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# CAIS Guide to LEA and School Plans

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Plan Entry and  
Implementation

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Version 2.6  
September, 2011

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<b>PLAN ORGANIZATION .....</b>	<b>3</b>
<b>ADMINISTRATOR TASKS TO PREPARE FOR PLAN ENTRY .....</b>	<b>4</b>
<b>SET-UP LEA TAGS.....</b>	<b>4</b>
<b>ADD/MANAGE GOALS .....</b>	<b>6</b>
<b>ADD USERS .....</b>	<b>7</b>
<b>USER ACCESS LEVELS: .....</b>	<b>8</b>
<b>ADD BUDGET ALLOCATIONS .....</b>	<b>8</b>
<b>PLAN OVERVIEW AND FEATURES.....</b>	<b>10</b>
<b>CAIS PLAN SCREEN ELEMENTS.....</b>	<b>11</b>
MAIN NAVIGATION.....	11
PRINT REPORTS AND FILTERS .....	12
PLAN STATUS.....	12
<b>STRATEGIES .....</b>	<b>14</b>
<b>ACTION STEPS .....</b>	<b>14</b>
ACTION STEP OVERVIEW .....	17
ACTION STEP BUDGET ITEMS .....	19
<b>PLAN BUDGET PAGE .....</b>	<b>21</b>
<b>PLAN MODIFICATIONS.....</b>	<b>22</b>
<b>TIMELINE .....</b>	<b>22</b>
<b>RETIRING PLAN ELEMENTS.....</b>	<b>23</b>

## Putting Your Plan Online

Your Plan Leadership Team will likely want to initially write your Plan offline. Your Plan is a living document, so when entering your Plan into CAIS, you can save your work at any point, and come back and edit any parts of your Plan later, as needed. You may also **RETIRE** portions of your plan completed in the previous year, to remove them from the Plan Overview (see page 25).

For entering Plan information into CAIS, it is recommended that you have an electronic copy of your Plan (such as a Word document) rather than a paper version. This will make it easier for you to copy and paste detailed information from your Plan into CAIS.

### Plan Organization

CAIS uses a tiered structure for your Plan: Goals, Strategies, and Action Steps. You may also add specific Tasks to Action Steps. You will also create a Budget for your plan, and can track expenses as you implement the Action Steps

Goal	<p>A specific, measurable target for students to achieve. States <u>Who</u> will do <u>What</u> by <u>When</u> and <u>How</u> you will know it. (You may write them in SMART format: Specific and Strategic, Measurable, Achievable/Attainable, Results-oriented, and Time-bound.) Districts may have some goals pre-assigned by the State, and may also add their own, local goals. Schools may select goals from the District’s plan, and re-write them to reflect the school’s achievement target, and create their own goals.</p> <p>Title: Maximum 50 Characters    Description: Maximum 1000 Characters</p>
Strategy	<p>A general description of a process a district or school will take to reach the student achievement goal. Each Goal may have several Strategies. What will the district/school do to ensure that the goal is reached?</p> <p>Title: Maximum 50 Characters    Description: Maximum 500 Characters</p>
Action Step	<p>A specific action or activity that will lead to the implementation of the Strategy and achievement of the Goal. The Action Step includes a <b>Title, Description, Begin and End Dates</b> plus comments on timelines, persons responsible, costs and budget sources for each Action. Progress is tracked by updating status, attaching evidence, and adding comments as the step is implemented. Action Steps may also be "tagged" for filtered views of the plan, e.g. all steps affecting Special Education students, or all steps involving PD. Each Strategy may have several Action Steps.</p> <p>Title: Maximum 50 Characters    Description: Maximum 1000 Characters</p>
Task	<p>A specific action/activity that leads to the completion of an Action Step. Tasks have specific due dates, persons responsible and current status. Each Action Step may have multiple tasks.</p> <p>Title: Maximum 50 Characters    Description: Maximum 255 Characters</p>

# Administrator Tasks to Prepare for Plan Entry

Plan Administrators have the ability to Add/Edit features in preparation for Plan entry. This set-up should be done before your Team starts entering your plan, so that all features are available. The set-up includes: 1) Set up LEA Tags; 2) Add/Manage Goals; 3) Add Users to your plan, and; 4) Add Budget Allocations.

## Set-up LEA Tags

In addition to the Plan Tags created by the CDE, LEAs may create a second set of Tags, available to their LEA and School plans, as appropriate to your plan management and implementation needs.

To add LEA-specific tags, click on the LEA Settings link on the LEA Overview page:

The screenshot shows the LEA Overview page for Academic Excellence District. The navigation bar includes Home, LEA Overview, Monitoring, Plan, and File Cabinet. The 'LEA Settings' link is circled in red. The page displays 'Monitoring' instruments (Annual Submissions, Cycle 1-4) and 'LEA Plan' details (LEA Plan Overview, Goals like Reading/Language Arts Proficiency and Mathematics Proficiency). It also shows '2011 - 2012 School Year' and 'Update' buttons.

You will see a list and descriptions of any LEA Tags already created, as well as a list of all CDE tags available. To see a full description of the CDE tag, hover over the Tag name.

## LEA Plan Tags

[Add a New Tag](#)

EDIT	DELETE	SORT ORDER	COLOR	SHORT NAME	LONG NAME	DESCRIPTION	RELATIONSHIPS
		1	Gates	Gates	Gates Grant	\$10,000 for enhanced reading program for our upper grade non-readers	0

This management page allows LEA Admins to create LEA Plan Tags to be used in addition to State-created Plan Tags.

