GUIDE 2 OF 5 · IPG PLANNING TOOLS

Data Review & Needs Assessment

What a needs assessment is, which data helps and which doesn't, how to run the two team meetings, and what to do at each of the tool's six steps.

Reading time: about 25 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 a needs assessment is

A needs assessment is a structured look at your data to find the gaps between where your students are and where they should be, and to decide which of those gaps matter most. It answers three questions: **What does the data show? Which needs are greatest? Which of them will we act on?**

There are two kinds, and it helps to know which one you're doing.

Comprehensive

Looks broadly across the whole school: achievement, attendance, climate, staffing, family engagement, programs. It's the foundation of continuous improvement planning, such as your MICIP work, and is usually done once a year or less.

Focused

Goes deep on a narrower set of areas tied to one decision. It uses the comprehensive picture as its starting point and adds the detailed data the decision needs.

This tool runs a focused needs assessment on the need areas the IPG addresses: chronic absenteeism, dropout and graduation, social and mental health, achievement and access, and building leadership. If your school has a recent comprehensive needs assessment, bring it to the first meeting; don't start from scratch.

Reasonable and appropriate data

More data is not better data. Good data for a needs assessment has five qualities:

1. **It answers a question.** Every piece of local data should respond to something the public data raised. "Chronic absence is high" raises "what happens after a student misses school?" The attendance call log answers it.
2. **It comes from more than one kind of source.** A common framework (Victoria Bernhardt's multiple measures) sorts school data into four kinds: *demographics* (who your students are), *student learning* (results), *perceptions* (surveys of students, staff and families) and *school processes* (what adults do: schedules, routines, follow-up). Needs show up in results; causes usually show up in processes.
3. **It's broken down by student group.** A school-wide average can hide the need entirely. Look at each group your school is accountable for.
4. **It shows a trend.** Two or three years tell you whether a number is moving. One year can be noise, especially for small groups.
5. **You can name its source.** Every number in your proposal needs a source and a year. If nobody can say where a number came from, leave it out.

LEAVE THESE OUT

- Anything about an individual student: names, ID numbers, lists, case details. The tools have no place for them, on purpose.
- Numbers from groups smaller than 10. The tool stores them as "fewer than 10" and doesn't keep the number.
- Stories without numbers. A powerful anecdote is a reason to look for data, not a substitute for it.
- Program activity with no results ("we held 12 family nights") unless you also know who came and what changed.

Where to look, by need area

NEED AREA	ALREADY IN THE TOOL	LOCAL DATA THAT OFTEN HELPS	USUALLY LESS USEFUL
Chronic absenteeism	Chronic absenteeism rate by year and student group; on-track attendance	Absences by grade, month and weekday; how fast absences get a family contact; contact in the family's language	Average daily attendance (hides chronic absence)
Dropout and graduation	Four- and six-year graduation rates; dropout rate; student groups	Students on track to graduate; credits earned per term; time from enrollment to a written credit plan	Graduation rate alone for a small or mobile school
Social and mental health	Suspension rates by student group	Days from referral to first service; climate survey items on belonging and a trusted adult; re-entry meetings after suspensions	Counts of programs offered, without who was reached
Achievement and access	MI School Index components; proficiency by subject and student group; English learner progress	Course failures by course; who is scheduled into which courses and electives; intervention time in the schedule	Grades alone, without a common standard
Leadership and routines	Usually none	Staff and leader turnover; how often teams meet with decision rules; observation and feedback cycles; shared planning time	Meeting counts, without what was decided

Running the two meetings

Meeting 1: the data (90 minutes)

- 10 min: purpose, roles and ground rules (evidence first; describe groups, not students)
- 35 min: step 1 together, one need area at a time, with the data on a projector
- 15 min: list the questions the data raised, and who will bring local data to answer them
- 30 min: start step 2; everyone rates on their own (finish before meeting 2)

Meeting 2: the decisions (90 minutes)

- 10 min: new local data, added in step 1
- 40 min: step 3, the disagreements, five to eight minutes each
- 10 min: step 4, the heat map
- 25 min: step 5, priorities and evidence statements
- 5 min: who writes the proposal section; when root cause starts

FACILITATION

Have everyone rate before anyone discusses. If people hear the principal's view first, you lose the disagreement that tells you where to look harder.

