to identify and solve problems.	Click or tap here to enter text.
The organization communicates effectively across roles and groups.	Click or tap here to enter text.
Leaders communicate transparently about decisions, including how staff input influenced those decisions.	Click or tap here to enter text.
The organization has structures and routines that create space for collaborative problem-solving and improvement.	Click or tap here to enter text.
The organization has experience using data and feedback to guide decisions.	Click or tap here to enter text.
The organization can follow through on improvement priorities.	Click or tap here to enter text.
The organizational climate supports experimentation, learning, and course correction.	Click or tap here to enter text.

Consider: Which aspects of our organizational environment will support this work? Which could make meaningful staff participation or organizational change more difficult

Click or tap here to enter text.

Capacity specific to this work

1 = Not in place 2 = Partially in place 3 = Mostly in place 4 = Strongly in place

READINESS ITEM	RATING (1-4)
We have – or can create – a representative design team.	Click or tap here to enter text.
We have an identified leader or champion who can build support for and help advance this work.	Click or tap here to enter text.
Design team members will have sufficient protected time to participate meaningfully.	Click or tap here to enter text.
We have ways to gather candid input from staff.	Click or tap here to enter text.
We can access useful data about staff experiences and working conditions.	Click or tap here to enter text.
We have – or can access- people with the skills needed to facilitate listening, design, and improvement activities effectively.	Click or tap here to enter text.
The design team has sufficient authority or influence to pursue meaningful changes.	Click or tap here to enter text.
Leaders are willing to consider changes to policies, practices, routines, working conditions, or resource allocation when these contribute to staff stress.	Click or tap here to enter text.
Leaders are prepared to hear and respond constructively when staff identify difficult, sensitive, or potentially costly issues.	Click or tap here to enter text.
Resources are available to test at least some potential solutions.	Click or tap here to enter text.
We have the capacity to pilot potential strategies, gather feedback, and adapt them based on what we learn.	Click or tap here to enter text.
We have a way to communicate what we hear, what we decide, and what happens next.	Click or tap here to enter text.

Consider: Which capacities are already in place? What additional people, skills, resources, authority, or supports might be needed to carry out this process successfully?

Readiness summary & plan

Back to Phase 1

Based on the readiness information that you have gathered:

What are your strongest readiness assets?

What conditions could interfere with this staff well-being initiative?

What conditions should be addressed before starting a staff well-being initiative?

What conditions can be strengthened while you move forward with this initiative?

What specific actions will you take to build readiness? Who will take these actions, and when will they occur?

With whom should you share this information? When and in what format?

Reflection: Will school leaders support the staff well-being initiative?

Back to Phase 1

Use the following questions to begin a conversation about leadership support. The goal is not necessarily to answer every question, but to surface different perspectives, identify areas of agreement or uncertainty, and better understand the context in which the work will take place.

- Who are the leaders whose support will be important to this work? Who has formal decision-making authority? Who has informal influence?
- How have leaders demonstrated that staff well-being is—or is not—an organizational priority?
- Do leaders understand the purpose and basic approach of this initiative, including its emphasis on staff voice and organizational causes of stress?
- Are leaders prepared to listen to staff experiences without assuming they already know the problems or solutions?
- How comfortable are leaders hearing feedback that may be critical of existing policies, practices, routines, or leadership decisions?
- Are leaders willing to consider organizational changes to reduce staff stress?
- What authority will the design team have? What decisions can it make independently, and which decisions will require leadership approval?
- Are leaders willing and able to provide time, resources, information, and access to decision makers when needed?
- How will leaders protect opportunities for candid staff participation, particularly when staff perspectives differ from leadership perspectives?
- How do leaders typically respond when improvement efforts encounter barriers or do not work as expected?
- Will leaders support testing and adapting strategies rather than expecting the first solution to work perfectly?
- How will leaders communicate what they hear, what decisions are made, and why?
- What might compete with leadership attention to this work? How can support be sustained over time?
- Are there important leaders who are uncertain, skeptical, or opposed? What concerns are driving their perspective?

Leadership support assessment

Back to Phase 1

The following assessment is informed by the four dimensions of implementation leadership identified by Aarons and colleagues (2014)—**proactive, knowledgeable, supportive, and perseverant leadership**—and incorporates additional principles from human-centered design and implementation science that are particularly important to this staff well-being process.

Whenever possible, gather perspectives from people in different roles rather than relying exclusively on leader self-assessment. Differences in ratings can provide important information about where additional discussion, clarification, or action may be needed. For each statement, rate the extent to which the condition is currently in place:

1 = Not in place | 2 = Partially in place | 3 = Mostly in place | 4 = Strongly in place | ? = We do not know/ more information is needed

Proactive Leadership: Do leaders anticipate what will be needed and actively create conditions for the work to succeed?

LEADERSHIP BEHAVIOR	RATING (1-4)
Leaders communicate that improving staff well-being is an important organizational priority.	Click or tap here to enter text.
Leaders help clarify roles, responsibilities, decision-making authority, and expectations for the work.	Click or tap here to enter text.
Leaders anticipate potential barriers and work with the team to address them.	Click or tap here to enter text.
Leaders provide or help secure the time, information, resources, and access to the decision-makers needed to carry out the work.	Click or tap here to enter text.
Leaders connect this work to broader school or district priorities rather than treated it as an isolated initiative.	Click or tap here to enter text.

Knowledgeable Leadership: Do leaders understand the work well enough to guide and support it effectively?

1 = Not in place | 2 = Partially in place | 3 = Mostly in place | 4 = Strongly in place | ? = We do not know/ more information is needed

LEADERSHIP BEHAVIOR	RATING (1-4)
Leaders understand that working conditions and organizational practices affect staff well-being (not just individual factors).	Click or tap here to enter text.
Leaders understand the purpose and major steps of the staff well-being design and implementation process.	Click or tap here to enter text.
Leaders understand the importance of gathering staff perspectives before deciding what problems or solutions should be prioritized.	Click or tap here to enter text.
Leaders understand the value of testing potential strategies, gathering feedback, and adapting them before broader implementation.	Click or tap here to enter text.
Leaders know when and where to seek additional information, expertise, or support when implementation challenges arise.	Click or tap here to enter text.

Supportive Leadership: Do leaders actively support the people doing the work and create conditions that enable meaningful participation?

1 = Not in place | 2 = Partially in place | 3 = Mostly in place | 4 = Strongly in place | ? = We do not know/ more information is needed

LEADERSHIP BEHAVIOR	RATING (1-4)
Leaders create conditions in which staff can share candid feedback without fear of negative consequences.	Click or tap here to enter text.
Leaders protect time for staff and design team members to participate meaningfully in the process.	Click or tap here to enter text.
Leaders recognize and support staff who contribute time and effort to design and implementation activities.	Click or tap here to enter text.
Leaders respond constructively when the design team encounters barriers or needs assistance.	Click or tap here to enter text.
Leaders help remove organizational or system barriers that the design team cannot address on its own.	Click or tap here to enter text.

Perseverant Leadership: Do leaders maintain commitment while supporting learning and adaptation when challenges arise?

1 = Not in place | 2 = Partially in place | 3 = Mostly in place | 4 = Strongly in place | ? = We do not know/ more information is needed

LEADERSHIP BEHAVIOR	RATING (1-4)
Leaders maintain attention to staff well-being when competing priorities emerge.	Click or tap here to enter text.
Leaders follow through on commitments made during the process.	Click or tap here to enter text.
Leaders remain engaged when the work encounters setbacks, resistance, or unexpected challenges.	Click or tap here to enter text.
Leaders support learning and adaptation when a strategy does not work as expected rather than abandoning the effort or assigning blame.	Click or tap here to enter text.
Leaders support continued attention to successful changes so that improvements can become part of routine organizational practice.	Click or tap here to enter text.

Participatory and Transparent Leadership: Do leaders share influence, listen openly, and communicate honestly throughout the process?

1 = Not in place | 2 = Partially in place | 3 = Mostly in place | 4 = Strongly in place | ? = We do not know/ more information is needed

LEADERSHIP BEHAVIOR	RATING (1-4)
Leaders listen with curiosity and openness, including when staff feedback challenges existing assumptions, practices, or leadership decisions.	Click or tap here to enter text.
Leaders make space for perspectives from different roles and groups, including people whose voices may be less represented in routine decision-making.	Click or tap here to enter text.
Leaders supporting meaningful staff participation in identifying problems, prioritizing needs, and developing potential solutions.	Click or tap here to enter text.
Leaders are willing to examine policies, practices, routines, working conditions, and resource decisions that may contribute to staff stress.	Click or tap here to enter text.
Leaders respond constructively when staff identify issues that are difficult, sensitive, or costly to address.	Click or tap here to enter text.
Leaders communicate transparently about what is being learned, how decisions will be made, and what happens next.	Click or tap here to enter text.
Leaders explain how staff input influenced decisions and provide explanations if recommendations cannot be acted upon.	Click or tap here to enter text.

Leadership summary & plan

Back to Phase 1

Based on the leadership information that you have gathered:

What leadership strengths can we build on?

What leadership behaviors need to be strengthened?

What differences in perspectives emerged? What else needs to be done to ensure that varying perspectives are identified and understood?

What questions need to be clarified with leadership?

What specific actions are needed to strengthen leadership support? Who will take these actions, and when will they occur?

Reflection: Do we have a design team prepared to lead this work?

Back to Phase 1

Before forming the design team, discuss what the team will need to accomplish, whose perspectives are important, and what conditions will help members participate meaningfully. Revisit these questions as the work progresses; the answers may change as the team learns more about staff experiences and the organizational conditions affecting well-being. You do not need to answer all questions. Select the ones that are most meaningful to your initiative.

Purpose & authority

- What are we asking this team to accomplish? Is the scope specific and manageable enough for the team to make meaningful progress?
- How does the team's work connect to other school or district priorities and improvement efforts?
- What decisions can the design team make independently? What requires leadership or other approval?
- What resources, information, time, or organizational support will the team need to do the work well?

Representation & perspective

- Whose day-to-day work and well-being could be affected by the issues or changes this team considers?
- Which roles, work settings, and experiences need to be represented on the team?
- Whose perspectives are often less visible or less influential in organizational decision making?
- Who has informal credibility or relationships that could help the team understand experiences beyond its own?
- Which important perspectives cannot realistically be represented on the team? How and when will we seek those perspectives?
- Are we asking any individual to “represent” an entire group whose experiences are likely to vary considerably?

Participation & power

- What differences in authority, status, role, or relationships could affect who speaks candidly and whose ideas receive the most attention?

- What would help members feel comfortable questioning assumptions, disagreeing, acknowledging uncertainty, or raising difficult issues?
- When will leadership participation strengthen the process, and when might staff benefit from opportunities to talk or work without supervisors present?
- What team norms or practices could help prevent one person, role, or perspective from dominating the process?

Skills, mindsets & ways of working

- What strengths do potential team members bring—for example, curiosity, empathy, creativity, practical knowledge, constructive skepticism, facilitation skills, or ability to follow through?
- Does the team include people who will ask good questions as well as people who can help turn ideas into action?
- How comfortable are members with exploring a problem before deciding on a solution?
- How will we recognize when we are relying on assumptions rather than evidence?
- How will we respond when staff feedback challenges our own experiences, assumptions, or preferred solutions?
- What skills or expertise might we need to access from outside the core team?

Connection & accountability

- How will the team stay connected to staff who are not members?
- How will staff know what the team is learning and how their input is being used?
- How will we continue to ask "Whose perspective are we missing?" as the work evolves?
- How will we respond when staff identify an important issue that the team does not have the authority or resources to address?
- How will we know whether the team is functioning well—and what will we do if it is not?

Design team assessment

Back to Phase 1

Use this assessment to identify strengths and areas that may need attention as the team's work evolves. Because team dynamics change over time, consider completing the assessment at several points, such as after the team is formed, after the team has gathered and interpreted staff experiences, and during pilot testing or implementation. Whenever possible, have members complete the assessment individually before discussing their responses as a group. Differences in ratings can reveal important issues that might otherwise remain hidden.

1 = Not in place | 2 = Partially in place | 3 = Mostly in place | 4 = Strongly in place | ? = We do not know/ more information is needed

Purpose, Structure & Support: Do we have a clear and manageable charge and the structures and support needed to carry it out?