**State Tags**  
These are existing State Plan Tags that are available. Do not duplicate these tags with new LEA Tags.

- PD
- ELL
- SPED
- Eval
- IndianEd
- SIG
- Tech

Click on “Add a New Tag” to create additional LEA Tags. Give your new tag a Sort Order (1-8 determines the color of the tag), a Short Name (up to 10 Characters, appears in the Tag colored label), a Long Name (up to 30 characters), and a Description (up to 255 characters.) The Long Name and Description will pop-up by hovering over the Tag label wherever it appears in the plan.

## LEA Plan Tags

[Add a New Tag](#)

EDIT	DELETE	SORT ORDER	COLOR	SHORT NAME	LONG NAME	DESCRIPTION	RELATIONSHIPS
<p>Sort Order <input type="text"/></p> <p>Short Name: * The maximum length for Short Name is 10 characters. <input type="text"/></p> <p>Long Name: * The maximum length for Long Name is 30 characters. <input type="text"/></p> <p>Description: The maximum length for Description is 255 characters. <input type="text"/></p> <p><input type="button" value="Insert"/> <input type="button" value="Cancel"/></p>							
		1	Gates	Gates	Gates Grant	\$10,000 for enhanced reading program for our upper grade non-readers	0

This management page allows LEA Admins to create LEA Plan Tags to be used in addition to State-created Plan Tags.

**State Tags**  
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- PD
- ELL
- SPED
- Eval
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- SIG
- Tech

Click Insert to save your tag and add it to the LEA Tag list. You may also edit any existing LEA Tags by clicking on the pencil icon, or Delete a tag by clicking on the X. On the Action Step Add/Edit page, you will see both the State and LEA tags listed – you may check as many of each as fit the Action Step. Up to 8 CDE and 8 LEA tags will show on the Plan Overview for each Action Step. Both sets of Tags will show in the Tag filter on the Plan Overview. Anywhere the tags appear you may hover the cursor over the name of the tag to see the full description.

Tags:

SEA	LEA
<input type="checkbox"/> <span style="background-color: #FFD700; padding: 2px;">PD</span> -- Professional Development	<input type="checkbox"/> <span style="background-color: #FFD700; padding: 2px;">1Priority</span> -- LEA 1st Priority Step
<input type="checkbox"/> <span style="background-color: #4169E1; padding: 2px;">ELL</span> -- English Language Learner	<input type="checkbox"/> <span style="background-color: #4169E1; padding: 2px;">2Priority</span> -- LEA 2nd Priority Action Step
<input type="checkbox"/> <span style="background-color: #00CED1; padding: 2px;">SPED</span> -- Special Education	<input type="checkbox"/> <span style="background-color: #00CED1; padding: 2px;">Gates</span> -- Gates Grant
<input type="checkbox"/> <span style="background-color: #FF4500; padding: 2px;">Eval</span> -- Monitoring and Evaluation Step	
<input type="checkbox"/> <span style="background-color: #0000FF; padding: 2px;">IndianEd</span> -- Indian Education	
<input type="checkbox"/> <span style="background-color: #32CD32; padding: 2px;">SIG</span> -- SIG Indicators	
<input type="checkbox"/> <span style="background-color: #8B4513; padding: 2px;">Tech</span> -- Technology	

## Add/Manage Goals

**LEAs:** CDE may have assigned common Goals to your LEA. If so, these will appear in the LEA plan, ready to be edited with your Goal description specific to your LEA. You may also wish to add goals unique to your LEA.

**Schools:** School plans will be empty when first opened. All Goals must be added by the School Administrator, by selecting LEA Goal Templates or adding new Goals on the Manage Goals page.

Only Plan Administrators may add new Goals to a school or LEA Plan. All Users can edit existing Goals, and add Strategies, Action Steps and Tasks. To Add a Goal, click on the **Manage Goals** link. (If you are not an Administrator, you will not see this link.)

Academic Excellence District - LEA Plan

LAST UPDATED : Lisa Hamilton 08/25/2011 9:35 AM  
STATUS : In Progress  
PROGRESS : 15 % (6 of 39 Action Items Complete)

Plan Plan Implementation Checklist

LEA Submitters: Don District, Don Draper, Isabelle Improvement  
SEA Reviewers: Erin Carter (Wested), Lisa Hamilton, Libby Rognier (WestEd), Libby Rognier

Manage Goals

On the Manage Goals page, you will see a list of current goals in your plan.

## Manage Goals

### GOALS USED IN MY PLAN

[Reorder Goals](#) [+ Add a new Goal](#)

Origin	Title	
STATE	<b>Reading/Language Arts Proficiency</b> By 2012, all students currently in "falls far below" and/or "approaches" will increase in reading by10% as measured by state standards exams.	<a href="#">Edit Goal</a>
STATE	<b>Mathematics Proficiency</b> By 2012, all students currently in "falls far below" and/or "approaches" will increase proficiency in mathematics by15% as measured by state standards tests.	<a href="#">Edit Goal</a>
STATE	<b>Proficiency in English for ELLs</b> All English learners will make progress in learning English as measured by the State English Language Development Test. Eighty percent of Beginners will move to Early Intermediate;50% of Early Intermediate	<a href="#">Edit Goal</a>

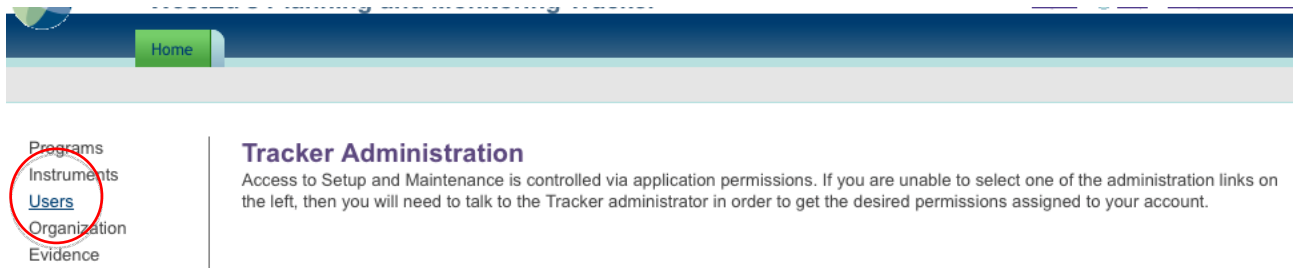
The Origin indicates at what level the Goal was first entered into CAIS. If the CDE created Goals that are auto-assigned to all districts, the origin will be State. If you Add a New Goal, you will give it a Title and Description unique to your Plan. The origin will appear as District or School. Schools may elect to add any goals from their District's plan (Template Goals), whether they originated with the State or District, or create their own unique goals. Any Goals you add, whether from a Template or a new goal, will require you to create a Description that is unique to your students and achievement targets. You may also re-order goals in your plan.