1 Our data

The tool opens with your school's public data, already loaded and grouped by need area. Each measure shows its latest value, earlier years and a comparison point: the state rate, or the median for schools like yours.

Overall

Measure	Latest	Earlier years	Compare with
MI School Index: Overall MI School Index results (example)	**61.7 of 100** 2024-25	2023-24: 59.9 of 100	middle school median (2024-25): 73.0
MI School Index: Overall, students with disabilities MI School Index results (example)	**18.4 of 100** 2024-25	none	all-student middle school median: 73.0
MI School Index: Overall, English learners MI School Index results (example)	**23.9 of 100** 2024-25	none	all-student middle school median: 73.0
Students who are economically disadvantaged MI School Data, enrollment (example)	**71.2%** 2024-25	none	none
Students with disabilities MI School Data, enrollment (example)	**15.1%** 2024-25	none	none
English learners MI School Data, enrollment (example)	**13.4%** 2024-25	none	none

Step 1: the overall picture, including the MI School Index for each student group the school is accountable for.

PLEASANTVILLE MIDDLE SCHOOL (ATS)

The overall index is 61.7, below the middle-school median of 73.0, but that isn't why the school is identified. Students with disabilities score 18.4 and English learners 23.9. In an ATS school, read every area twice: once for all students, once for the identified groups.

MTSS: chronic absenteeism

Where to look: MI School Data attendance files, your student information system, family contact records.

Measure	Latest	Earlier years	Compare with
Chronic absenteeism rate MI School Data, student attendance (example)	**34.1%** 2024-25	2023-24: 36.9%	state rate: 27.9%
Chronic absenteeism rate, students with disabilities MI School Data, student attendance (example)	**49.6%** 2024-25	none	none
Chronic absenteeism rate, English learners MI School Data, student attendance (example)	**26.8%** 2024-25	none	none
Chronic absenteeism rate, economically disadvantaged MI School Data, student attendance (example)	**39.8%** 2024-25	none	none

Your local data

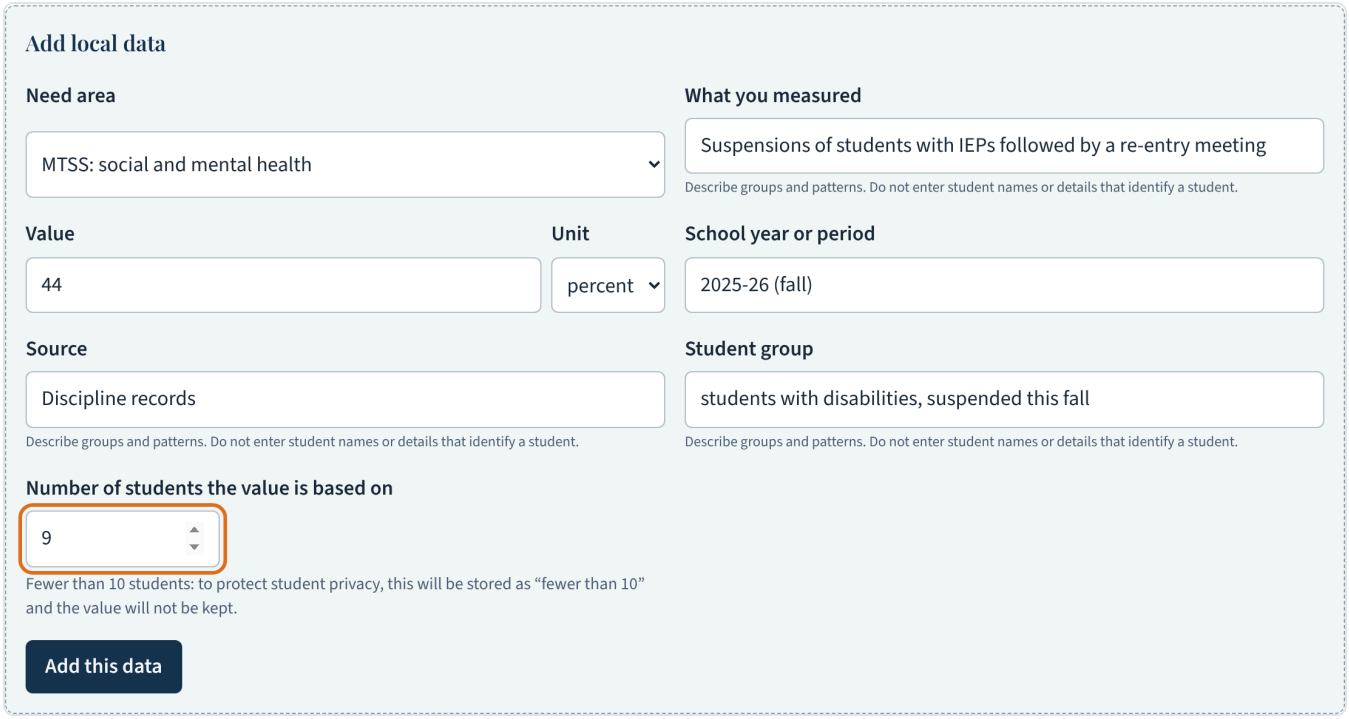
Absences of students with IEPs that got a family contact the same week: 18.0%
students with disabilities · 2025-26 (Sept-Oct) · Attendance office call log · 97 students — Remove