DESIGN TEAM CHARACTERISTICS	RATING (1-4)
We understand what our team is responsible for accomplishing.	Click or tap here to enter text.
We have a manageable scope for our work.	Click or tap here to enter text.
We understand how our work connects to broader school or district priorities.	Click or tap here to enter text.
Members understand their roles and responsibilities on the team.	Click or tap here to enter text.
We know what decisions the team can make and what requires approval.	Click or tap here to enter text.
We have sufficient time and organizational support to do the work well.	Click or tap here to enter text.
Leadership understands and supports the team's role and work.	Click or tap here to enter text.
We have access to the people, information, resources, and decision makers needed to move the work forward.	Click or tap here to enter text.

1 = Not in place | 2 = Partially in place | 3 = Mostly in place | 4 = Strongly in place | ? = We do not know/ more information is needed

Representation & Inclusion: Do we bring together the perspectives needed for this work and create conditions in which those perspectives have meaningful influence?

DESIGN TEAM CHARACTERISTIC	RATING (1-4)
The team includes people from different staff roles relevant to the work.	Click or tap here to enter text.
The team represents different work settings, responsibilities, and experiences within the school or district.	Click or tap here to enter text.
We include both people who understand organizational decision making and people who experience its effects in their day-to-day work.	Click or tap here to enter text.
The team includes people with informal credibility and connections to different groups of staff.	Click or tap here to enter text.
Perspectives that are often less represented in organizational decision making are included or have a clear way to inform our work.	Click or tap here to enter text.
Members participate actively and have meaningful opportunities to contribute.	Click or tap here to enter text.
Different perspectives, questions, and respectful disagreement are welcomed.	Click or tap here to enter text.
No individual, role, or level of authority consistently dominates discussions or decisions.	Click or tap here to enter text.
Members can raise difficult issues or challenge assumptions without fear of negative consequences.	Click or tap here to enter text.
We actively identify and seek perspectives that are not represented on the team.	Click or tap here to enter text.

1 = Not in place | 2 = Partially in place | 3 = Mostly in place | 4 = Strongly in place | ? = We do not know/ more information is needed

Team Process & Functioning: Do we have effective ways of working together and moving the work forward?

DESIGN TEAM CHARACTERISTIC	RATING (1-4)
Meetings have clear purposes and agendas.	Click or tap here to enter text.
Team norms support respectful listening, equitable participation, and constructive disagreement.	Click or tap here to enter text.
We have an effective and understood process for making decisions.	Click or tap here to enter text.
We document important decisions, responsibilities, and next steps.	Click or tap here to enter text.
Members follow through on commitments between meetings.	Click or tap here to enter text.
We use our meeting time effectively while making enough space for exploration and discussion.	Click or tap here to enter text.
We address tensions or disagreements constructively rather than avoiding them.	Click or tap here to enter text.
We periodically reflect on how well the team is functioning and make changes when needed.	Click or tap here to enter text.

1 = Not in place | 2 = Partially in place | 3 = Mostly in place | 4 = Strongly in place | ? = We do not know/ more information is needed

Learning & Human-Centered Design: Are we approaching the work with curiosity, evidence, and a willingness to learn and adapt?

DESIGN TEAM CHARACTERISTIC	RATING (1-4)
We seek to understand staff experiences before deciding what the problems or solutions are.	Click or tap here to enter text.
We approach staff experiences with curiosity and openness, including when they challenge our assumptions.	Click or tap here to enter text.
We resist jumping prematurely to solutions.	Click or tap here to enter text.
We distinguish what we know from what we assume and seek additional information when needed.	Click or tap here to enter text.
We look for underlying organizational conditions and contributing factors rather than focusing only on symptoms.	Click or tap here to enter text.
We consider how problems and potential solutions may be experienced differently by different groups of staff.	Click or tap here to enter text.
We are willing to generate and consider multiple possible solutions rather than becoming attached to the first promising idea.	Click or tap here to enter text.
We are willing to test ideas on a small scale before implementing them broadly.	Click or tap here to enter text.
We use staff feedback and other evidence to learn from pilot testing.	Click or tap here to enter text.

DESIGN TEAM CHARACTERISTIC	RATING (1-4)
We treat unexpected or disappointing results as opportunities to learn rather than simply as failures.	Click or tap here to enter text.
We change course when evidence suggests that an idea or approach needs to be adapted.	Click or tap here to enter text.

1 = Not in place | 2 = Partially in place | 3 = Mostly in place | 4 = Strongly in place | ? = We do not know/ more information is needed

Connection, Influence, & Accountability: Are we staying connected to the broader staff and ensuring that what we learn can lead to meaningful action?

DESIGN TEAM CHARACTERISTIC	RATING (1-4)
We regularly communicate with staff outside the design team.	Click or tap here to enter text.
We have effective ways to gather input from people who are not members of the team.	Click or tap here to enter text.
We communicate what we are learning, what decisions are being made, and what happens next.	Click or tap here to enter text.

1 = Not in place | 2 = Partially in place | 3 = Mostly in place | 4 = Strongly in place | ? = We do not know/ more information is needed

Learning & Human-Centered Design: Are we approaching the work with curiosity, evidence, and a willingness to learn and adapt?

DESIGN TEAM CHARACTERISTIC	RATING (1-4)
Staff can see how their input is influencing the process and resulting decisions.	Click or tap here to enter text.
When staff suggestions or priorities cannot be acted upon, we communicate the reasons clearly.	Click or tap here to enter text.
We have sufficient authority or influence—or access to people with that authority—to make meaningful progress.	Click or tap here to enter text.
We identify barriers that the team cannot address on its own and bring them to the appropriate leaders or decision makers.	Click or tap here to enter text.
We remain accountable to the staff whose experiences are informing the work, rather than allowing organizational convenience to become the primary driver of decisions.	Click or tap here to enter text.

Design team summary & plan

Back to Phase 1

Based on the design team information that you have gathered:

What are the strengths of our current team?

What perspectives are missing from the team?

What skills or ways of thinking do we need to add or strengthen?

Who do we need to engage beyond the design team?

What about the team's composition, structure, or ways of working needs attention before we begin?

What can be strengthened as we proceed?

What specific actions are needed to strengthen the design team? Who will take these actions, and when will they occur?

Design team charter

Back to Phase 1

Use this charter to establish a shared understanding of the design team's purpose, membership, authority, resources, and ways of working. Complete it together when the team is formed and revisit it as the work evolves.

Purpose & Scope

Why does this design team exist? Briefly describe the purpose of the team and the staff well-being work it will guide.

What is the team responsible for?

What is outside the team's current scope?

How does this work connect to broader school or district priorities?

Membership

Design team member	Role/Position	Perspective or Strengths	Team Role, if applicable
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

Design team member	Role/Position	Perspective or Strengths	Team Role, if applicable
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

Consider whether the team needs designated responsibilities such as a **facilitator, coordinator, note taker, communication lead, data/information lead, or leadership liaison**. These roles can rotate and one person may fill more than one role.

What perspectives do we need to hear that are not represented directly on the team?

How will we engage these individuals or groups?

Decision-Making & Authority

The design team can independently:

The design team can recommend, but needs approval to:

The design team is not authorized to:

When approval is needed, who has decision-making authority?

How will we handle decisions when we cannot reach agreement?

How will the team make its own decisions?

☐ Consensus
☐ Majority agreement
☐ Advice/recommendation to a designated decision maker
☐ Different approaches depending on the decision
☐ Other: Click or tap here to enter text.

Confidentiality & Psychological Safety

Staff well-being discussions may involve sensitive experiences, concerns about organizational practices, or feedback about leadership and working conditions. Establish clear expectations about what information will remain confidential and what information needs to be shared.

What information shared within the team will remain confidential?

What information may be shared outside the team, and in what form?

How will we protect the identities of staff who provide candid feedback?

Are there circumstances in which confidentiality cannot be guaranteed? How will we communicate those limits?

How will we respond if a team member raises a difficult or sensitive concern?

Meetings & Participation

Meeting frequency: Click or tap here to enter text.

Typical meeting length: Click or tap here to enter text.

Meeting location/format: Click or tap here to enter text.

Who will schedule and coordinate meetings? Click or tap here to enter text.

How will agendas be developed and shared? Click or tap here to enter text.

What do we expect from members between meetings?

How will we make participation manageable and avoid adding unnecessary burden to already-stressed staff?

Resources & Support

Time available for this work:

Financial or other resources available for gathering staff input, testing strategies, or other design activities:

Data or information the team can access:

People or expertise the team can access for additional support:

Leadership support available to remove barriers or secure additional resources:

Known resource constraints we need to consider:

Communication & Feedback Loops

How will staff know what the design team is doing?

How can staff provide input to the team?

How often will we communicate with the broader staff?

How will we communicate:

- What we heard from staff? Click or tap here to enter text.
- What we are learning? Click or tap here to enter text.
- What decisions were made? Click or tap here to enter text.
- How staff input influenced those decisions? Click or tap here to enter text.
- What happens next? Click or tap here to enter text.
- Why some suggestions or priorities may not be acted upon? Click or tap here to enter text.

How will the team communicate with leadership and other decision makers?

Group Norms

Agree on a small number of norms that describe how members want to work together, particularly when perspectives differ or difficult issues arise. Consider norms such as:

- Be curious before being certain. Ask questions and seek to understand before proposing solutions.
- Listen to understand. Make space for experiences that differ from your own.
- Share the air. Pay attention to who is speaking, who is not, and whose perspectives are receiving the most attention.
- Challenge ideas, not people. Respectful disagreement strengthens the work.
- Distinguish assumptions from evidence. Be willing to say, “We don't know yet.”
- Stay focused on underlying causes. Resist moving too quickly toward familiar or easy solutions.
- Make it safe to change your mind. New information should be allowed to change the team's thinking.
- Learn rather than blame. Treat unsuccessful ideas and unexpected results as information.
- Honor confidentiality. Follow the team's agreements about what can and cannot be shared.
- Follow through. Complete commitments or communicate when circumstances make that impossible.

Accountability & Review

How will we know whether the team is functioning effectively?

When will we complete or revisit the Design Team Functioning Assessment? Click or tap here to enter text.

When will we review and update this charter? Click or tap here to enter text.

Who is responsible for making sure identified team-functioning issues are addressed? Click or tap here to enter text.

Our Commitment

This charter represents our current agreements about how we will work together. We recognize that the design process is iterative and that our team's needs may change as we learn. We will revisit these agreements when needed rather than treating the charter as fixed.

Date adopted: _____

Date to revisit: _____

Staff engagement plan

Back to Phase 2

What do we need to know?	Whose experience? What source?	What method?	Who may be missed?	How will we use it?
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

Sample: Staff experience survey

Back to Phase 2

Introduction

We are working to better understand what helps staff do their work well and what aspects of the work environment create unnecessary difficulty or strain. Your responses will be used to identify areas that deserve deeper attention. This survey is not intended to evaluate individual employees or supervisors. Findings will be reviewed in aggregate and used to guide the next stage of the staff well-being process.

[INSERT LOCAL CONFIDENTIALITY/ANONYMITY INFORMATION.]

Core questions

Consider using a consistent response scale such as: Strongly disagree / Disagree / Neither agree nor disagree / Agree / Strongly agree / Not applicable

WORKLOAD AND TIME

- I can usually complete my most important responsibilities within the time available.
- I have adequate uninterrupted time for work that requires concentration.
- Expectations for my role are manageable.
- I understand which responsibilities should take priority when demands compete.
- Work routinely spills beyond my scheduled work time. [reverse direction]

STAFFING, RESOURCES AND SUPPORT

- I can access the people or expertise I need when problems arise.
- Staffing and coverage are generally adequate for the work I am expected to do.
- I have the materials, technology, and other resources I need.
- When demands exceed what I can reasonably manage alone, I know where to seek help.

LEADERSHIP AND SUPERVISION

- My supervisor or school leaders listen seriously to staff concerns.
- I receive useful guidance or feedback when I need it.
- Leaders communicate clearly about important decisions and changes.
- When staff raise concerns, leaders explain how those concerns will be addressed.

- I can raise concerns without fear of negative consequences.

VOICE AND AUTONOMY

- I have appropriate flexibility in how I carry out my work.
- Staff have meaningful opportunities to influence decisions that affect their work.
- My professional knowledge and experience are valued.
- When staff are asked for input, it is clear how that input will be used.

