GUIDE 1 OF 5 · IPG PLANNING TOOLS

Getting started

What the four tools do, who should be on your team, what to gather before you start, and how to sign in, claim your school and invite your team.

Reading time: about 10 minutes. The examples use two made-up schools, Pleasantville Middle School and Riverview Alternative High School. Every number about them is invented.

Systems for Innovative Schools, LLC · Rockford, Michigan · October 2026

What the tools are for

The IPG planning tools help a school team do the four pieces of work every Innovation & Progress Grant proposal rests on:

1. **Data Review & Needs Assessment.** Look at your data by need area, rate the needs as a team, talk through where you disagree, and choose one to three priority needs, each with an evidence statement.
2. **Root Cause.** For each priority, find the causes your school can act on, using a fishbone, the five whys and an evidence check, and tag each root cause with a code that points toward interventions.
3. **Evidence-Based Interventions.** For each domain you selected, choose interventions from the IPG menu that fit your root causes, check their evidence, and write the application section.
4. **Plan Builder.** From the interventions you chose, write your MICIP goals and Index targets, progress reporting, Year 1 budget activities and Total Amount Requested.

Each tool ends in proposal-ready text you can copy into your application. They are free for every eligible school.

> **THE ORDER MATTERS**
>
> Do the needs assessment first. The Root Cause tool works best when it starts from a priority you chose with evidence, and it can start straight from one, carrying the problem and its numbers across.

Who should be on the team

Plan on four to eight people. The tools work for a group in one room or for people rating on their own time, but the conversations in the middle of each tool need several perspectives.

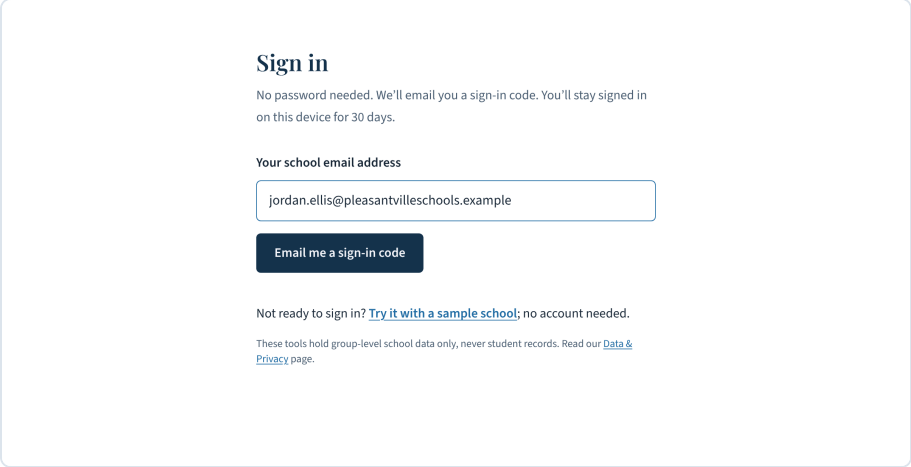
ROLE	WHY THEY MATTER
A lead who can facilitate	Keeps the team on evidence and on what adults can change, not on blame. Usually the principal or school improvement lead.
Someone who can pull data	Can run reports from the student information system, attendance and discipline logs, and local surveys.
Two or three teachers	Know what happens in classrooms, schedules and team meetings.
Student support staff	Counselor, social worker, special education or English learner staff, depending on your needs.
A family or student voice, if you can	Sees the school from the outside; often catches the cause the staff can't see.

Before you start: a checklist

- [ ] Your school's **claim code**, printed on its school profile from S4IS.
- [ ] The email addresses of your team members (school or district addresses are best).
- [ ] Two meetings of about 90 minutes for the needs assessment, and one or two for root cause.
- [ ] Local data your team trusts (see the Needs Assessment guide for a list of what helps).

1. Sign in

There is no password. Go to **tools.systemsforinnovativeschools.com**, choose **Sign in to your school**, and enter your school email address. You'll get an email with a six-digit code. Enter it to sign in; you stay signed in on that device for 30 days.