Families of English learners who get absence messages in their home language: 22.0%
English learners · 2025-26 (fall) · Family messaging system report · 86 students — Remove

Chronic absenteeism for all students and each group, with the local data the team added underneath.

Adding local data

Under the public data, **Add local data** takes one measure at a time: the need area, what you measured, the value, the year, the source, the student group, and the number of students it's based on. If that number is under 10, the tool stores the row as "fewer than 10" and does not keep the value.



Adding local data. A value from fewer than 10 students is stored without its number.

PLEASANTVILLE'S LOCAL DATA

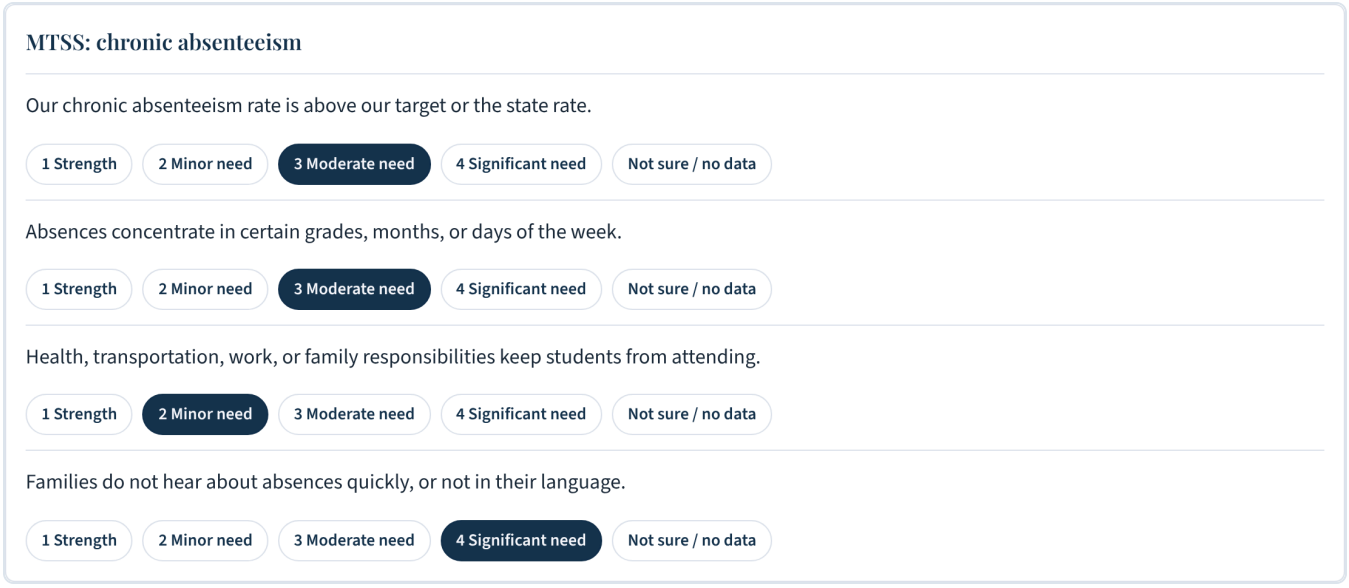
- **Absences of students with IEPs that got a family contact the same week:** 18% (Attendance office call log, 2025-26 (Sept-Oct)). The state data tells us how many students are chronically absent. Our call log tells us what we do about it.
- **Families of English learners who get absence messages in their home language:** 22% (Family messaging system report, 2025-26 (fall)). A message a family can't read isn't contact.
- **English learners scheduled into an elective other than English language development:** 46% (Master schedule, 2025-26). Access shows up in the schedule before it shows up in test scores.
- **Suspensions of students with IEPs followed by a re-entry meeting:** fewer than 10 students, so no value kept (Discipline records, 2025-26 (fall)). Nine students is under ten, so the tool keeps the row but not the number.
- **Co-taught ELA and math sections with weekly shared planning time:** 21% (Master schedule and planning calendar, 2025-26). This one is about adults, not students, so there is no student count.