PROFESSIONAL AND COLLEGIAL SUPPORT

- I can rely on colleagues for help when I need it.
- I have access to appropriate mentoring, coaching, consultation, or professional support.
- I feel respected by the people I work with.
- I feel that I belong in this workplace.

SYSTEMS FOR MEETING STUDENT NEEDS

- I know what to do when a student's needs exceed what I can reasonably address in my role.
- I can access timely support when student needs escalate.
- Roles and responsibilities for responding to student needs are clear.
- Our systems help staff respond effectively rather than leaving individuals to solve difficult situations alone.

ORGANIZATIONAL CHANGE AND COMMUNICATION

- The number and pace of new initiatives are manageable.
- When new responsibilities are added, existing demands are reconsidered.
- Changes are communicated clearly enough for me to understand what is expected.
- Staff receive adequate support to implement important changes.

PHYSICAL AND MATERIAL WORKING CONDITIONS

- My physical work environment allows me to do my job safely and effectively.
- I have reasonable access to appropriate workspace, equipment, and basic facilities.
- The physical demands of my role are manageable.

OVERALL QUESTIONS

- Overall, how manageable does your work feel right now?
- Overall, how well does this organization support staff in doing their work well?
- How often do you feel emotionally exhausted by your work?
- How often do you seriously consider leaving your current position?

OPEN-ENDED QUESTIONS

- What currently helps you do your job well?
- What most interferes with your ability to do your job well?
- What is one change to the work environment that would make the greatest positive difference?
- Is there anything important about your experience at work that we did not ask about?

Optional topic modules

Do not automatically add every possible question. Develop short modules when the learning agenda requires more information about a particular area—for example planning time, student behavior, supervision, professional support, staffing, safety, or organizational change.

Sample interview/listening session guide

Back to Phase 2

Opening

Thank you for participating. We are trying to understand what helps staff do their work well and where aspects of the work environment create difficulty or strain. We are interested in understanding experiences, not evaluating individuals or assigning blame. We may hear different perspectives, and those differences are useful.

[INSERT LOCAL CONFIDENTIALITY GUIDANCE.]

Start broadly

- What helps you do your work well here?
- What makes your work harder than it needs to be?
- What aspects of your work have the greatest effect on your well-being?

Explore important experiences

- You mentioned ____. Can you tell me about a recent time when that happened?
- What happened first?
- What happened next?
- What were you trying to accomplish?
- What made the situation easier or harder?
- Who else was involved or affected?

Look for patterns and variations

- How often does this happen?
- When is it better? When is it worse?
- Does everyone in your role experience this similarly?
- Who might experience this differently?

- Are there times or settings where this process works particularly well?

Explore strengths

- What currently helps?
- Who or what makes this easier?
- Can you think of a time when this worked well? What was different?

Understand consequences

- How does this affect your ability to do your work?
- What happens to other responsibilities when this occurs?
- Does the effect extend to other staff? If so, how?

Invite ideas without prematurely selecting solutions

- If this aspect of work could be improved, what would you hope would be different?
- What should the design team understand before considering possible changes?

Closing

- What have we not asked that you think we need to understand?

Strategies to document work in action

Back to Phase 2

Direct observation

Goal: Observe a defined process or period of work.

For example:

- How often is protected planning time interrupted?
- What happens during arrival, dismissal, lunch, recess, or other high-demand periods?
- What happens after a staff member requests help with a student?
- Where do delays occur during a referral or handoff?
- What competing demands occur during a particular period of the day?

Record what is relevant to the question rather than trying to document everything.

Time sampling

Observe or record activity at predetermined intervals—for example every 15 or 30 minutes. This can help distinguish **scheduled time** from **usable time**. A teacher may technically have 45 minutes of planning time. Time sampling may reveal that much of it is routinely consumed by student needs, coverage, communication, transitions, or other responsibilities.

Time or activity diaries

Ask staff to briefly document activity over a limited period. A simple diary might ask:

Time	What I intended to do	What actually happened	Interruption/ Change	Work displaced	Completed later?

This can capture work that an external observer would miss, including after-hours work. Keep the recording period brief. A method designed to study workload should not itself become a significant workload.

Interruption logs

For concerns involving fragmented time, staff can record interruptions during a defined period:

When	Source of interruption	Urgent?	Approximate time	What was displaced?	What happened to that work?

An interruption log can reveal whether "not enough time" reflects the amount of scheduled time, the reliability of that time, or both.

Event sampling

Rather than recording an entire day, document a particular type of event whenever it occurs.

For example, if the team wants to understand student-support response:

Need/ event	Help requested	Response	Wait	What staff did while waiting	Outcome/ follow-up

Event sampling can help identify patterns that staff may find difficult to estimate retrospectively.

Process mapping

Follow a recurring process from beginning to end. At each step, try to discover and document what actually happened Process mapping can be useful for referrals, behavior support, coverage, documentation, purchasing, communication, onboarding, incident response, and many other recurring processes.

At each step ask:

- Who is responsible?
- What information is needed?
- How long does the step take?
- Where is a decision made?
- Where does work get delayed?
- Where is information entered more than once?
- What happens when the designated person is unavailable?
- What informal workarounds have staff created?
- Where does the process work particularly well?

Work shadowing

Follow a staff member or role through part of a workday to understand how demands accumulate. Shadowing may be particularly helpful for roles that other employees or leaders understand less well, such as paraprofessionals, nurses, counselors, office staff, custodians, transportation staff, food-service staff, behavior staff, or administrators.

The important finding may not be one dramatic event. It may be the accumulation of transitions, interruptions, competing responsibilities, emotional demands, physical demands, and limited recovery time.

Environmental walkthroughs

Walk through work settings with staff and ask how the physical environment helps or interferes with their work. Depending on the question, examine:

- noise;
- temperature;
- workspace;
- access to private or quiet space;
- travel between locations;
- location of materials;
- access to bathrooms or break spaces;
- safety;
- technology;
- proximity to needed support; and

- locations where difficult transitions repeatedly occur.

Ask staff to interpret what you observe. Do not assume the design team can determine the meaning of the physical environment simply by looking at it.

Existing operational information

Observation can also include reviewing documentation from routine work that is taking place in the school, such as:

- schedules;
- meeting calendars;
- coverage records;
- caseloads;
- referrals;
- requests for assistance;
- response times;
- overtime or additional-duty records;
- incident reports;
- work orders;
- required forms;
- active initiatives; or
- training requirements.

Staff experience synthesis

Use this worksheet to bring together what you learned across surveys, listening sessions, observations, organizational information, and other sources. The goal is not to explain why a concern exists or select a solution. At this stage, summarize what appears to be happening, where experiences differ, what is already helping, and which concerns warrant deeper investigation in Phase 3.

You do not need to include every finding. Focus on themes that appear important for understanding staff experience or deciding what deserves further attention. **Do not resolve disagreements too quickly.** If different sources or staff groups tell different stories, record the difference. It may be important information to carry forward.

	Theme 1	Theme 2	Theme 3
Major theme	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
What we heard	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
What we observed or found elsewhere	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Who appears most affected	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Strengths/what already helps	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Important differences or exceptions	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
What we don't understand yet	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Deeper investigation?	☐ Yes ☐ Maybe ☐ No	☐ Yes ☐ Maybe ☐ No	☐ Yes ☐ Maybe ☐ No

Priority selection guide

Back to Phase 3

Use this tool to select **one issue for focused investigation in Phase 3** from the concerns identified during Phase 2.

Step 1. Identify the concerns you are considering

Concern 1: Click or tap here to enter text.

Concern 2: Click or tap here to enter text.

Concern 3: Click or tap here to enter text.

Other: Click or tap here to enter text.

Step 2. Compare what you know

Consider	Concern 1	Concern 2	Concern 3
What did we learn in Phase 2? What evidence suggests this is an important concern?	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Importance: How significantly does this appear to affect staff well-being or their ability to do their work?	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Reach: Who is affected? Is the concern widespread or particularly consequential for certain staff?	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Persistence: Is it temporary, recurring, or longstanding?	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Equity: Are particular roles, groups, shifts, buildings, or circumstances disproportionately affected?	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Influence: What aspects could the school or district realistically change or influence?	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Opportunity Is there a credible opportunity to make progress and learn?	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
What don't we know yet?	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

Step 3. Pause before deciding

Whose perspective is represented in this comparison?

Whose experience could be hidden by schoolwide averages or majority opinion?

Are we favoring a concern because it is easiest to address rather than because it is important?

Are we favoring a concern because leaders already have a preferred solution?

Step 4. Make and document the decision

The issue we will investigate more deeply is:

We selected it because:

Important concerns we are not selecting now:

What will happen to those concerns?

☐ Revisit at a specified time

☐ Refer to another team/process

☐ Continue monitoring

☐ Address through existing work

☐ Other: Click or tap here to enter text.

Staff communication

Complete these sentences before moving on:

We heard _____. We are focusing first on _____ because _____. We have not forgotten _____, and we will _____.

Contributing factors analysis

Back to Phase 3

Part A. Start with the problem

Priority issue: Click or tap here to enter text.

Problem statement:

Who experiences the problem?

When and where does it occur?

Why does it matter?

Part B. What did Phase 2 already tell us?

Information that helps us understand this problem:

What we learned	Information source	What it may suggest
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

Part C. Identify possible contributing factors

Brainstorm first. Evaluate second.

Possible areas to consider include workload and tasks; staffing and coverage; schedules and time; roles and responsibilities; policies and procedures; communication and coordination; leadership and supervision; student needs and support systems; tools, technology, or physical resources; and broader district or policy conditions.

Possible contributing factor	What makes us think this matters?	Current status
Click or tap here to enter text.	Click or tap here to enter text.	☐ Supported ☐ Plausible/uncertain ☐ Assumption
Click or tap here to enter text.	Click or tap here to enter text.	☐ Supported ☐ Plausible/uncertain ☐ Assumption
Click or tap here to enter text.	Click or tap here to enter text.	☐ Supported ☐ Plausible/uncertain ☐ Assumption

Part D. Choose a way to go deeper

Use Five Whys when: there appears to be a reasonably clear chain worth investigating.

Use a fishbone when: several factors may interact and you want to avoid narrowing too quickly.

Compare exceptions when: the problem occurs in some circumstances but not others.

Collect targeted information when: an important explanation is plausible but you do not yet have enough evidence.

OPTIONAL: FIVE WHYS

Problem: Click or tap here to enter text.

Why might this be happening?

Why does that happen?

What contributes to that?

What contributes to that?

What appears to be sustaining this pattern?

Which statements above are supported by evidence?

Which are assumptions?

What would we need to learn before relying on this explanation?

Remember: You do not have to ask "why" exactly five times. Stop when additional questions stop producing useful insight—or when you reach something that needs investigation rather than another guess.

OPTIONAL: COMPARE EXCEPTIONS

When or where is the problem less severe—or absent?

Who experiences the problem differently?

What appears to be different in those situations?

Could any of those conditions help explain the problem or suggest a strength to build on?

Part E. Look across staff experiences

Staff group/context	How does the problem appear here?	Contributing factors that may be different
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

Are we incorrectly assuming that the same problem has the same causes for everyone?

Part F. Summarize what you know

WHAT WE KNOW

The evidence currently supports: Click or tap here to enter text.

WHAT WE THINK

These explanations are plausible but not yet well established: Click or tap here to enter text.

WHAT WE STILL NEED TO LEARN

Before selecting a target or strategy, we need to know: Click or tap here to enter text.