## Add Users

As the LEA or School Plan Administrator, you may give people access to your plan as Users. Users may edit anything on the Plan Overview, Add Strategies, Action Steps and Tasks, upload documents and make comments on plan elements. A User may be assigned as a Person Responsible for an Action Step or Task, and will be able to add Budget Items, Status Updates, and other indicators of Plan Implementation. To add a new User, click on the Setup and Maintenance link at the top of the page. (Only Plan Administrators will see this link.)



You will see a sidebar menu, with the Users link active. Click on this link to begin:



You will see a list of all Users currently assigned to your organizations. If you don't see the person you're interested in, you can search to see if they have an account. If not you can Add User from this screen.

### Contact Administration



Levels:

Organizations:

User Role:

User Name:

#### All Assigned Users (10)

Instructions/Description

NAME	ORGANIZATION	EMAIL	LEVEL	ADMIN
<a href="#">Ellie Element</a>	Excellence Elementary School	noreply+ellie@wested.org	School	
<a href="#">Juanita Juanderful</a>	Basics Elementary School	noreply+juanita@wested.org	School	
<a href="#">Michael Kemper (school)</a>	Basics Elementary School	kemper+school@avantexperience.com	School	
<a href="#">Laura Language</a>	Colorado Test School	noreply+laura@wested.org	School	

To Add a User, first select their Access Level (LEA or School) and the Organization they should be affiliated with. Then complete the required fields (and optional fields, if desired) and click Create

Account. An invitation with a link to the system will be sent to the new user. The Access Level assigned will determine what the User is able to do:

## User Access Levels:

### LEA User

LEA Users can work with both the Plan and Monitoring modules. They can create Plan goals, strategies, action steps, tasks and upload documents to the File Cabinet. They can also respond to monitoring items by uploading evidence and responding to instrument item questions. LEA Users can also see, comment on, and attach files to School Plans in the district.

### LEA Administrator (Added by the CDE)

In addition to performing all the functions of an LEA User, LEA Administrators have the ability to create new users in their district (LEA and School level) and select which district users may submit completed instruments to CDE. They can create LEA Tags, Manage Goals and Add or Edit funding sources for the Plan. They also have the ability to edit School Plans in the district.

### School User

Where school plans are available, school users may perform all of the Plan functions that LEA Users may perform. For District Plans, school users may upload documents and post comments. Additionally, school users may upload Draft documents associated with their school to the LEA's program monitoring items. They may see other schools' plans, but may not edit them.

### School Administrator

In addition to performing all the functions of a School User, School Administrators have the ability to create new users for their school. They can Manage Goals and Add or Edit funding sources for the Plan.


## Add Budget Allocations

The LEA or School Plan Administrator adds Allocations to the plan budget from available Funding Sources. These allocations are then available for Budget Items throughout the plan.

From any plan page, click the Budget link at the top to see the overall Plan Budget. LEA or School Plan Administrators will also see the Add Funding Source link.



Plan > Budget > Timeline

 Excellence Elementary School  
School Plan

**Budget**

Show 2011 - 2012 School Year

[+ Add Funding Source](#)

PROGRAM	SOURCE	LEA BUDGETED ALLOCATION	UNENCUMBERED	TOTAL
No records to display.				
TOTAL				

Administrators may select Federal or State funding sources (added by the CDE). LEA Administrators may also create their own LEA (Local) funding sources. On the Add Funding Source screen, select SEA or LEA to add a new source. CDE Funding Sources will allow you to select from a dropdown list of all available Federal and State sources. (NOTE: If you have already added a source to your budget, you may edit it on the budget overview page. It will no longer appear in the dropdown list.) An LEA Funding Source lets you type in a Title and Short Title (up to 20 characters for display) as well as fund information.

All Funding Sources allow a Carryover and Indirect amount. The Available Allocation is the sum of the Total Funding + Carryover – Indirect. This amount appears as the Total column in the Plan Budget. You may optionally click on Calculate to verify the amount before saving the record.

Once Funding Sources have been added by the Administrator, Plan Users may assign them to Budget Items.

### Add Funding Source

Enter each funding source and amount of funding available to your district. This will help you build a budget for your specific actions.