RIVERVIEW ALTERNATIVE HIGH SCHOOL (CSI)

At an alternative high school, graduation and credit data carry the most weight, and the four-year rate tells only part of the story because most students arrive behind. Riverview's team added: students on track to graduate under their plan (36%); students with a written credit plan within 30 days of enrolling (29%).

2 Rate the needs

Each person rates all 21 need statements on their own, on a four-point scale: **1 Strength, 2 Minor need, 3 Moderate need, 4 Significant need**, or **Not sure / no data**, which is left out of averages rather than guessed. Ratings are personal: teammates see how ratings spread, not who gave which, and only the person who gave a rating can change it.



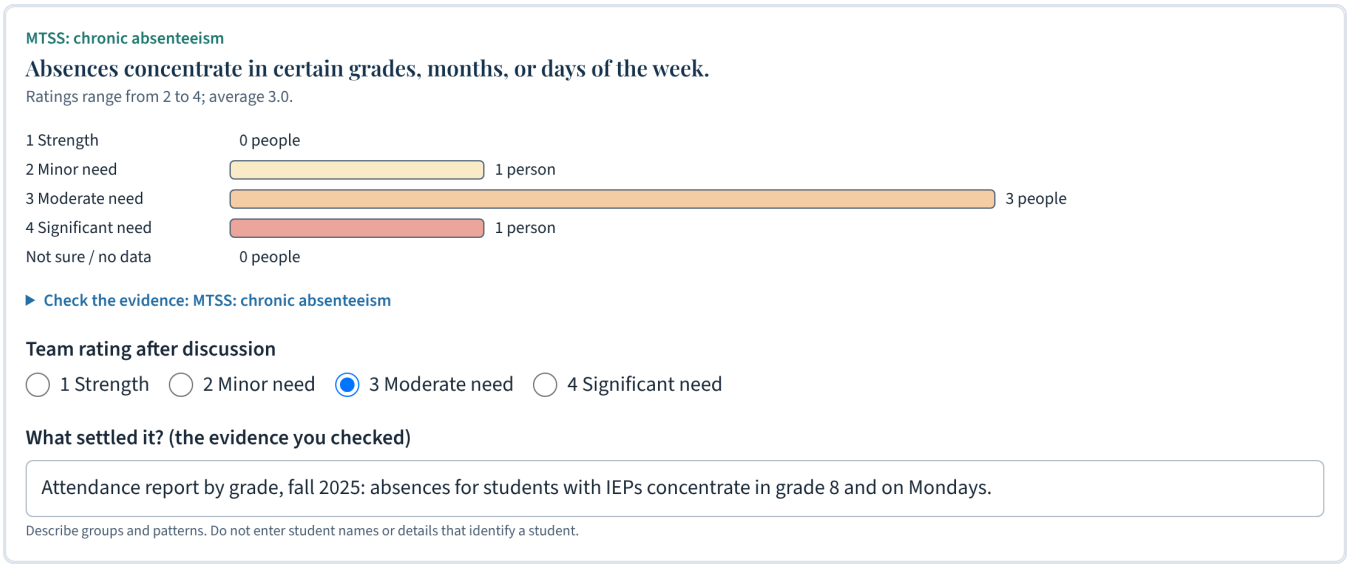
Step 2: rating the chronic absenteeism statements.