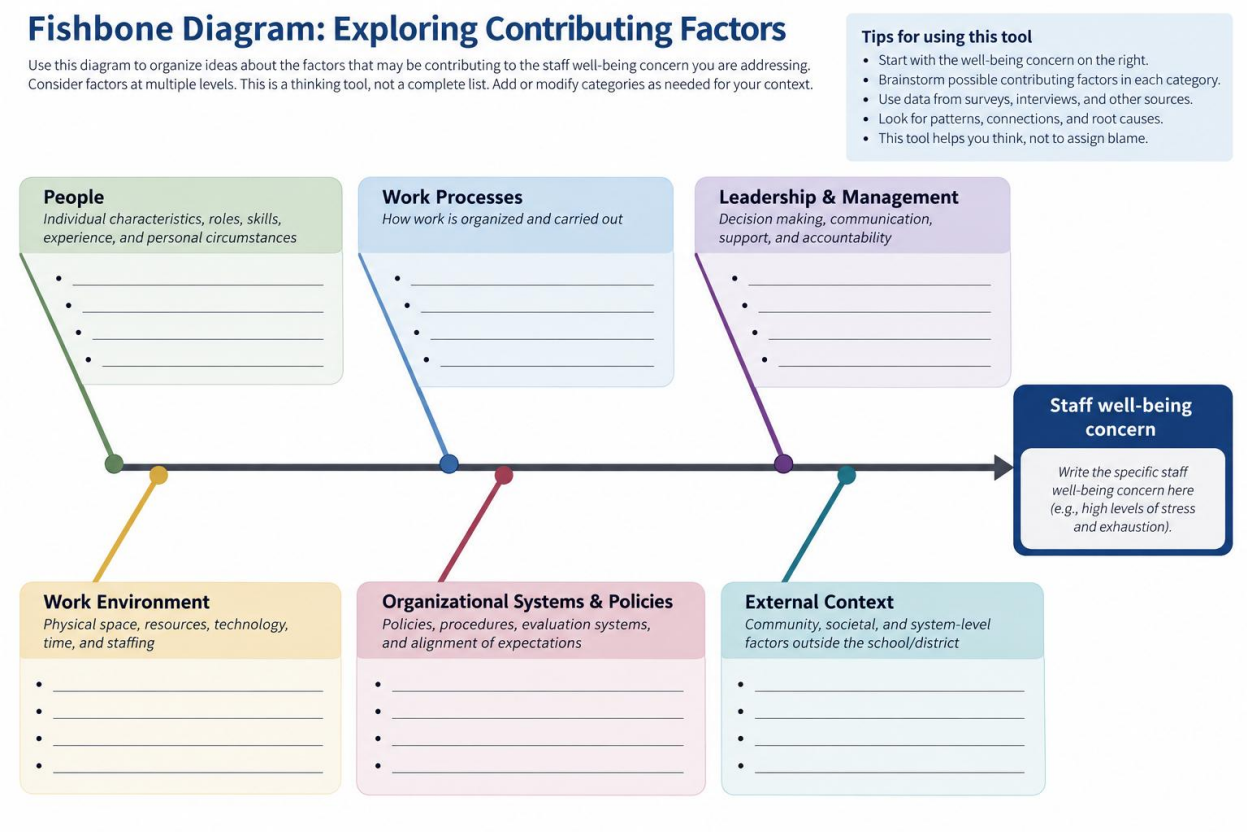
STRENGTHS TO PROTECT OR BUILD ON

Where is the problem less severe? What is already helping? Click or tap here to enter text.

Sample fishbone diagram

Back to Phase 3

Use this diagram as a starting point for thinking about how to structure a fishbone diagram. You can change the categories to best fit with the issue that you are exploring.



Target for change worksheet

Back to Phase 3

Restate the priority problem: Click or tap here to enter text.

What appear to be the most important contributing factors?

Contributing factor	Evidence supporting it	How important does it appear to be?
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

What can we influence?

Sort the major contributing factors.

We can change directly	We can influence, but need others	We currently have little control over
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

Do not automatically choose the easiest factor. Consider whether changing it is likely to make a meaningful difference.

Consider possible targets

Possible target for change	Why might changing this help?	Who would be affected?	What concerns do we have?
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

Select the target

Our target for change is: Click or tap here to enter text.

A strong target describes **what should be different**, without prescribing exactly how you will make it different.

Test the logic

Complete this statement:

If we can change _____, we expect _____ to improve because _____.

What evidence supports this reasoning?

What are we assuming?

What could make our reasoning wrong?

Equity check

Who is likely to benefit if this condition changes?

Who may benefit less—or not at all?

Could changing this condition shift work, burden, inconvenience, or risk to another staff group?

Feasibility check

Who has authority to change this condition?

What resources or cooperation would be required?

Is this target sufficiently important to justify those requirements?

☐ Yes
☐ Probably, but we need more information
☐ No—reconsider target

Target statement

At the end, the team should be able to say:

Our priority is _____. We believe _____ is an important contributing factor. Our target is to _____. We expect this to help because _____.

Strategy evidence & fit guide

Back to Phase 3

Our priority: Click or tap here to enter text.

Our target for change: Click or tap here to enter text.

Potential strategies

Identify no more than a few serious options.

	Strategy A	Strategy B	Strategy C
How would this address our target?			
Evidence that the target matters			
Evidence for this particular strategy			
Who has been studied?			
How similar are those settings/populations to ours?			
What does the evidence not tell us?			
Fit with staff experience from Phase 2			

	Strategy A	Strategy B	Strategy C
Fit with local context			
Resources required			
Time/work required from staff			
Leadership/organizational support needed			
Potential equity implications			
Possible unintended consequences			
What would have to be true for this to work?			

Three evidence questions

	Strategy A	Strategy B	Strategy C
Does the target matter? Is there evidence that this condition is related to staff well-being or another important outcome?			
Has the strategy been tested? Is there evidence that this approach changes the target or			

	Strategy A	Strategy B	Strategy C
improves relevant outcomes?			
What remains uncertain? Consider population, setting, durability, equity, implementation, and unintended effects.			

Compare fit

	Strategy A	Strategy B	Strategy C
Reasons this may be a good fit here			
Reasons to be cautious			
Things we would need to adapt			
Things we would need to learn through a pilot			
DECISION	☐ **Pursue** – strong evidence/rationale and fit to consider testing ☐ **Hold** – promising, but important questions need to be answered first ☐ **Do not pursue now** – insufficient rationale, poor fit, excessive burden, or other concern	☐ **Pursue** – strong evidence/rationale and fit to consider testing ☐ **Hold** – promising, but important questions need to be answered first ☐ **Do not pursue now** – insufficient rationale, poor fit, excessive burden, or other concern	☐ **Pursue** – strong evidence/rationale and fit to consider testing ☐ **Hold** – promising, but important questions need to be answered first ☐ **Do not pursue now** – insufficient rationale, poor fit, excessive burden, or other concern

Selected strategy

We propose testing: Click or tap here to enter text.

Because: Click or tap here to enter text.

The most important assumptions we need to test are: Click or tap here to enter text.

Potential unintended effects we need to watch for: Click or tap here to enter text.

Staff groups whose experience we particularly need to monitor: Click or tap here to enter text.

Assumptions & learning questions

Back to Phase 4

Most important things the team needs to learn from the pilot.

Priority: Click or tap here to enter text.

Target for change: Click or tap here to enter text.

Strategy to be tested: Click or tap here to enter text.

Complete: We believe that if we _____, then _____ will improve because _____.

What must be true?

Important assumption	How certain are we?	How important is it?	Do we need to test it?
Click or tap here to enter text.	☐ High ☐ Medium ☐ Low	☐ High ☐ Medium ☐ Low	☐ Yes ☐ No
Click or tap here to enter text.	☐ High ☐ Medium ☐ Low	☐ High ☐ Medium ☐ Low	☐ Yes ☐ No
Click or tap here to enter text.	☐ High ☐ Medium ☐ Low	☐ High ☐ Medium ☐ Low	☐ Yes ☐ No
Click or tap here to enter text.	☐ High ☐ Medium ☐ Low	☐ High ☐ Medium ☐ Low	☐ Yes ☐ No

Prioritize assumptions that are **important and uncertain.**

Learning questions

By the end of the pilot, what do we most need to know?

Predictions

Before testing, what do we expect to happen?

What result would surprise us?

Pilot plan

Back to Phase 4

Strategy: Click or tap here to enter text.

What specific part are we testing?

What do we hope to learn?

Pilot scope

Who will participate?

Where?

When?

For how long?

Who will carry out the strategy?

Who will support them?

What needs to be in place?

Needed	Who is responsible?	Ready?
Time	Click or tap here to enter text.	☐
Communication	Click or tap here to enter text.	☐
Training/orientation	Click or tap here to enter text.	☐
Materials/tools	Click or tap here to enter text.	☐
Leadership support	Click or tap here to enter text.	☐
Other	Click or tap here to enter text.	☐

Conditions we need to encounter

What realistic circumstances should occur during the pilot so that the test tells us something useful?

What could make the pilot difficult?

How will participants provide feedback or raise problems?

Under what circumstances would we change or stop the pilot early?

Pilot data plan

Back to Phase 4

Learning question	What will tell us?	Source?	When/how often?	Who collects/ reviews?
Did we implement it?	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Did the target change?	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Did staff experience improvement?	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Did we create unintended effects?	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Did experiences differ meaningfully?	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

Measures

PROCESS — Did the strategy happen as intended?

OUTCOME — Did the condition we wanted to improve actually change?

BALANCING — What might have become worse or more burdensome as a result?

Burden check

How much work will data collection require?

Can we use information already generated through normal work?

Which proposed data could we eliminate without weakening the decision?

Pilot learning & decision record

What did we test?

What did we expect?

What happened?

Learning question/ assumption	Expected	Observed	What did we learn?
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

Staff experience

What did participants say helped?

What remained difficult?

What should change?

Differences

For whom did the strategy appear to work particularly well?

For whom did it work less well?

Under what conditions did it work differently?

Unintended effects

What benefits did we not anticipate?

What problems or burdens did we not anticipate?

Did work or burden shift to someone else?

Decision

☐ KEEP — retain as designed

☐ ADAPT — modify and test revised approach

☐ TEST AGAIN — more learning needed

☐ EXPAND TEST — test with more people/conditions

☐ MOVE TO IMPLEMENTATION PLANNING

☐ RETURN TO PHASE 3 — reconsider target/contributing factors

☐ STOP

Why?

What happens next?

Core components & adaptation guide

Back to Phase 5

Priority concern: Click or tap here to enter text.

Target for change: Click or tap here to enter text.

Well-being strategy: Click or tap here to enter text.

Core purpose

What is this strategy intended to change, and why should that matter?

Strategy definition

Component	What purpose does it serve	How flexible is it?
Click or tap here to enter text.	Click or tap here to enter text.	☐ Core ☐ Adaptable ☐ Still learning
Click or tap here to enter text.	Click or tap here to enter text.	☐ Core ☐ Adaptable ☐ Still learning
Click or tap here to enter text.	Click or tap here to enter text.	☐ Core ☐ Adaptable ☐ Still learning
Click or tap here to enter text.	Click or tap here to enter text.	☐ Core ☐ Adaptable ☐ Still learning

Guardrails

What should not be changed or allowed to happen as the strategy is adapted?

What unintended burden or harm are we particularly trying to avoid?

Implementation context & readiness scan

Back to Phase 5

For each area, identify what is likely to **help**, what may **get in the way**, and what needs attention before or during implementation.

Area	What will help?	What could get in the way?	What needs attention?
Strategy	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
People	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Team & relationships	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Leadership	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Workflow & systems	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Resources & capacity	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Broader context	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

Reassess readiness

What conditions have changed since Phase 1?

Which conditions that supported the pilot may not be available at broader scale?

What strengths can we build on?

What could seriously compromise implementation if we do not address it?

Are we ready to expand?

☐ Yes
☐ Yes, while addressing identified barriers
☐ Not yet—strengthen conditions first

Barriers to support planner

Back to Phase 5

Important barrier	Why does it matter?	Support that might address it?	Who can provide/ change this?	How will we know if it helped?
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

Check the match

For each proposed implementation support, ask:

What barrier is this intended to address?

Why do we expect this support to help?

Does it address the actual problem—or simply provide more information or training?

What burden will the support create?

Can it be integrated into existing work?

Implementation, monitoring & adaptation plan

Back to Phase 5

What are we implementing?

Well-being strategy: Click or tap here to enter text.

Core purpose: Click or tap here to enter text.

Who should experience the change? Click or tap here to enter text.

Implementation responsibilities

What needs to happen?	Who is responsible?	What support is needed?	When?
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

Communication

What do staff need to know?

How will we explain what was learned during the pilot and why the strategy is expanding?

How can staff report implementation problems or suggest adaptations?

Monitoring

Question	Indicator/ information	Source	How often?	Who reviews it?
Did we do it?	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Did it reach intended staff?	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Did it help?	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
What else happened?	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Who benefited or experienced burden?	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

Adaptation log

What changed?	Strategy, support, or setting?	Why?	What happened?	Keep it?
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

Regular learning questions

What is working as expected?

Where is implementation breaking down?

For whom is the experience different?