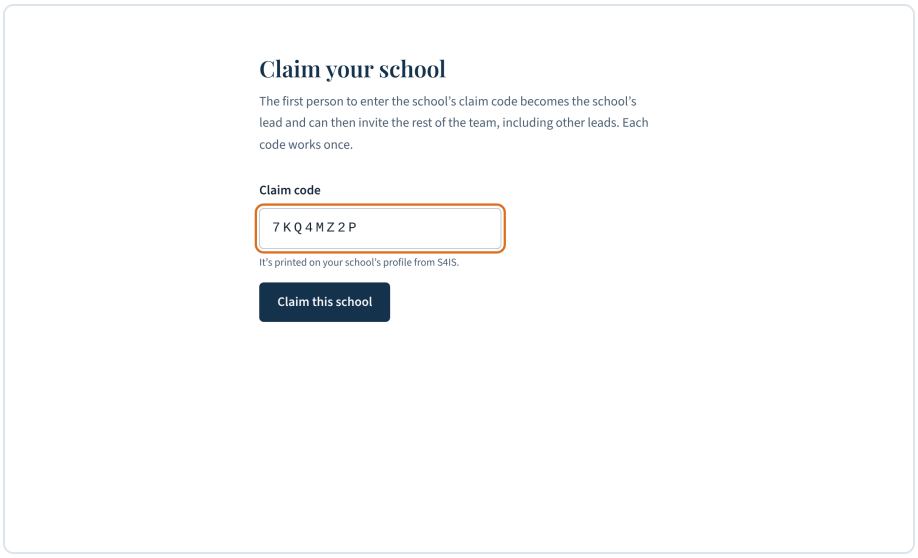
Sign-in page: your school email address, then the code from the email.

> **IF THE EMAIL DOESN'T ARRIVE**
>
> Wait two minutes, then check spam and any quarantine folder. Some district filters hold mail from new senders. If your district quarantines it, ask your technology office to allow mail from the S4IS tools site.

The first time you sign in, add your name and title so your team knows who you are.

2. Claim your school

Choose **Claim a school with a claim code** and enter the code from your school profile. The first person to use the code becomes the school's **lead**, and the code then stops working. Decide ahead of time who on your team will claim the school.



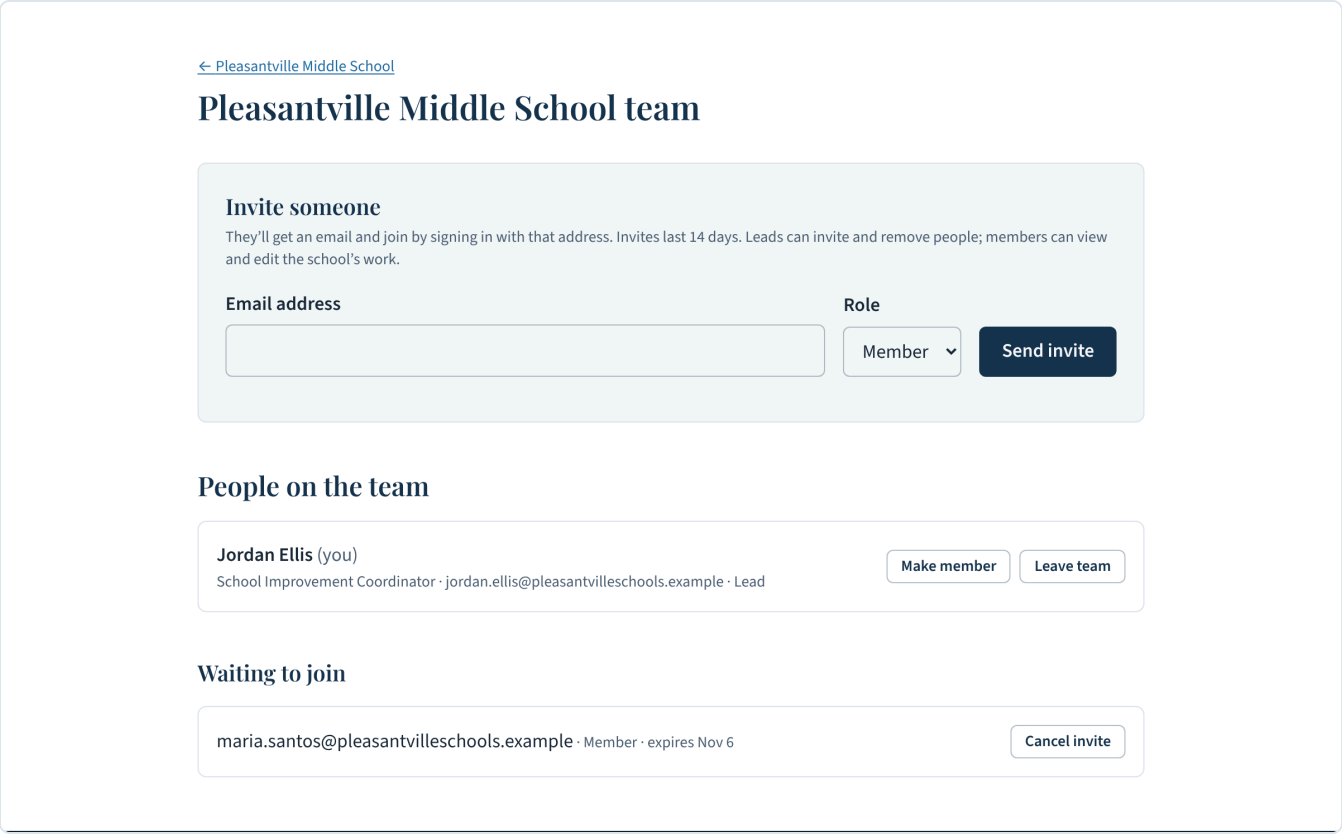
Claim your school with the code from its profile.