RATE THE EVIDENCE

Rate what the data shows, not what you hope is true. If a statement doesn't apply, such as graduation statements in a middle school, choose Not sure.

3 Look at disagreement

The tool lists every statement where ratings are two or more points apart. These are the most useful minutes of the needs assessment: disagreement usually means people are looking at different evidence, or that some evidence is missing.



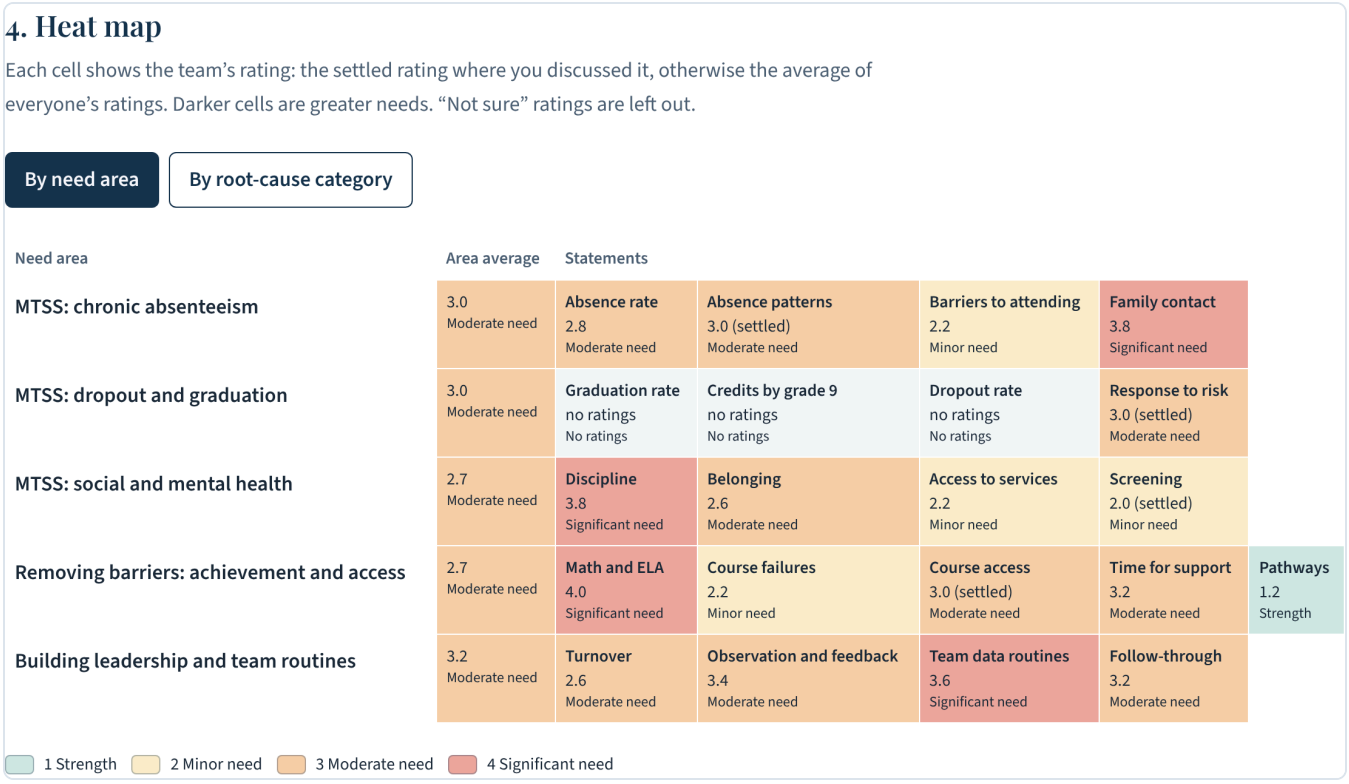
Step 3: the spread of ratings for one statement, with the evidence one click away.

For each one, ask a person at each end what they see. Open **Check the evidence** to see that area's data. Then choose a team rating and write what settled it, with its source. That note goes into your summary.