What burden are we creating, removing, or moving?

What should we change next?

Sustainment & next decision review

Back to Phase 5

Is the strategy still worth doing?

What benefit are we seeing?

Who is benefiting? Who is benefiting less?

What burden or cost does the strategy create?

Is the strategy still addressing an important need?

How well is it embedded?

Sustainment condition	In place?	What still needs attention?
Roles and responsibilities are clear	☐ Yes ☐ Partly ☐ No	Click or tap here to enter text.
Necessary time is built into normal work	☐ Yes ☐ Partly ☐ No	Click or tap here to enter text.
Needed resources are available	☐ Yes ☐ Partly ☐ No	Click or tap here to enter text.

Sustainment condition	In place?	What still needs attention?
Policies/procedures support the strategy	☐ Yes ☐ Partly ☐ No	Click or tap here to enter text.
New staff can learn the approach	☐ Yes ☐ Partly ☐ No	Click or tap here to enter text.
Leadership responsibilities are clear	☐ Yes ☐ Partly ☐ No	Click or tap here to enter text.
Essential monitoring/feedback will continue	☐ Yes ☐ Partly ☐ No	Click or tap here to enter text.
Strategy can survive key personnel changes	☐ Yes ☐ Partly ☐ No	Click or tap here to enter text.

What should happen next?

☐ CONTINUE

☐ EXPAND

☐ ADAPT

☐ REDUCE

☐ REPLACE

☐ STOP / DE-IMPLEMENT

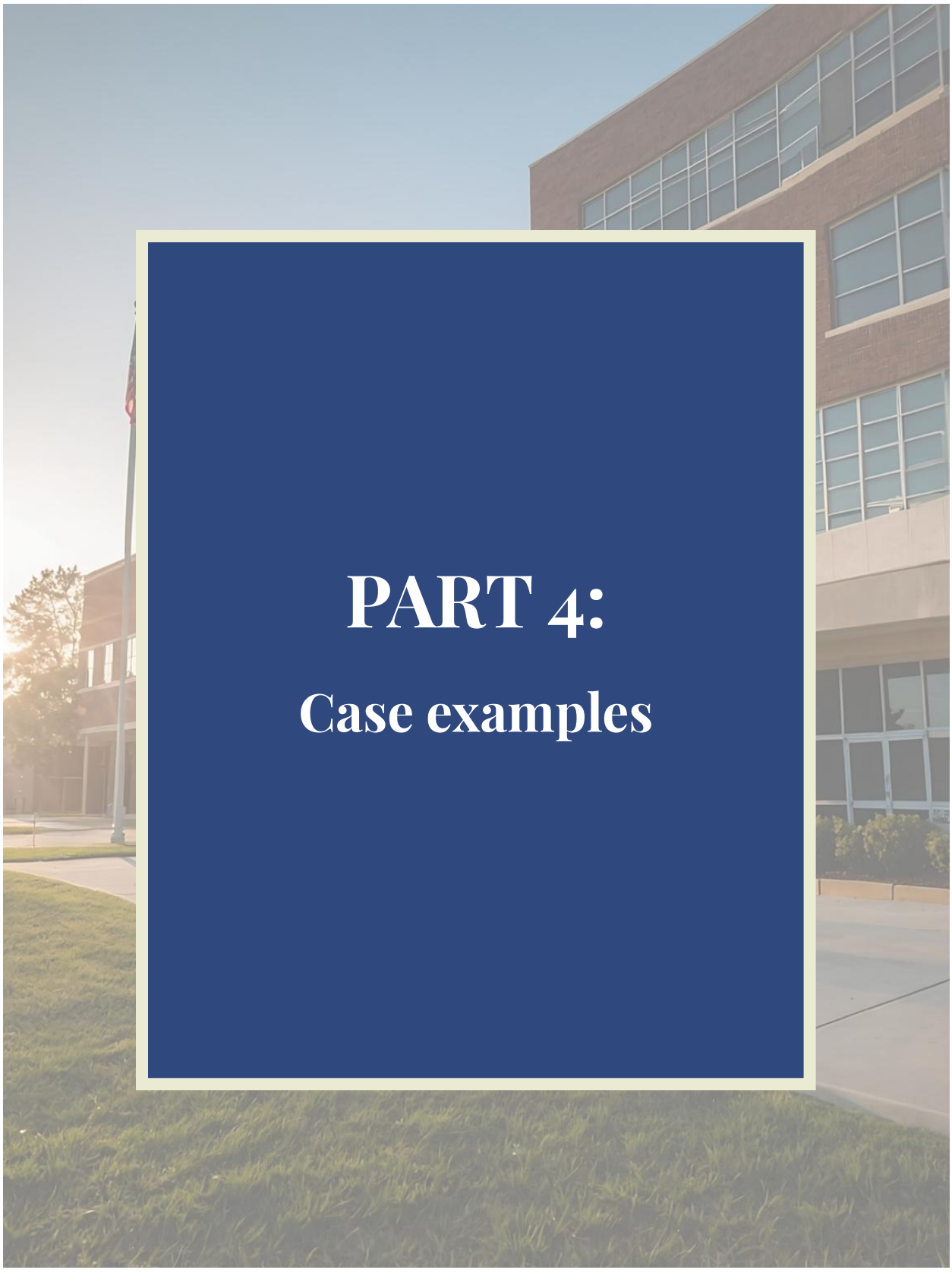
Why?

What will we preserve?

What will change or stop?

Who needs to be involved in this decision?

When will we review the decision again?



PART 4:

Case examples

Example 1: Oak Ridge Elementary School

Phase 1

Oak Ridge Elementary is a K–5 school serving approximately 500 students. The school has experienced relatively stable staffing and generally positive relationships among staff and administrators, but teachers have become increasingly concerned about the amount of work spilling beyond the school day.

At a staff meeting, several teachers raise concerns about not having enough time during the workday to plan and complete their work. Teachers describe regularly working evenings and weekends to prepare lessons, grade student work, communicate with families, complete documentation, and manage other responsibilities. Several describe their existing planning periods as frequently interrupted or consumed by meetings and other responsibilities.

The conversation generates considerable agreement, though staff are less certain whether planning time is the most important issue affecting their well-being. Rather than assuming that the concern raised most visibly at one meeting represents everyone's experience, school leaders agree to use it as a starting point for a broader staff well-being process.

A small group of teachers and administrators completes the readiness assessment. They identify several strengths. Staff generally trust one another, there is a history of teachers and administrators working together on school improvement efforts, and both staff and leaders agree that staff stress deserves attention. The school also has existing structures for gathering staff input and a regular improvement-team meeting that could support some of the work.

The assessment also reveals an important challenge: administrators are hesitant about how much can realistically change. They point to contractual requirements, required instructional minutes, existing meetings, staff coverage needs, and district expectations. Some worry that inviting staff to examine planning time will create expectations the school cannot meet.

Rather than treating these constraints as a reason not to proceed - or promising changes that may not be possible - the group begins distinguishing between constraints that are fixed and those that may be more flexible. Some requirements truly cannot be changed locally. Others reflect longstanding routines or assumptions that have simply never been reconsidered.

Leaders are not comfortable promising additional planning time. However, they will commit to understanding staff experiences and exploring what may be possible.

Oak Ridge creates a small design team representing different grades and roles, including classroom teachers, a special education teacher, a specialist, student support staff, and an administrator. The school deliberately avoids selecting only those staff who were most vocal about regularly working extra hours at home. They include one staff member who generally manages within existing planning time, a specialist whose schedule operates very differently from classroom teachers, and staff whose planning periods are particularly vulnerable to interruptions and coverage needs.

Once formed, the team establishes a clear understanding of their role. They clarify that their job is not to prove that teachers need more planning time or to defend the existing schedule. Instead, its first responsibility will be to better understand when, where, and why staff experience difficulty completing their work.

The design team also identifies perspectives not represented among its members. They commit to seeking those perspectives during the next phase rather than expanding the size of the team.

Where the team is now: Oak Ridge has a concern worth exploring, leadership permission to examine both constraints and possibilities, and a team prepared to learn more. What it does not yet know is whether insufficient planning time is the central problem—or what is actually consuming the time staff have.

Phase 2

Oak Ridge entered Phase 2 with a visible concern about planning time, but the design team had deliberately avoided assuming that this was either the most important staff well-being issue or a problem with a single cause.

The team begins by reviewing what it already knows. The master schedule shows that classroom teachers have scheduled planning periods, but the schedule alone cannot show whether that time is reliably usable. The team therefore includes several questions about workload and time in a short schoolwide staff survey.

Teachers frequently identify completing work outside the school day as a concern, but the findings are not uniform. Some classroom teachers report substantial difficulty protecting planning time. Specialists describe different scheduling pressures. Special education staff

identify documentation and meetings as particularly significant demands. Other staff identify concerns unrelated to planning time.

To learn more about these results, the team conducts several listening sessions. They ask staff to describe recent days when they could not complete essential work during scheduled hours, as well as days when they could complete their work.

A pattern begins to emerge. Staff technically have planning time, but its usability varies. Some periods are interrupted by student needs, informal requests, meetings, coverage, or communication that cannot easily occur at another time.

The team wants to understand the pattern more concretely, but do not want to ask staff to complete a lengthy time study. A smaller volunteer group keeps an interruption log for one week, noting when scheduled planning time is interrupted, why, and what happens to the displaced work. The team also looks for exceptions. Some grade-level teams appear better able to protect planning time than others. Interviews reveal that they have developed clearer informal routines about what constitutes an urgent interruption and where nonurgent requests should go.

By the end of Phase 2, Oak Ridge has learned something more useful than "teachers want more planning time." Its priority becomes **predictable, usable time for staff to complete essential work**. The team has not yet concluded what causes the loss of usable time or what should change. Those questions move into Phase 3.

Where the team is now: Oak Ridge has moved away from a proposed solution of increasing planning time. They have an increased understanding that scheduled planning time is not always usable time. The next task is to understand what is producing that problem and which factors are most changeable.

Phase 3

Oak Ridge enters Phase 3 with a clearer concern than it started with: Staff need predictable, usable time to complete essential work.

The team first confirms that this issue should remain its priority. Phase 2 showed that completing work outside the school day is common among classroom teachers, that scheduled planning time is not always usable, and that interruptions and lost planning periods are particularly important for some staff. At the same time, the team recognizes that specialists and special education staff experience somewhat different time pressures.

Rather than concluding that the school simply needs "more planning time," the team develops a more specific problem statement: Many classroom teachers have scheduled planning time, but that time is not reliably available for planning. When it is interrupted or reassigned, necessary work is frequently displaced to evenings or weekends.

The team uses a simple contributing-factors map. It identifies several possibilities: coverage assignments, meetings, student needs, informal interruptions, family and colleague communication, and the amount of work teachers are expected to complete during planning periods.

Some factors are already supported by the Phase 2 interruption logs. Others remain assumptions. One finding stands out. Coverage does not account for every interruption, but when a teacher is assigned coverage, an entire planning period is typically lost. The problem is particularly pronounced on days when substitute positions go unfilled.

The team asks why. A Five Whys discussion initially produces several theories about substitute availability, but members recognize that they do not yet know whether those explanations are correct. They examine recent absence and coverage information instead. The pattern confirms that unfilled absences are an important source of lost planning time, although not the only one.

The team also returns to an important strength identified in Phase 2. Some grade-level teams have developed norms that protect planning periods from nonurgent interruptions. Those practices appear worth preserving and potentially spreading.

Oak Ridge identifies its initial **target for change**: Reduce preventable loss of scheduled planning time, particularly loss caused by routine coverage and nonurgent interruptions.

The team considers several strategies. Adding more planning periods would be expensive and would not necessarily protect them. A more targeted combination appears more promising: strengthen coverage capacity while establishing clearer schoolwide expectations about when planning time should—and should not—be interrupted. The team is not yet assuming that this will solve after-hours work. That becomes an important assumption to test in Phase 4.

Where the team is now: Oak Ridge has moved from *"teachers need more planning time"* to a testable theory: making existing planning time more reliably usable may reduce the amount of essential work displaced beyond the school day.

Phase 4

Oak Ridge enters Phase 4 with a testable theory: making existing planning time more reliably usable may reduce the amount of essential work that classroom teachers must complete outside the school day. Phase 3 identified two promising targets—routine coverage assignments and nonurgent interruptions—but the team does not yet know whether addressing them will make enough difference to matter.