\*=required information

SEA  LEA

Year\*

Title

Short Title

Total Funding\*

Carryover

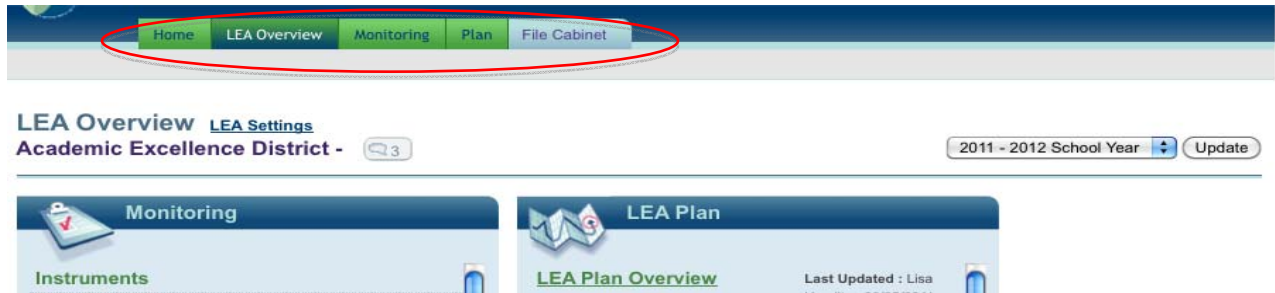
Indirect

**Available Allocation** 9,500.00

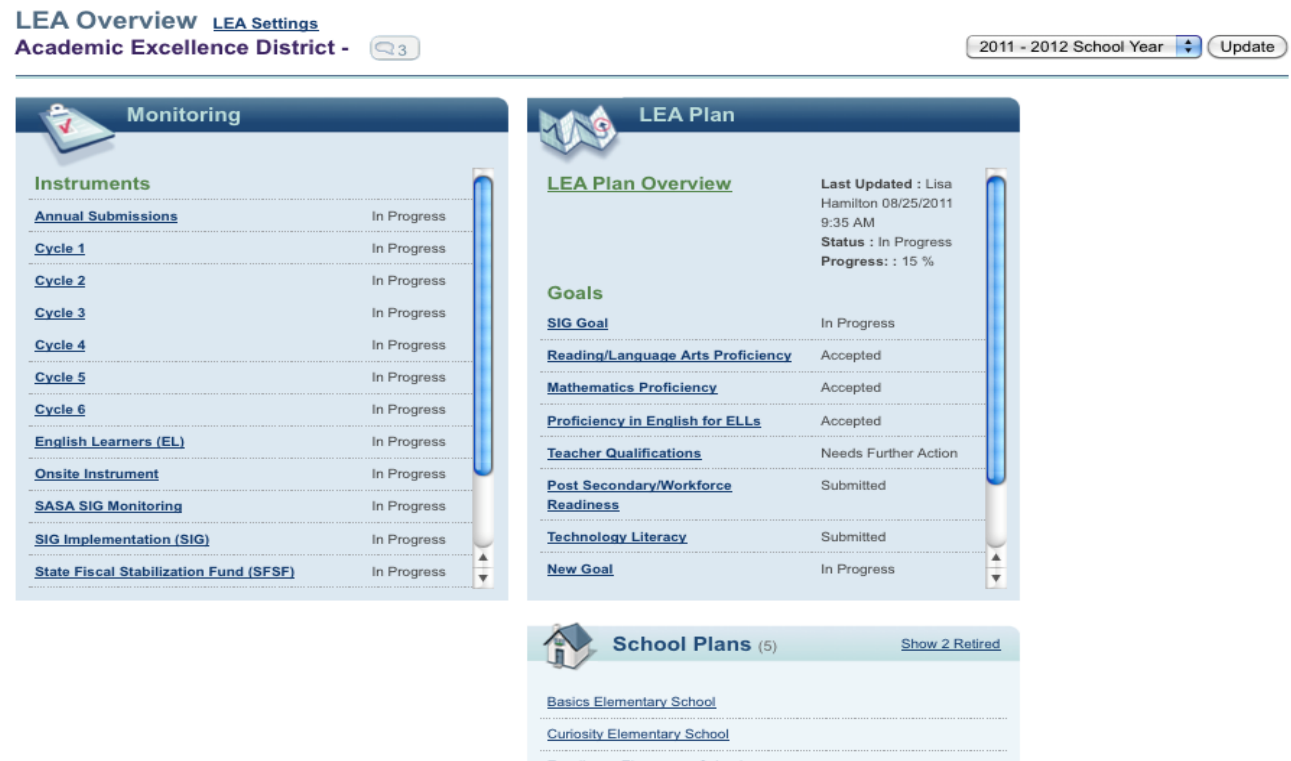
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# Plan Overview and Features

From your LEA Overview page, click LEA Plan Overview to see your LEA Plan page. School plans are also accessed from this page, by clicking on the name of the school in the list below the LEA Plan Overview. A school login generally takes you directly to the Plan Overview for your school. You can view this page by clicking the green LEA Overview link at the top of each page.



The LEA Overview gives access to the LEA Plan, School Plans in the LEA, and the LEA Monitoring Instruments. Both LEA and school users may view any of the plans and monitoring instruments. School users may only edit their own school plan, but may view, comment on, and download documents from any of the plans. School users may also upload draft documents to the LEA Monitoring Instruments as evidence for the required monitoring items. Clicking on “LEA Plan Overview” will take you to the top of that page. Clicking on a Goal title will take you to that Goal



on the Overview page.

From the LEA Overview, you may also switch to view previous year's data. Although your plan is continuous from year to year, Budget Sources and Items are year-specific. If you are an LEA Admin, you may also set LEA Tags (in addition to the CDE Tags) on the LEA Settings link on this page. LEA Tags are also available to schools.

The Default overview shows all of the Goals in your plan. To expand your plan and see the strategies, action steps and tasks, either click on the Expand Outline link to expand the entire plan, or click on the green triangles at each level to reveal the next level below.

The screenshot displays the 'WestEd's Planning and Monitoring Tracker' interface. At the top, there is a navigation bar with tabs for 'Home', 'LEA Overview', 'Monitoring', 'Plan', and 'File Cabinet'. The current page is 'LEA Overview' for 'Academic Excellence District - 05400845'. The page shows the LEA Plan status as 'In Progress' with 20% completion (9 of 44 Action Items Complete). Below this, there are filters for 'All Statuses', 'All Funding Sources', 'All Tags', 'All Assignments', 'All Updates', and 'Active', along with an 'Update' button. The main content area is titled 'Expand Outline' and lists two goals: 'Reading/Language Arts Proficiency' and 'Mathematics Proficiency'. The 'Reading/Language Arts Proficiency' goal is expanded, showing 4 strategies (3 incomplete) and 2 action steps (1 overdue). The 'Mathematics Proficiency' goal shows 2 strategies (1 incomplete) and 3 action steps (6 complete).