> **PLEASANTVILLE**
>
> Absence patterns were rated from 2 to 4. The attendance report settled it at 3: *Attendance report by grade, fall 2025: absences for students with IEPs concentrate in grade 8 and on Mondays.*

4 Heat map

The heat map shows the team's rating for every statement in one view: the settled rating where you discussed it, otherwise the average. Darker cells are greater needs. Switch to **By root-cause category** to see the same ratings grouped by the kind of cause they usually point to. Treat that as a hint for the root cause work, not a conclusion.



Step 4: Pleasantville's heat map by need area.

RIVERVIEW

Riverview's need is broad: dropout and graduation averages 3.9 and chronic absenteeism 3.4, with dark cells across both rows. Pleasantville's darkest cells are single statements, ELA and math and discipline, concentrated in its identified student groups. The same tool, two very different schools.

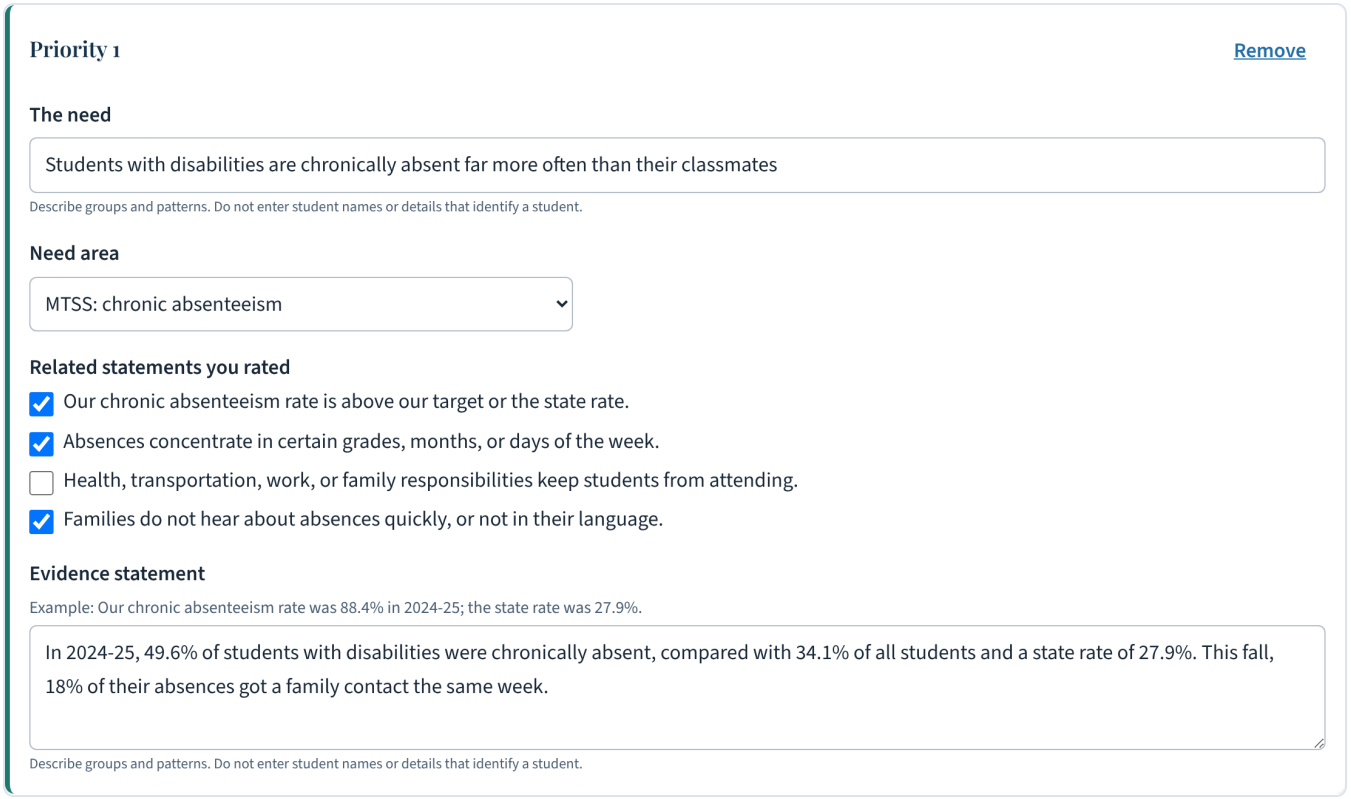
Need area	Area average	Statements				
MTSS: chronic absenteeism	3.4 Moderate need	**Absence rate** 3.8 Significant need	**Absence patterns** 3.0 (settled) Moderate need	**Barriers to attending** 3.8 Significant need	**Family contact** 3.0 (settled) Moderate need	
MTSS: dropout and graduation	3.9 Significant need	**Graduation rate** 4.0 Significant need	**Credits by grade 9** 3.8 Significant need	**Dropout rate** 3.6 Significant need	**Response to risk** 4.0 (settled) Significant need	
MTSS: social and mental health	2.7 Moderate need	**Discipline** 2.0 Minor need	**Belonging** 2.2 Minor need	**Access to services** 3.2 Moderate need	**Screening** 3.3 Moderate need	
Removing barriers: achievement and access	3.2 Moderate need	**Math and ELA** 3.8 Significant need	**Course failures** 3.8 Significant need	**Course access** 2.2 Minor need	**Time for support** 3.0 (settled) Moderate need	**Pathways** 3.2 Moderate need
Building leadership and team routines	2.6 Moderate need	**Turnover** 2.0 Minor need	**Observation and feedback** 2.8 Moderate need	**Team data routines** 3.4 Moderate need	**Follow-through** 2.4 Minor need	