3. Invite your team

After you claim the school you land on its team page. Enter each teammate's email address and choose a role:

- **Member:** can do everything in all four tools.
- **Lead:** can also invite and remove people, and download or ask to delete the school's data. Most teams need one or two leads.

Each person gets an email. When they sign in with that address, they join the team.

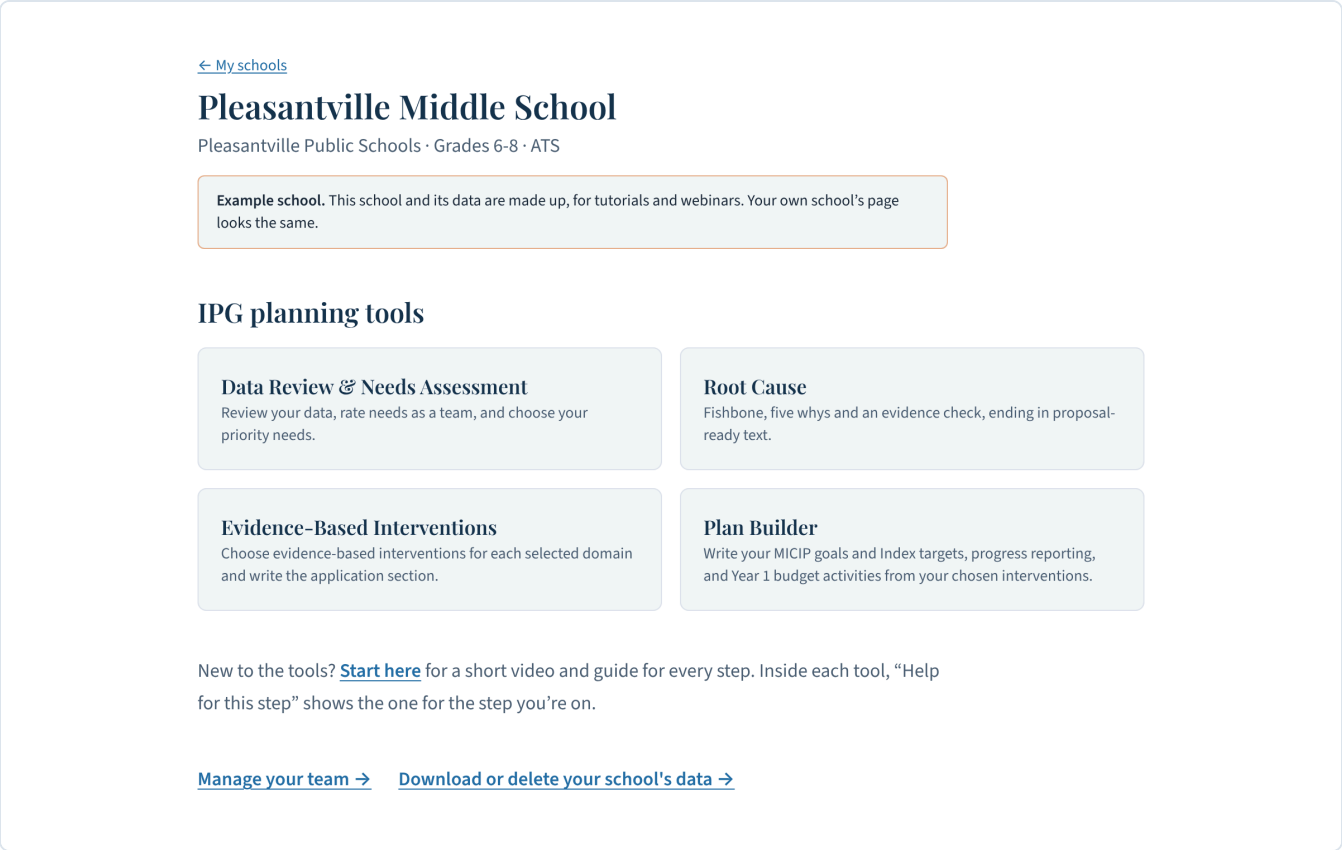


The team page, with an invitation waiting to be accepted.

> **EXAMPLE**
>
> Jordan Ellis, the school improvement coordinator at Pleasantville Middle School, claims the school and invites Maria Santos, the english learner coordinator, as a member.

4. Your school's page

All four tools start from your school's page. You can run more than one needs assessment, root cause analysis, intervention selection or plan, for example one per priority need.



The school page. Example schools carry a note saying so; yours won't.

How the tools protect students and staff

- **Group-level data only.** There is no place for student names, ID numbers, birthdates or anything else about one student. Every text box reminds you to describe groups and patterns.
- **Groups under 10 are suppressed.** Any number based on fewer than 10 students is stored as "fewer than 10", and the number itself is not kept.
- **Your work is your school's.** Only your team and S4IS can see it. Ratings are personal: teammates see how ratings spread, not who gave which.
- **You stay in control.** A lead can download all of the school's data or ask S4IS to delete it, from "Your school's data" on the school page.