Your plan overview allows you to access and edit any part of your plan, attach and link to comments or files within your plan, see at a glance due dates for action steps and tasks, and what is overdue.

## CAIS Plan Screen Elements

### Main Navigation

The main navigation tabs allow you to easily access your LEA or Plan overview, as well as the Help documents, from any page within CAIS. Only Plan Administrators will see the Setup &

Maintenance link. Directly below the tabs, there are links to access the Plan Timeline and Budget. These features will be described later in this guide.

## Print Reports and Filters

The Plan Report links at the top of the overview allow you to create and print reports based on the content of your plan. You may print a full or filtered view of the Plan Overview (Plan links), as a PDF or Word document, or create an Implementation Checklist report, which shows the status history of all Action Steps and their associated Strategies and Goals. Under those links are the options for filtering the plan by Status of Action Steps (Not Begun, In Progress, Completed, Suspended), Funding Source, Tags (State or LEA), Person Assigned to a Task or Action Step, or recent Updates (Last 2 weeks, Last month, Last 3 months, Overdue.) You may also show all Active or all Retired portions of the plan.

Academic Excellence District - Improvement Plan

LAST UPDATED : Libby Rognier (WestEd) 05/09/2011 9:54 AM  
STATUS : In Progress  
PROGRESS : 18 % (7 of 39 Action Items Complete)

Plan Plan Implementation Checklist

LEA Submitters: Don District, Don Draper, Isabelle Improvement  
SEA Reviewers: Erin Carter (Wested), Libby Rognier (WestEd), Libby Rognier

Show All Statuses All Funding Sources All Tags  
All Assignments All Updates Active  
Update

Once you select the desired filter options, click **Update** to refresh the Plan Outline to see the updated view. When filters are applied, only those portions of the Plan contained within the filter parameters will show on the overview or print in a report.

After clicking the **Plan** PDF or Word link, your browser will download a copy of the Plan. The download location and how you access the print version will depend on your individual browser and download settings.

**Note:** When you have a custom filter applied, that filter will stay active, even after navigating away from the Plan Overview page and returning later. If you wish to remove your custom filter(s), click the **Clear Filters** button. Selecting the **Plan** or **Implementation Checklist** report when a custom filter is active will print the filtered version of the Plan.

## Plan Status

As you move down the Plan Overview screen, you will see status indicators for parts of the Plan that are complete, incomplete, and overdue. These indicators can help you see at a glance those areas of your Plan that need attention.

The Goal Status line shows the name of the Goal on the left, followed by the number of Strategies and associated functions. Action Step and Task status data is next, with Budget information

displayed on the far right. The Budget information is “rolled up” from the values entered for Action Steps under that particular Goal.

If the Goal originated at the state level, there may be CDE Resources attached to the Goal. These are documents provided by the state to assist districts and schools in meeting the requirements of the goal. They can be accessed by clicking on the number next to “CDE Resources available.”

<p><b>Goal</b> <a href="#">Reading/Language Arts Proficiency</a></p>	<p><b>STRATEGIES:</b> 4, 3 Incomplete <a href="#">Add Strategy</a> <a href="#">Order Strategies</a></p>	<p><b>ACTION STEPS:</b> 2 of 9 Complete <span style="color:red">▲</span> 1 Overdue ↳ <b>TASKS:</b> 10 of 21 Complete</p>	<p>Budgeted: \$9,952.00 Actual: \$1,500.00</p>	<p> 3  3</p>												
<p>STATUS: <b>Accepted</b> 4/27/2010 <a href="#">Status History</a></p> <p>By 2012, all students currently in "falls far below" and/or "approaches" will increase in reading by 10% as measured by state standards exams.</p> <p><b>SEA Resources available: 1</b></p>																
<p><b>STRATEGY</b> <a href="#">Standards Aligned Instruction</a></p>	<p><b>ACTION STEPS:</b> 3 <a href="#">Add Action Step</a> <a href="#">Order Actions</a></p>		<p>Budgeted: \$52.00 Actual: \$0.00</p>	<p> +  +</p>												
<p>STATUS: <b>Not Reviewed</b> 9/8/2011 <a href="#">Status History</a></p> <p>Ensure that classroom instruction is aligned with state content standards, using standards-aligned instructional materials, including technology-based materials.</p>																
<table border="1"> <thead> <tr> <th>ACTION STEP</th> <th>RESPONSIBLE</th> <th>STATUS / BUDGET</th> <th></th> </tr> </thead> <tbody> <tr> <td> <p><a href="#">Grade Level Teams Review Standards and Materials</a></p> <p>Organize grade-level teams to review state Reading/Language Arts standards and adopted instructional materials to ensure alignment and comprehensive coverage. (This also provides professional development for teachers involved in reviews.) (Due on 9/30/2011)</p> <p>↳ <b>TASKS:</b> 2 of 3 Complete <a href="#">Add Task</a></p> <p><a href="#">Form and Schedule Teams</a> (Due on 8/19/2011) <a href="#">Collate Reviews</a> (Due on 9/9/2011) <a href="#">Publish Findings</a> (Due on 9/23/2011)</p> </td> <td> <p>Isabelle Improvement Ronnie Reads</p> </td> <td> <p>In Progress 9/8/2011</p> <p>Does not require funding</p> </td> <td> <p> +  1</p> <p>SEA (1) PD</p> <p>LEA (2) 1 Priority School</p> </td> </tr> <tr> <td> <p><a href="#">Instructional Observation and Monitoring</a></p> </td> <td> <p>Isabelle Improvement</p> </td> <td> <p>In Progress 9/8/2011</p> </td> <td> <p> +  +</p> </td> </tr> </tbody> </table>					ACTION STEP	RESPONSIBLE	STATUS / BUDGET		<p><a href="#">Grade Level Teams Review Standards and Materials</a></p> <p>Organize grade-level teams to review state Reading/Language Arts standards and adopted instructional materials to ensure alignment and comprehensive coverage. (This also provides professional development for teachers involved in reviews.) (Due on 9/30/2011)</p> <p>↳ <b>TASKS:</b> 2 of 3 Complete <a href="#">Add Task</a></p> <p><a href="#">Form and Schedule Teams</a> (Due on 8/19/2011) <a href="#">Collate Reviews</a> (Due on 9/9/2011) <a href="#">Publish Findings</a> (Due on 9/23/2011)</p>	<p>Isabelle Improvement Ronnie Reads</p>	<p>In Progress 9/8/2011</p> <p>Does not require funding</p>	<p> +  1</p> <p>SEA (1) PD</p> <p>LEA (2) 1 Priority School</p>	<p><a href="#">Instructional Observation and Monitoring</a></p>	<p>Isabelle Improvement</p>	<p>In Progress 9/8/2011</p>	<p> +  +</p>
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<p><a href="#">Instructional Observation and Monitoring</a></p>	<p>Isabelle Improvement</p>	<p>In Progress 9/8/2011</p>	<p> +  +</p>													