Riverview Alternative High School's heat map.

5 Choose priorities

Choose **one to three** priority needs. Fewer is better. Rank by two things: the size of the gap, and how much your school can act on it. The tool lists your highest-rated needs; start from one, then rewrite it in your own words, naming the student group.

The most important box is the **evidence statement**: the finding as a number, with its comparison point and year. It goes almost word for word into your proposal.



Step 5: Pleasantville's first priority, with its related statements and evidence.

SCHOOL	PRIORITY	EVIDENCE STATEMENT
Pleasantville	Students with disabilities are chronically absent far more often than their classmates	In 2024-25, 49.6% of students with disabilities were chronically absent, compared with 34.1% of all students and a state rate of 27.9%. This fall, 18% of their absences got a family contact the same week.
	Students with disabilities and English learners are far from proficient in ELA and math	In 2024-25, 7.1% of students with disabilities and 9.6% of English learners were proficient in ELA, compared with 34.8% of all students. 38.5% of English learners made progress toward English proficiency.
Riverview	Students fall further behind on credits after they enroll	Our four-year graduation rate was 44.0% in 2024-25; the state rate was 84.0%. This fall, 36% of students are on track to graduate under their plan, and 29% of new students had a written credit plan within 30 days.

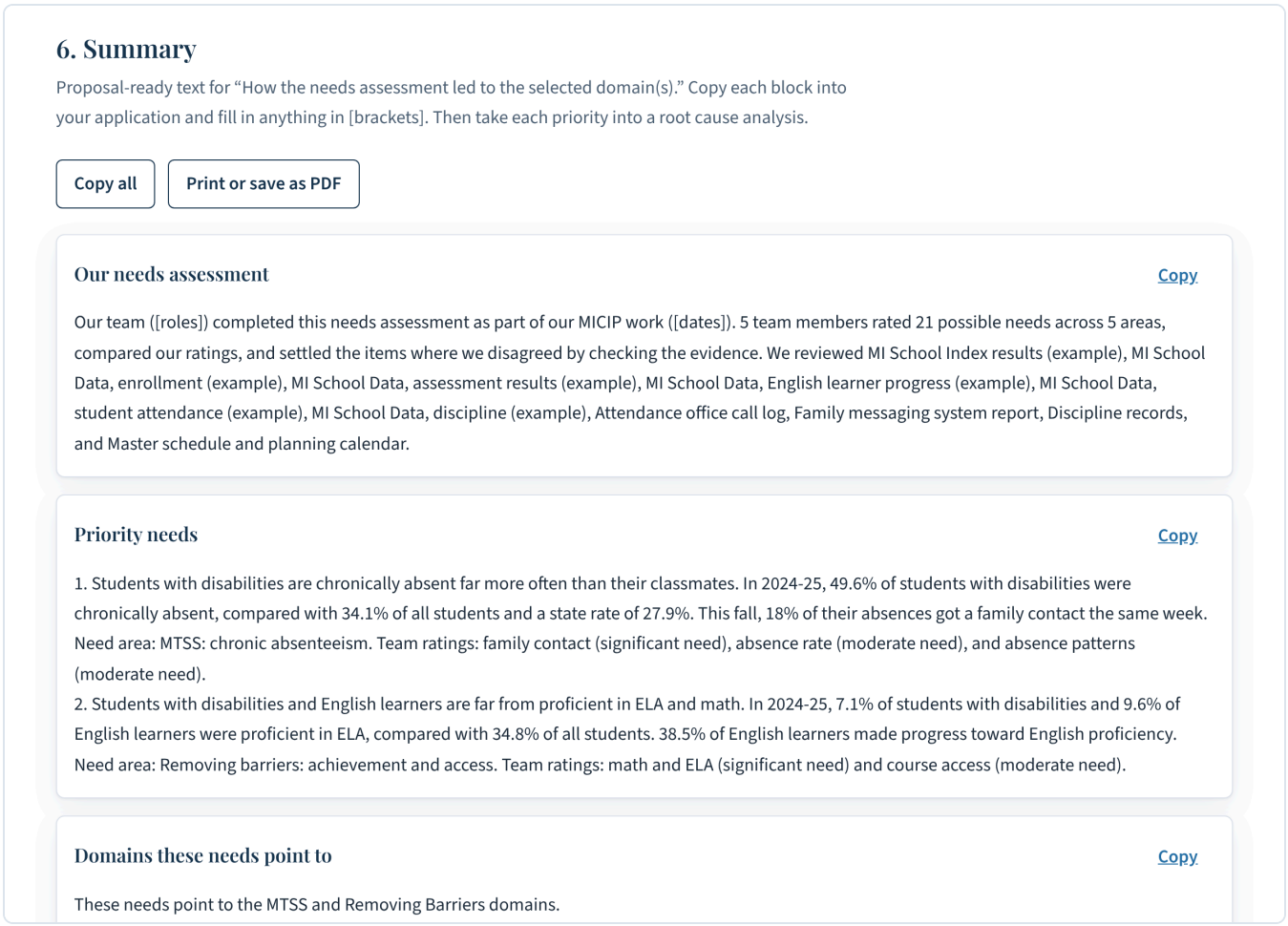
	Most of our students are chronically absent	Our chronic absenteeism rate was 84.1% in 2024-25; the state rate was 27.9%.

A WEAK EVIDENCE STATEMENT