The team identifies several things it needs to learn. Can more planning periods actually be protected? Can staff distinguish urgent needs from requests that can wait or be routed elsewhere? Most importantly, if planning time becomes more usable, does less work spill into evenings and weekends? The team also wants to make sure that protecting teachers' time does not simply shift interruptions and additional work to office staff, paraprofessionals, or student-support staff.

Rather than changing procedures across the entire school, Oak Ridge begins with a small pilot involving two grade-level teams. The school establishes clearer expectations that scheduled planning periods should not be used for routine coverage except when other options have been exhausted. Staff also develop simple examples of requests that require an immediate interruption and those that can be handled through another route or at another time.

The team deliberately keeps measurement manageable. It tracks how often planning periods are lost or significantly interrupted, asks participating teachers whether they were able to complete more essential work during scheduled hours, and periodically checks how much work is still spilling beyond the school day. Office and support staff are also asked whether the new process is creating additional work for them.

Early results are encouraging but imperfect. Teachers experience fewer interruptions and report that planning periods feel more predictable. After-hours work decreases for some teachers, although it does not disappear. The pilot also reveals a problem: when nonurgent requests are redirected, office staff sometimes become the default destination. The school has protected one group's time partly by increasing demands on another.

The team adjusts the routing process. Rather than sending all nonurgent requests to the office, staff clarify which requests can wait, which have another appropriate destination, and which do not require action at all. They test the revised approach for several more weeks.

At the end of the pilot, Oak Ridge decides to keep and expand the planning-time protections, modify the routing process, and continue testing the coverage strategy. The team also recognizes an important limit to its theory: protecting planning time helps, but it cannot address every reason staff work outside scheduled hours.

What Oak Ridge learns: A promising strategy can improve the original problem and still create new burdens elsewhere. Looking for those effects during a pilot allows the team to address them before expanding the strategy.

Phase 5

Oak Ridge now has a strategy worth implementing more broadly, but the team first defines what needs to remain consistent. The core function is not a particular routing procedure. It is to make scheduled planning time reliably usable while preserving timely responses when needs truly are urgent. Specific routing arrangements can vary as long as those functions are protected.

The team then reassesses context and readiness. The pilot involved two relatively cohesive grade-level teams. Schoolwide implementation will involve staff with different schedules, responsibilities, and access to planning time. New staff may not know the expectations, teams may define "urgent" differently, and coverage pressures remain particularly difficult when substitute positions go unfilled.

Oak Ridge matches implementation supports to those barriers. Staff co-develop examples of urgent and nonurgent interruptions, the school creates a brief job aid, team leaders reinforce the expectations in existing meetings, and the process becomes part of new-staff orientation. Responsibility for resolving recurring implementation problems is assigned rather than left ambiguous.

As the strategy expands, the team continues monitoring whether planning periods are actually protected—not merely whether staff know the new expectations. It also continues to examine after-hours work and the burden experienced by office and support staff. When one team develops a routing approach that works better for its circumstances, the school allows that adaptation because it preserves the strategy's core function.

Over time, planning-time protections become part of ordinary school routines. The team reduces the frequency of formal monitoring but does not stop paying attention altogether. It periodically checks whether planning time remains usable and whether burden is accumulating somewhere else.

Oak Ridge also keeps an important boundary around its conclusion. The strategy has reduced one contributor to after-hours work; it has not solved workload as a whole. Other contributors may require different strategies.

What Oak Ridge learns: Sustaining a strategy means preserving what makes it useful while allowing the details to adapt—and continuing to ask whether benefits for one group are creating burdens for another.

Example 2: Riverview Middle School

Phase 1

Riverview Middle School's principal has become increasingly concerned about staff morale. Teachers and other staff frequently describe feeling overwhelmed, participation in optional school activities has declined, and even relatively small new initiatives are being met with complaints and frustration. The principal interprets much of this as a problem of workload and competing demands.

Wanting to help, the principal dedicates part of a professional development day to strategies for time management and personal organization. The response is not what she expects. Staff evaluations are unusually negative. Several employees say that they already know how to manage their time; the problem, from their perspective, is that there are more expectations than can reasonably fit into the time available. Some experience the training as suggesting that their stress results from personal inefficiency.

The experience causes the principal to reconsider her approach. Rather than selecting another solution, she proposes a more comprehensive staff well-being process to understand what is contributing to workload and whether there are opportunities to reduce, eliminate, combine, or streamline demands.

The principal supports moving forward, but also has significant reservations. She worries that the process could become just an extended opportunity for staff to complain. She believes that demanding workloads are to some extent inherent in public education. She also knows that the school cannot afford substantial additional staffing and worries about inviting recommendations that cannot be implemented.

Initial conversations therefore focus on what the process is and is not intended to accomplish. The goal is not to promise that every workload concern can be eliminated. Nor is it to determine whether staff complaints are justified before hearing them. The goal is to understand the demands staff experience, identify their sources, and distinguish among conditions the school can control, influence, or may need to work around.

The principal also reflects on the unsuccessful time-management training. Although well intended, the school selected a solution before adequately understanding the problem. She agrees that the next stage should begin with listening rather than another predetermined intervention. This does not eliminate all of her concerns, but it provides enough leadership support to proceed.

Riverview forms a design team that includes classroom teachers, paraprofessionals, student support staff, administrative/office staff, and administrators. Members have different levels of experience and work in different parts of the school.

During the team's formation, an important issue becomes apparent. “Workload” does not mean the same thing across staff roles. Teachers talk about grading, planning, family communication, and instructional expectations. Paraprofessionals describe intensive student-facing responsibilities and limited control over their schedules. Student support staff juggle direct services, crisis response, meetings, and documentation. Administrative staff describe interruptions and competing requests from throughout the building.

The team establishes an early norm: the process will not become a competition over who has it hardest. Different staff groups may experience different pressures, and understanding those differences is part of the work. The team also agrees to distinguish between understanding a problem and promising to solve every aspect of it. This allows staff to raise concerns even when the solution (or the school's authority to address it) is not yet clear.

Where the team is now: Riverview has learned one important lesson already: a plausible solution can fail when it is based on an incomplete understanding of the problem. The design team is ready to investigate what staff mean when they say their workload has become unmanageable.

Phase 2

Riverview begins Phase 2 with a broad concern about workload. Staff have already rejected the implication that better personal organization is likely to solve the problem, but “workload” is still too broad to guide action.

The design team reviews existing information before collecting anything new. It inventories major initiatives, recurring meetings, required documentation, professional-learning expectations, and other organizational requirements. The inventory is not intended to prove that any particular activity is unnecessary. It simply gives the team a picture of the work that has accumulated.

They conduct a short staff survey that asks which aspects of work most interfere with employees' ability to complete their essential responsibilities and which demands most often spill beyond scheduled work time.

No single task dominates. Instead, staff repeatedly describe **accumulation**: several individually reasonable expectations that become difficult when combined.

Listening sessions deepen the picture. Staff describe new initiatives being introduced while previous practices remain in place, documentation added for legitimate reasons but rarely reconsidered, meetings with overlapping purposes, and small administrative requirements distributed across the week.

The team then asks staff to walk through a typical high-demand week. Rather than counting every minute, participants identify major required activities, when they occur, and what work gets displaced.

The exercise reveals another important difference. Some demands affect nearly everyone, while others fall heavily on particular roles. Staff responsible for specialized documentation, coordination, or student support carry work that is largely invisible to colleagues.

The team also identifies strengths. Staff generally understand why many individual requirements exist, and several departments have already simplified local routines without apparent negative consequences.

By the end of Phase 2, Riverview does not select "reduce workload" as its solution. Instead, its priority becomes: Preventable workload accumulation and the organization's difficulty stopping, reducing, or simplifying existing work as new demands are introduced.

Where the team is now: Riverview has moved from a diffuse feeling of overload toward a more focused organizational question. Phase 3 will examine which processes appear to produce accumulation and what might reasonably be changed.

Phase 3

Riverview enters Phase 3 knowing that staff workload concerns do not appear to stem from one unusually burdensome task. Phase 2 instead revealed **accumulation**: meetings, documentation, initiatives, communication, and other individually defensible requirements combine to create an unmanageable whole. Different roles also carry different forms of less-visible work.

The team prioritizes workload accumulation because it is widespread, persistent, and repeatedly described as interfering with staff members' ability to complete essential responsibilities. Its problem statement becomes: Staff across several roles report that accumulated organizational requirements leave insufficient time for essential work, with some responsibilities routinely extending beyond scheduled work time.

A fishbone diagram is more useful here than Five Whys because there is no obvious single causal chain. The team maps possible contributors: recurring meetings, documentation, data collection, professional-learning requirements, new initiatives, communication expectations, student-support responsibilities, and work that continued after its original purpose had changed.

Then members mark each factor as supported by evidence, plausible but uncertain, or currently an assumption. An important pattern emerges. No one requirement explains the problem. Instead, Riverview has repeatedly **added work without systematically reconsidering existing work**.

The team initially considers making meetings shorter and reducing documentation. Both might help, but members realize that addressing one requirement at a time could leave the larger pattern intact.

They identify a broader target: Reduce the accumulation of organizational requirements that add work without a corresponding review of existing demands.

Part 2 points them toward workload redesign and organizational change/competing demands. The team considers creating a process through which significant new initiatives and requirements include a workload-impact review: What new work will this create? Who will do it? When? What existing work can be reduced, combined, or discontinued?

They also decide that the pilot should include a review of a small number of current requirements rather than merely applying the process to future initiatives. The team deliberately does not attempt to redesign every meeting, form, initiative, and documentation requirement at once. Its first test needs to be small enough to learn from.

Where the team is now: Riverview has moved from *"there is too much work"* to a more specific organizational pattern: work is routinely added without reconsidering cumulative demand. Phase 4 will test whether a structured workload review can produce meaningful reductions without eliminating work that staff or students actually need.

Phase 4

Riverview enters Phase 4 with a different kind of strategy. Phase 3 showed that its workload problem does not appear to result from one especially burdensome requirement. Work has accumulated because new expectations are routinely added without a corresponding process for reconsidering what staff are already being asked to do. The team therefore wants to test a structured **workload-impact review** rather than trying to redesign every meeting, form, initiative, and requirement at once.

The team identifies its central learning question: **Can a structured review help the school make meaningful workload tradeoffs, rather than simply documenting that staff are busy?**

For the pilot, Riverview applies the process to one proposed initiative and a small number of existing requirements. For each, the team asks: What work does this create? Who will do it? When will they do it? What existing work could be stopped, reduced, simplified, combined, or delayed?

At first, the process works less well than expected. Participants can readily identify workload implications, but they hesitate when asked what should stop. Some requirements originated outside the school. Others have a legitimate purpose even if the process used to meet them is burdensome. In several cases, the people completing the review do not have authority to eliminate the work.

The team realizes that its original assumption was incomplete. **Identifying workload is not the same as having the authority to change it.**

Riverview modifies the pilot so that someone with appropriate decision-making authority participates when consequential tradeoffs are being considered. The team also distinguishes requirements that are truly fixed from those that staff have simply assumed cannot change.

The revised process produces more useful decisions. One reporting requirement is simplified, two meetings with overlapping purposes are combined, and another activity is retained because staff conclude that its value justifies the time it requires. The goal is not to eliminate everything staff dislike; it is to make workload an explicit consideration when organizational decisions are made.

Staff identify another risk, however: the workload review itself could become one more bureaucratic requirement. The team therefore shortens the process and establishes criteria for when a formal review is warranted.

At the end of Phase 4, Riverview decides to **keep the decision process but simplify it before broader implementation**.

What Riverview learns: Workload review matters only if it can lead to real tradeoffs. A process that identifies burden but cannot change anything may simply add another task.

Phase 5

Riverview defines the strategy's core function as ensuring that consequential new requirements are considered in the context of existing workload. The essential element is not a particular form. It is a decision process that asks what work will be added, who will do it, when it will occur, and what existing work can be reduced or discontinued. Minor routine changes do not require a formal review.

When the team reassesses context, **decision authority** emerges as both a major facilitator and a potential barrier. Leaders can make some changes locally, but not all requirements originate at the school level. Competing initiatives also make it easy for cumulative workload to disappear from view.