The Action Step detail includes persons responsible for the step, status of implementation, associated tasks and tags. The Budget information identifies whether or not the Action Step requires funding. If so, the total budgeted and actual amounts for the current School Year are shown.

The Comment and Attachment icons indicate how many of each are associated with this Plan element. Clicking on the icon allows you to view and add an attachment or a comment at that level within the Plan. (Attachments may be added to the Plan, Goal, Strategy or Action Step level. Comments may also be added to Tasks.) If the paperclip has a red flag on it, it means that there is Required Evidence that needs to be attached to the Plan or Goal. Required evidence may be requested by the State at the Plan level or on any state-assigned goals.



## Entering Plan Data

This section will review how all Users can **add** new content to the Plan (Strategies, Action Steps, Descriptions, etc.) and **update** content as you implement or refine your plan.

**Goals** – Your Plan Goals will be added by your Plan Administrator. (See page 6 for instructions.)

### Strategies

The next step is to add Strategies. You may add as many Strategies as necessary to successfully achieve your Goals. To do so, click the **Add Strategy** link in the Goal Preview section.

The screenshot shows a goal preview for 'Reading/Language Arts Proficiency'. It includes a 'STATEGIES' section with a red circle around the 'Add Strategy' and 'Order Strategies' links. Other sections include 'ACTION STEPS' (2 of 9 Complete, 1 Overdue), 'TASKS' (10 of 21 Complete), budgeted/actual amounts (\$9,900.00/\$1,500.00), and a status of 'Accepted 4/27/2010'. A description below states: 'By 2012, all students currently in "falls far below" and/or "approaches" will increase in reading by 10% as measured by state standards exams.' There is also a link for 'SEA Resources available: 1'.

The Add a Strategy entry screen will appear.

The 'Add a Plan Strategy' form is shown for the goal 'Reading/Language Arts Proficiency'. It has a title field with a 'Spell Check' link below it, and a larger description field with a 'Spell Check' link below it. At the bottom are three buttons: 'Save', 'Save and Add Another', and 'Cancel'.

For each new Strategy, you enter a short Title as a reference for the activity you are describing. For the Description, you may be more specific about what will happen and who will participate. When you are finished, press **Save** to return to the Plan or **Save and Add Another** to create a new Strategy. The Title may be a maximum of 50 characters, the Description maximum is 500 characters. Once a Strategy is created, you can modify it by clicking the Strategy title link on the Plan Overview screen.

### Action Steps

After you create a Strategy, you will add specific Action Steps that outline what needs to be done. Action Steps should be reasonable steps needed to accomplish a Strategy, leading to the achievement of a Goal.

On the Plan Overview screen, in the Strategy box, click the **Add Action Step** link. The Add an Action Step screen will appear, showing the related Goal and Strategy at the top.

Goal: Mathematics Proficiency  
 ↳ Strategy: NCTM E-Conference Participation

## Add an Action Step

Instructions/Description for Action Step

Title: *	<input type="text" value="Selection of E-Workshops"/>
Description: *	<input type="text" value="The LEA Mathematics Specialist will meet with each middle school Mathematics department to review and select appropriate E-Workshops."/>
Start Date (mm/dd/yyyy): *	<input type="text" value="12/01/2010"/>
End Date (mm/dd/yyyy): *	<input type="text" value="01/14/2011"/>
Timeline Notes:	<input type="text" value="Workshops take place Jan. - Feb, Each is 4 sessions, 1 per week."/>

The fields with \* are required (Title, Description, Start and End dates.) If the Action takes place over a long period of time, you may want to add **Timeline Notes** (e.g. Once per week for 10 weeks.) If appropriate, check the **Requires Funding** and/or **Professional Development** checkboxes. You will come back later to specify the budget item(s) and Actual costs. All Budget amounts assigned to Action Steps total up to the Strategy and Goal levels on the Plan Overview. If this is a Professional Development activity, you may want to note the intended **Audience** for the PD.

Scrolling down the page, you will see two columns of possible Tags which may be assigned: one set from the CDE and one set created by the LEA Administrator. Both sets are available to school as well as LEA plans. Tags designate special programs or populations that are associated with the Action Step (e.g. Professional Development (PD) or English Learners (EL).) Putting Tags on Action Steps allows you to filter the plan for specific designations in the Plan Overview. For example, you may want to see all of the PD activities throughout the plan in order to organize the year's PD schedule.