"Attendance is a problem for some students" names no number, no group, no comparison and no year. Compare it with Pleasantville's first statement above.

6 Summary

The summary turns your work into proposal-ready text, in the order the application asks for it: your process, your data sources, your findings and your priorities. Words in square brackets, like your team's roles and meeting dates, are yours to fill in. Copy any block, copy everything, or print a clean copy.



Step 6: the summary, with a copy button for each block.

At the bottom, **Start root cause for this need** opens the Root Cause tool with the priority's problem and evidence already filled in. That's where the Root Cause guide picks up.

How this feeds your plan

A priority is a need, not a plan. The needs assessment tells you *what* to work on and gives you the numbers to measure progress against. Before choosing an intervention, find out *why* the need exists: that's the Root Cause tool. Your evidence statements also become your baseline: the same measure, from the same source, is how you'll show change.

Common pitfalls

- **Too many priorities.** Three is the limit; one or two is usually stronger.
- **School-wide averages only.** In a TSI or ATS school, the identified groups are the point.
- **Rating together.** It hides real differences. Rate alone, then talk.
- **Skipping the disagreement step.** It's where the team finds the evidence it was missing.
- **Evidence statements without numbers.** Every one needs a figure, a comparison and a year.

> **VIDEOS FOR THIS GUIDE**
>
> Needs Assessment 1 to 6 on the Start Here page, two to four minutes each, show every step with Pleasantville Middle School.

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