The full Data & Privacy statement is linked at the bottom of every page.

What's next

Open the **Needs Assessment guide** and the first needs assessment video. If you'd rather look around first, **Try it with a sample school** on the home page opens two finished examples, no account needed.

IF YOUR TEAM GETS STUCK

Where to get help

The tools are free for every eligible school, and most teams can work through them on their own with this guide and the short videos. If you'd like another set of eyes, here is what's available.

1. Office hours

Four sessions, all Eastern time: Friday, November 13, noon to 1:30 p.m.; Friday, November 20, noon to 1:30 p.m.; Tuesday, November 24, noon to 1:30 p.m.; and Monday, November 30, 9 to 10 a.m. The first 30 minutes answer questions sent in ahead of time; the rest is open for questions live. Anything that needs more research or analysis is answered in the first half hour of the next session. Sign up on the Start Here page for the sessions you plan to join, or ask for the recordings, and send your questions on the same form.

2. Videos and guides

Every video and guide, step by step, is on the Start Here page. Inside each tool, "Help for this step" shows the video and guide pages for the step you're on.

3. One-on-one conversations

Office hours are the place to bring your questions. Booking links for individual conversations may be set up after the first office hours, depending on availability and need.

The office hours sign-up is on the Start Here page: tools.systemsforinnovativeschools.com/start