Tags:

- |  |   |
|--|---|
| SEA (4)  | LEA (0)   |
| <input checked="" type="checkbox"/> <b>PD</b> -- Professional Development  | <input checked="" type="checkbox"/> <b>1Priority</b> -- LEA 1st Priority Step |
| <input checked="" type="checkbox"/> <b>ELL</b> -- English Language Learner | <input type="checkbox"/> <b>2Priority</b> -- LEA 2nd Priority Action Step     |
| <input checked="" type="checkbox"/> <b>SPED</b> -- Special Education       | <input type="checkbox"/> <b>Gates</b> -- Gates Grant                          |
| <input type="checkbox"/> <b>Eval</b> -- Monitoring and Evaluation Step     |   |
| <input type="checkbox"/> <b>IndianEd</b> -- Indian Education               |   |
| <input type="checkbox"/> <b>SIG</b> -- SIG Indicators                      |   |
| <input type="checkbox"/> <b>Tech</b> -- Technology                         |   |

Responsible:

- Adam Admin  
 Jane Austen  
 Ron Burqundy

The LEA may have its own list of Tags, specific to programs, priorities or designations for filtering and monitoring the plan. The LEA Tags are created by the LEA Administrator. (See page 4.)

Finally, you may check one or more persons who are **Responsible** for implementing this Action Step. A list of everyone associated with your plan (Administrators and Users) will appear for you to check off the appropriate names. When finished, click **Save** or **Save and Add Another** to continue plan entry. Below is an explanation of each field on the Action Step detail screen.

Title	Short title of the Action Step. <b>Maximum characters: 50</b>
Description	Detailed description of the Action Step. <b>Maximum characters: 1000</b>
Start Date / End Date	These dates will be graphed on the Timeline and will trigger reminder icons on the Plan Overview to show which Items need attention. Choose from pop-up calendar or enter as <b>mm/dd/yyyy</b>
Timeline Notes	(Optional) Notes that will appear in the Timeline regarding this Action Step. <b>Maximum characters: 255</b>
Requires Funding?	Check this box if the Action Step will require funding. This will enable you to later add Budget Items from the Action Step Overview screen.
Professional Development Needed?	Check this box if this Action Step involves Professional Development for staff.
Audience	Use this field to enter who would need to attend any Professional Development activities, if appropriate.
Tags	Check the appropriate tags that apply to the Action Step. These tags are used for filtering purposes on the Plan Overview and when generating reports. Check all that apply.
Responsible	Designate one or more person responsible for the implementation of this Action Step.

## Action Step Overview

Once an Action Step is created, the Action Step Overview is displayed. You also reach this view by clicking on the Action Step title from the Plan Overview. This screen allows you to access and add implementation information to the Action Step, such as Status Updates, Tasks and Budget Items.

**STATE GOAL:** [Reading/Language Arts Proficiency](#)

↳ **STRATEGY:** [Standards Aligned Instruction](#)

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↳ **ACTION STEP:** [Grade Level Teams Review Standards and Materials](#) 🗨️ + ✎️ +

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**Details** | Status Updates | Tasks (3) | Budget Items | Budget by Source

[Edit](#)

Description	Organize grade-level teams to review state Reading/Language Arts standards and adopted instructional materials to ensure alignment and comprehensive coverage. (This also provides professional development for teachers involved in reviews.)
Current Status	IN PROGRESS <a href="#">Update Status</a>
Start-End Dates	08/15/2011 - 09/30/2011
Responsible	Isabelle Improvement, Ronnie Reads
Requires Funding	No
Professional Development?	No
Tags	SEA (1) LEA (2) <span>PD</span> <span>1Priority</span> <span>School</span>

This is where the Plan implementers will come to update their progress toward completing the Improvement Plan – attaching relevant files, adding Comments and Status Updates, marking Tasks as Completed, and recording Actual Budgeted amounts spent. The default Tab shows Details of the Action Step content: Description, Start and End dates, Person Responsible, assigned Tags, etc. The Edit button shows the Action Step entry screen and allows you to change any information.

## Status Updates

Status Updates and Notes are intended not only to report on progress toward completion of the Plan, but also to provide a thoughtful review of the effect of Actions taken, and any adjustments recommended to accomplish the Goals. Describing in detail what has been done, what the effects have been, and what will be done next will strengthen your Plan. Status Notes may be up to 255 characters in length. To add lengthier comments, use the Comment box or add an Attachment, and note in the Status Update where to look for additional information.

↳ **ACTION STEP: Grade Level Teams Review Standards and Materials** 🗨️ + 📎 1

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[Details](#) | **[Status Updates](#)** | [Tasks \(3\)](#) | [Budget Items](#) | [Budget by Source](#)

[+ Update Status](#)

PERSON	DATE	STATUS	STATUS NOTE
Don District	09/08/2011	In Progress	See synopsis of Team reviews attached. (In file Cabinet)
Isabelle Improvement	09/08/2011	In Progress	Teams have met 3 times to review standards & materials - final recommendations due 9/23.

## Tasks

Once an Action Step is created, you may want to break it up into more granular specific activities. Although Tasks are optional, you may find them helpful to keep track of who is responsible for each part of the Action Step implementation. Tasks appear in the Plan Overview with their due dates to help keep you on target for implementing your Plan. Task descriptions may be up to 255 characters.