Implementation supports therefore focus less on training staff to complete a form and more on helping leaders make genuine tradeoffs. Riverview develops a short decision guide, establishes thresholds for when a review is needed, and incorporates workload considerations into existing leadership planning rather than creating a separate well-being process.

Monitoring reveals another pattern. Leaders reliably use the process for large new initiatives, but workload can still accumulate through many small requirements introduced at different times and by different people. Riverview responds by adding a brief cumulative workload review twice each year rather than creating a more elaborate approval system.

Over time, workload review becomes part of ordinary organizational planning. Some earlier documentation and meeting requirements are deliberately discontinued. Others remain because the school determines that their benefits justify their burden.

The school continues to ask whether the process itself is worth maintaining. If it becomes a compliance exercise that generates paperwork without changing decisions, it will no longer be serving its purpose.

What Riverview learns: Preventing workload accumulation requires an organization to become better not only at evaluating new work, but also at **stopping existing work**. De-implementation is part of staff well-being, too.

Example 3: North Valley K-8 School

Phase 1

By the middle of the school year, staff at North Valley K–8 School are increasingly concerned about student behavior. Teachers and paraprofessionals describe frequent disruptions that interfere with instruction, repeated office referrals, and situations in which individual students require substantial attention while other students are waiting to learn.

Staff frustration is growing. Some teachers say they feel exhausted before the school day is over. Others describe spending significant instructional time responding to behavior and then using planning time to catch up on work they could not complete. Staff discussions increasingly include questions such as, "What are we supposed to do when nothing we're trying is working?"

School leaders initially discuss whether the school needs a new behavior-management initiative. But the school is already implementing several major initiatives, and staff have little appetite—or capacity—for another comprehensive program.

Leaders also recognize that the concern has implications for both student support and staff well-being. Framing the situation only as a student discipline problem could overlook what staff need to do their jobs effectively. Framing it only as a staff stress problem could imply that employees simply need better coping strategies.

The school's readiness assessment reveals an unusual combination: motivation is high, but capacity is low. Staff and leaders agree that the problem matters and that current conditions are difficult to sustain. There is little need to persuade people that action is warranted. At the same time, staff are tired, several other improvement efforts are underway, and the school has limited time available for another major initiative.

The assessment changes how leaders think about proceeding. Rather than asking, "Are we ready to overhaul our approach to student behavior?" they ask, "What is a manageable question we have enough capacity to explore well?" They narrow the initial scope to understanding what staff need when student behavior exceeds what they can reasonably manage themselves. This does not assume that the ultimate solution is additional

administrative response, a new behavior program, more training, or something else. It simply creates a feasible starting point. Leadership agrees to protect a modest amount of time for the work rather than adding another large initiative to staff responsibilities.

North Valley forms a team that includes classroom teachers, paraprofessionals, special education staff, student support professionals, and administrators. Members work with students in classrooms, hallways, lunch and recess settings, specialized programs, and administrative settings.

The range of perspectives quickly proves important. Design team members realize that they do not necessarily see the same behaviors, experience the same situations, or have access to the same supports. What appears from one vantage point to be a classroom-management issue looks very different to someone who works with the same student in another setting.

The team establishes several norms: be curious before assigning causes; distinguish what we know from what we assume; and avoid blaming individual students, families, or staff. The purpose is to understand the conditions surrounding difficult situations and what staff experience when they need assistance. Because staff capacity is already strained, the team also commits to keeping meetings focused and being selective about what it asks other staff to do.

Where the team is now: North Valley has strong motivation but limited capacity. By narrowing the question and bringing together people who encounter student behavior in different contexts, the school has created a feasible starting point without assuming it already understands either the problem or the solution.

Phase 2

North Valley enters Phase 2 with limited capacity and a deliberately narrow learning question. Rather than asking a broad question or many individual questions, they focus on learning what staff experience when student needs exceed what they can reasonably manage themselves.

The design team first gathers broad input across roles. Survey questions ask staff whether they know where to seek help, whether support is available when needed, and whether roles and response expectations are clear.

Results vary substantially. Classroom teachers describe difficulty during particular types of escalation. Paraprofessionals describe situations in which they are uncertain who has authority to make a decision. Staff working in lunch, recess, hallways, and specialized settings describe support pathways that differ from those available in classrooms. Student-support staff report that they are often simultaneously responding to several needs.

The team conducts role-specific listening sessions so staff can describe situations candidly. Rather than asking, "Do administrators respond quickly enough?" facilitators ask staff to walk through recent events. Sample questions included: What happened? When did you realize you needed additional help? What did you do? What happened next? How long did you wait? What did you do while waiting?

The team then maps the response process from the moment a staff member needs help through request, response, action, and follow-up. The official process appears straightforward. Actual practice is more variable.

Different staff use different routes to request help. Some rely on radios, others call the office, others contact a particular support person directly. During high-demand periods, the same small group of people may be responding to multiple requests. Staff sometimes create workarounds because they are unsure whether help will arrive.

Importantly, the team does not interpret this as evidence that support staff are insufficiently responsive. The process map shows that response depends partly on **capacity and competing demand**. As a result, North Valley's priority becomes: Reliable access to timely support when student needs exceed what staff can reasonably manage within their roles.

Where the team is now: North Valley started with a potentially blaming question, that is, "Why aren't staff getting enough help?" They now have a clearer description of the experience. Phase 3 will investigate the contributing factors, including role clarity, response pathways, capacity, and patterns of demand.

Phase 3

North Valley enters Phase 3 with the priority: Reliable access to timely support when student needs exceed what staff can reasonably manage within their roles.

Phase 2 showed that the problem is not simply that "administrators don't respond quickly enough." Staff use different pathways to request assistance, responsibilities are sometimes unclear, and the same small group of support staff may be responding to several needs simultaneously. Experiences also differ considerably by setting and staff role.

The team develops a problem statement: When student needs escalate beyond what staff can reasonably manage alone, employees do not consistently know how to request additional support or receive a predictable response. Delays and uncertainty are especially common during periods of competing demand.

The team uses the process map developed in Phase 2 as the starting point for root-cause analysis. Several contributing factors appear important: inconsistent request pathways, unclear

expectations about when additional support should be requested, limited response capacity during high-demand periods, uncertainty about who has decision-making authority, and differences in procedures across settings.

At first, some members suggest additional classroom-management training. Phase 2 did not show that staff primarily lacked behavior-management knowledge. In many examples, staff knew what to do initially; the difficulty arose when a situation exceeded what they could reasonably manage themselves. The team decides not to move forward with this strategy, knowing that training is useful when people lack knowledge or skill. It will not create additional response capacity or clarify an inconsistent system.

Instead, the team identifies two closely related targets: Create a clear, consistently understood pathway for requesting additional support, and improve the reliability of response when help is requested.

This leads to several potential strategies: clarify thresholds and roles, establish a consistent request pathway across settings, identify backup response arrangements during high-demand periods, and monitor when demand exceeds available capacity. The team chooses to test a simplified response protocol in one portion of the school day rather than launch a new schoolwide behavior initiative.

Where the team is now: North Valley has moved from *"student behavior is overwhelming staff"* to a more actionable target involving the system staff rely on when student needs exceed what they can reasonably address alone. The pilot will test whether clearer pathways and more predictable response improve staff experience—and whether capacity remains a barrier even when the process is clearer.

Phase 4

North Valley enters Phase 4 with a more actionable target than the broad concern about student behavior with which it began. The team wants staff to have reliable access to timely support when student needs exceed what they can reasonably manage within their roles. Its Phase 3 analysis points toward two related issues: staff do not always know which pathway to use to request help, and the people expected to respond may already be handling competing demands.

The pilot therefore tests a clearer response pathway in a limited part of the school. Staff receive simple guidance about when and how to request assistance, who receives the request, and what should happen next. Backup responsibilities are also clarified.

The team wants to learn more than whether staff follow the new procedure. It asks whether staff know what to do, whether requests receive a timely response, whether the help provided is useful, and what happens when several people need assistance at once.

Initially, the new pathway appears promising. Staff report less uncertainty about whom to contact, and fewer requests bounce among several people before reaching someone who can help.

But the pilot also confirms something the team suspected in Phase 3. During high-demand periods, delays continue even when everyone follows the process correctly. Several requests may arrive at once, while the same small group of support personnel is responsible for responding.

The team resists interpreting this as an implementation failure or concluding that staff need more training. The pathway is clearer; available capacity is sometimes insufficient to make the pathway work reliably.

North Valley tests several small adjustments, including clearer backup roles and changes in coverage during predictable high-demand periods. It continues tracking when delays occur rather than relying only on an average response time.

The revised approach improves reliability, although it does not eliminate every difficult situation. Staff feedback also reminds the team that a fast response is not necessarily a useful response, so qualitative feedback remains part of the assessment.

At the end of the pilot, North Valley decides to keep the clearer pathway and move toward broader implementation while continuing to address capacity.

What North Valley learns: A strategy can work as designed and still fail under certain conditions. Piloting helps distinguish a problem with the strategy from a problem with the conditions required to make it work.

Phase 5

North Valley defines what it is implementing as a system with two essential functions: staff need a clear and dependable way to request help, and the school needs sufficient response capacity to make that pathway credible.

Its reassessment confirms that knowledge of the procedure is no longer the primary barrier. Demand varies substantially across the day, and the same support personnel often have several

competing responsibilities. Providing additional training would therefore do little to address the most important implementation problem.

Instead, North Valley matches supports to the actual barrier. It clarifies backup roles, adjusts staffing during predictable high-demand periods, and establishes a simple method for identifying times when demand repeatedly exceeds available capacity.

As implementation expands, the team monitors whether staff use the pathway, how reliably requests receive a response, and whether particular settings, times, or staff groups continue to experience delays. It also continues asking whether the support received is useful.

Monitoring identifies a recurring problem during one portion of the day. Rather than redesigning the entire response system, North Valley changes staffing arrangements during that period and continues monitoring.

Over time, the pathway becomes routine, but the school does not define sustainment simply as continued use of the protocol. If demand changes, staffing changes, or delays begin increasing again, the system will need to adapt.

What North Valley learns: Some implementation problems are not problems of knowledge, motivation, or compliance. When capacity is the barrier, implementation supports need to address capacity.

Example 4: Cedar Grove School District

Phase 1

Cedar Grove is a small school district with several schools and a relatively close-knit staff. The superintendent has made staff well-being a priority for the coming year. She is concerned about signs of burnout and about the number of employees who have recently left positions or expressed uncertainty about returning. In informal conversations and previous staff feedback, another concern has surfaced: some employees say they do not feel adequately supported by administrators or supervisors.

The superintendent initially wonders whether administrators need to be more available to staff. Before moving in that direction, however, she recognizes that "support" can mean many things. Staff might be looking for guidance when problems arise, useful feedback, coaching or mentoring, help navigating difficult situations, clearer expectations, emotional support, opportunities for professional growth, or simply stronger relationships with supervisors and colleagues.

Rather than assuming what staff mean, the district decides to explore a broader question: What kinds of support do staff need to succeed and thrive at work, and how well do current systems and relationships provide that support?

The superintendent is enthusiastic, but several principals respond defensively. They already work long hours, frequently respond to staff outside normal work hours, and believe they make themselves accessible whenever possible. Some hear the phrase "staff don't feel supported by administrators" as an accusation that they are failing at an important part of their jobs. The superintendent realizes that the process will be difficult if leaders believe its purpose is to evaluate or criticize them.

In subsequent conversations, she reframes the issue. The question is not whether individual administrators are sufficiently caring, hardworking, or available. Instead, the district wants to examine whether its systems and relationships reliably provide different employees with the guidance, feedback, connection, mentoring, coaching, and problem-solving support they need.

This distinction matters. It acknowledges the effort administrators are already making while leaving room to ask whether existing approaches work equally well for everyone. It also opens the possibility that administrators themselves may need additional structures or support to meet staff needs.

The principals remain somewhat apprehensive, but they agree that the question is worth exploring. Together, district leaders establish an expectation that difficult feedback should be treated as information for improvement rather than evidence of individual failure.

Cedar Grove creates a design team that includes newer and experienced teachers, paraprofessionals, student support staff, administrators, and a teacher who currently serves as a mentor to newer employees. The district deliberately includes staff at different career stages because support needs may change over time. A first-year teacher may need something very different from a veteran teacher, paraprofessional, counselor, or employee taking on a new role.

The presence of administrators creates an important design team challenge. Administrators are seen as knowledgeable about existing systems and they have more ability to act on recommendations. These factors make their participation valuable. At the same time, the team worries that staff would be reluctant to discuss experiences with supervision or administrative support candidly in front of the people who supervise them.

The team therefore agrees that administrators will participate in the design process, but not every staff-listening activity will include administrators. The team will create other opportunities for confidential or anonymous input during the next phase.

Members also establish a central norm: The goal is to improve the system of support and not to evaluate or blame individual administrators or staff members. The team's charter further clarifies confidentiality, how findings will be communicated, and how concerns about individuals will be handled if they arise.

Where the team is now: Cedar Grove has transformed a potentially threatening question about (i.e., "Why aren't administrators supporting staff?") into a shared inquiry about what effective support looks like and how the district can provide it more consistently. The next challenge will be creating ways for staff to describe their experiences candidly enough for the team to understand what "support" actually means to them.

Phase 2

Cedar Grove begins Phase 2 by asking what kinds of support do staff need to succeed and thrive at work, and how well do current systems and relationships provide that support?

Because leadership and supervision are potentially sensitive topics, the design team pays particular attention to method.

The district uses an anonymous survey to gather broad input. Questions distinguish different forms of support rather than asking simply whether staff "feel supported." Staff are asked about useful feedback, access to guidance, mentoring or coaching, help solving difficult problems, communication, recognition, and whether concerns receive meaningful follow-through.

The findings complicate the district's initial assumptions. Some employees report strong relationships with supervisors and ready access to help. Others describe support as inconsistent. Differences appear particularly important by career stage and role. Newer staff tend to want more frequent feedback and guidance. Some experienced employees want less direction, but greater access to consultation when unusual problems arise. Staff in some nonteaching roles are less certain where professional support is supposed to come from at all.

The design team follows the survey with listening sessions. Administrators do not attend these sessions, consistent with the agreement made in Phase 1. Staff are asked to describe times when they felt particularly well supported and times when needed support was missing.

The contrast is revealing. Strong support is not described simply as a supervisor "being available." Staff talk about receiving timely guidance, having someone help remove barriers, getting useful feedback, being connected to expertise, having difficult situations taken seriously, and knowing that someone will follow through.

The team also maps the professional-support resources already available: formal supervision, mentoring, coaching, peer support, professional learning, student-support consultation, and informal assistance. The map reveals that the district has many support structures, but access is uneven and their purposes are not always clear.

This is an important finding. The district does not necessarily lack support. It lacks **reliable access to the right kind of support for different needs**. Cedar Grove therefore selects the priority: Reliable access to useful professional support across roles and career stages.

Where the team is now: Cedar Grove has moved beyond the emotionally charged question of whether administrators are "supportive enough." Phase 3 can now examine which factors contribute to inconsistent access and what aspect of the support system should become the target for change.

Phase 3

Rather than starting with a priority that "administrators need to be more supportive", Cedar Grove enters Phase 3 with a priority that is deliberately broader: Reliable access to useful professional support across roles and career stages.

Phase 2 showed that the district already has many support structures, including supervision, mentoring, coaching, peer support, professional learning, consultation, and informal assistance. However, access is uneven and their purposes are not always clear. Staff also want different forms of support depending on role, experience, and situation.

The design team develops a problem statement: Staff do not consistently have access to the type of professional support they need when they need it. Existing supports are uneven across roles and career stages, and employees are not always clear about where to seek guidance, feedback, consultation, or problem-solving assistance.

Because the issue remains sensitive, the team is careful not to turn root-cause analysis into an evaluation of individual principals. A contributing-factors analysis identifies several possibilities: unclear purposes for existing support structures, differences in supervisor capacity, inconsistent access to mentoring and coaching, lack of scheduled developmental supervision for some roles, and uncertainty about where staff should go when they need expertise that their direct supervisor does not have.

One initial idea is to require principals to conduct more frequent check-ins with every employee. The team questions that solution. Phase 2 showed that **more supervisor contact is not necessarily what every employee wants**. Newer staff often want regular guidance and feedback, while some experienced employees primarily want timely consultation when unusual problems arise. Some nonteaching employees need clearer access to professional support that may not reasonably come from the principal at all.

The team identifies its target: Make appropriate professional support easier to identify and reliably access based on staff role, career stage, and type of need. Potential strategies include clarifying the purposes of supervision, mentoring, coaching, and consultation; identifying gaps by staff role; creating clearer pathways to specialized expertise; and strengthening developmental supervision where it is currently limited.

Rather than redesign the entire district support system at once, Cedar Grove decides to begin with two groups whose Phase 2 experiences suggest different needs: newer employees and staff in roles with limited access to regular professional supervision.

Where the team is now: Cedar Grove has moved away from the question *"Are administrators supportive enough?"* toward a system question: *Can different employees reliably get the kind of professional support they need?* Phase 4 will allow the district to test whether clearer and

more intentional support pathways improve that experience without simply adding more meetings for staff or supervisors.

Phase 4

Cedar Grove enters Phase 4 having deliberately moved away from the question, "Are administrators supportive enough?" Its target is now more specific: **make appropriate professional support easier to identify and reliably access based on staff role, career stage, and type of need**. Rather than redesigning the entire support system, Phase 3 identified two groups for an initial test: newer employees and staff in roles with limited access to regular professional supervision.

The team begins by clarifying what it needs to learn. It does not simply want to know whether staff like additional support. It wants to understand **what kind of support is useful to whom, whether staff can reliably access it, and whether the approach is feasible for the people providing it**.

For newer employees, Cedar Grove pilots predictable developmental check-ins with a designated source of support. The check-ins are intended to provide useful feedback, problem-solving assistance, and connections to additional expertise. They are not intended to simply be another supervisory meeting.

For several nonteaching roles, the pilot takes a different form. Because a direct supervisor may not have the same professional background, the district identifies people inside or outside the employee's building who can provide role-specific consultation when needed.

The team gathers brief feedback from participants and support providers. It asks whether staff know where to go, whether they can access help when they need it, what kind of help they receive, and whether the arrangements create an unreasonable burden.

The pilot produces different findings for the two groups. Newer employees generally value predictable contact, particularly when check-ins focus on problem solving and useful feedback rather than evaluation. For some other employees, however, regularly scheduled meetings feel unnecessary. What they value is knowing that knowledgeable consultation is available quickly when an unusual or difficult situation arises.

That difference becomes an important learning point. The team had already suspected that different employees need different forms of support; the pilot confirms that **standardizing the structure could actually make the strategy less responsive to staff needs**.

Cedar Grove therefore does not select one mentoring or supervision model for districtwide implementation. Instead, it identifies common functions that should be protected—clear access to support, appropriate expertise, useful feedback or problem solving, and follow-through—while allowing the source and format of that support to vary.

What Cedar Grove learns: Testing does not always identify one model to replicate. Sometimes it identifies the **function that must remain consistent and the form that should remain flexible**.

Phase 5

That lesson shapes Cedar Grove's definition of the strategy. The district is not implementing identical mentoring, coaching, or supervisory arrangements for every employee. It is implementing a system intended to ensure that staff can reliably access the kind of professional support they need.

Core elements include a clear pathway to support, access to appropriate expertise, and opportunities to address concerns before they become crises. Frequency, format, and source of support can vary according to role, career stage, and need.

When Cedar Grove reassesses context, it identifies several practical barriers. Supervisors differ in available time and areas of expertise. Some staff roles are represented by only one or two employees in a building. Providing role-specific support locally is therefore not always feasible.

The district matches its implementation supports to those conditions. Supervisors receive light guidance for developmental check-ins rather than a highly scripted protocol. Staff receive clearer information about available sources of support. Some roles use cross-building peer consultation, while employees can access specialized expertise when their direct supervisor cannot reasonably provide it.

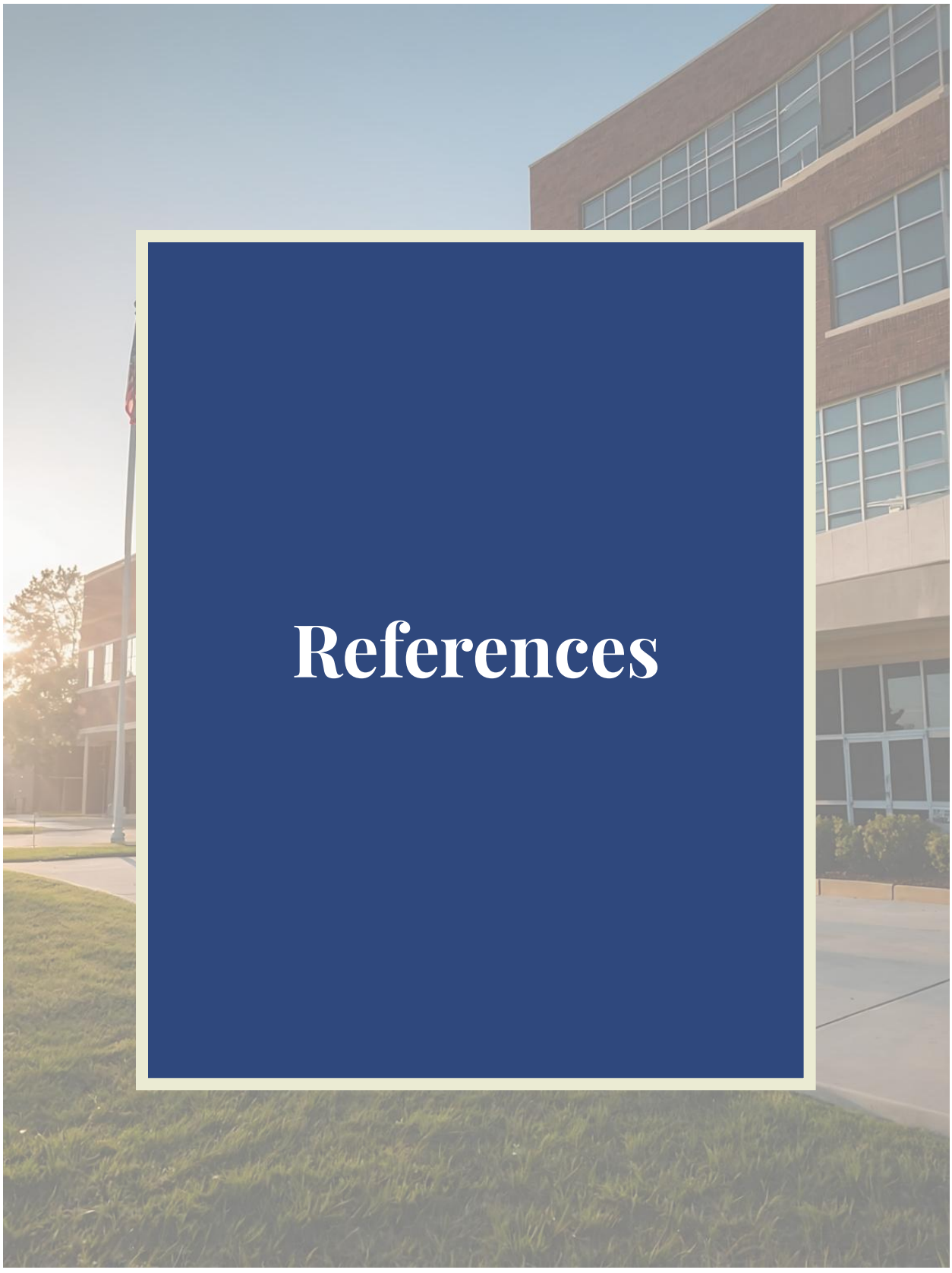
Monitoring focuses on more than whether meetings occur. Cedar Grove asks whether support is actually available and whether employees experience it as useful. Early implementation continues to show that predictable contact benefits many newer employees, while some experienced employees prefer easy access to consultation over regularly scheduled meetings.

The district allows those differences. It preserves the strategy's purpose and guardrails while adapting the delivery model.

Over time, Cedar Grove evaluates whether the various arrangements remain useful, feasible, and equitable. A support structure is not sustained merely because it has become routine. If

staff no longer benefit from it—or if maintaining it consumes time without serving its intended purpose—the district can change or discontinue it.

What Cedar Grove learns: Fidelity does not necessarily mean doing the same thing everywhere. When staff roles and needs differ, thoughtful adaptation may be necessary for equitable implementation.



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