**STATE GOAL:** [Reading/Language Arts Proficiency](#)

↳ **STRATEGY:** [Online Support for Teaching Reading](#)

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↳ **ACTION STEP: PD for Teachers in Using Online Group** 🗨️ + 📎 1

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[Details](#) | [Status Updates](#) | **[Tasks \(3\)](#)** | [Budget Items](#) | [Budget by Source](#)

Current Active Update [Reorder Tasks](#) [+ Add Task](#)

NO.	TASK	DATE	STATUS	RESPONSIBLE	
<input type="text" value="1"/>	<a href="#">Setup for PD</a> copy materials, set up lab, etc.	01/28/2011	In Progress	Lisa Lea (LEA)	<span>🗨️ +</span>
<input type="text" value="2"/>	<a href="#">Set up multiple PD sessions</a> and create online registration	01/10/2011	Completed	Isabelle Improvement (LEA)	<span>🗨️ +</span>
<input type="text" value="3"/>	<a href="#">Coordinate with IT</a> Contact IT to set up community	12/17/2010	Completed	Isabelle Improvement (LEA)	<span>🗨️ +</span>

## Action Step Budget Items

**NOTE:** Before you can add Budget Items to Action Steps, your plan Administrator must add Funding Sources and Allocations to the overall plan Budget. (See page 8.) The Plan Budget section provides an area where you can review all available funds that you will use to complete your Plan.

If your Action Step is checked as Requires Funding, you can use Budget Items to itemize costs, and indicate from which funding source the money will be applied. The Budget Items tab displays all amounts and funding sources already assigned to an Action Step.

↳ **ACTION STEP: PD for Teachers in Using Online Group** 🗨️ + ✎️ 1

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Details Status Updates Tasks (3) **Budget Items** Budget by Source

Current Active 2011 - 2012 School Year Update ➕ Add Budget Item

Edit All Update All Cancel Edit All

Delete	Budget Items	Qty	Unit	Cost	Budgeted Amount	Program Funding	Notes	Actual
✕	<a href="#">Training for softwar...</a>	1	Training	\$1,500.00	\$1,500.00	Title II-A	<a href="#">In person computer l...</a>	\$1,500.00
✕	<a href="#">Two PD online commun...</a>	2	Subscrip	\$200.00	\$200.00	Gates Grant		\$0.00

Starting with Version 2.6, CAIS filters Budget Items by School Year in all cases. The School Year for a Budget Item is determined by its Funding Source. You may use the School Year filter to view records from previous years.

To edit all Budget Items for an Action Step simultaneously, click on Edit All. The table will allow you to change the Quantity, Unit, Cost, Budgeted Amount, Source, or Actual amount of any or all items. Click Update All to save your changes. You may edit a single Budget Item by clicking on the Title in the first column.

Details Status Updates Tasks (3) **Budget Items** Budget by Source

Current Active 2011 - 2012 School Year Update ➕ Add Budget Item

Edit All Update All Cancel Edit All

Budget Items	Qty	Unit	Cost	Budgeted Amount	Program Funding	Notes	Actual
<a href="#">Training for softwar...</a>	<input type="text" value="1"/>	<input type="text" value="Training"/>	<input type="text" value="1,500.00"/>	<input type="text" value="1,500.00"/>	<input type="text" value="Title II-A"/>	<a href="#">In person computer l...</a>	<input type="text" value="1,500.00"/>
<a href="#">Two PD online commun...</a>	<input type="text" value="2"/>	<input type="text" value="Subscrip"/>	<input type="text" value="200.00"/>	<input type="text" value="200.00"/>	<input type="text" value="Gates Grant"/>		<input type="text" value="0.00"/>

To Add a Budget Line Item, click **Add Budget Item**.

The Budget Item entry page displays a Budget by Source table of funds already allocated to this Action Step to help you determine where to pull the funding for your new Budget Item.

The Budgeted Amount may be derived in one of two ways. Either enter the Quantity and Unit Cost (Budgeted Cost will be calculated) or just enter a Budgeted Cost (no Quantity or Unit information.) The Budgeted and Actual amounts will appear on your Action Step Overview, and the total amounts allocated for all Action Steps will roll up to the Strategy and Goal levels of your Plan. Click Submit to return to the Action Step page, or Save and Add Another to reflect additional expenses for this step.

You are not required to assign a funding stream to Budget Items at this point. This is particularly helpful as you are developing your budget for the new year. Unfunded items are easily identified at any time from the Plan Budget page, described below.

Enter the information and save the record to add it to the Action Step.

### Budget by Source

Funding Source	Budgeted (\$)	Actual(\$)	Balance(\$)
Gates Literacy Grant	\$200.00	\$0.00	\$200.00
Title II-A	\$1,500.00	\$1,500.00	\$0.00
<b>TOTAL FUNDS:</b>	<b>\$1,700.00</b>	<b>\$1,500.00</b>	<b>\$200.00</b>

### Add Budget Line Item

2011 - 2012 School Year

Funding Source (11-12)

Unfunded

Title:*	<input type="text"/>
Quantity	<input type="text"/>
Unit	<input type="text"/>
Unit Cost	<input type="text"/>
Budgeted Cost	<input type="text"/>
Actual Cost	<input type="text"/>
Notes	<input type="text"/>

## Plan Budget Page

The Plan Budget page is a funding summary for your entire plan. To view this page, click the Budget link at the top of any page of your plan. You will see a list of all funding streams in the selected year, their Source (Federal, State, LEA), the Budgeted Allocation (assigned to Budget Items), Unencumbered amount, and Total. All amounts are updated immediately when you make changes anywhere in the plan.

To view detailed expenditures for a particular Funding Source, click the arrow next to the Source to roll-out related Action Steps and Budget Items. You can also see if multiple Funding Sources are assigned to a specific Action Step. Please note that an Action Step may appear on the Plan Budget page more than once if it contains Budget Items from multiple Funding Sources.

### Budget

Show 2011 - 2012 School Year ⌵ ⚙ Add Funding Source

PROGRAM	SOURCE	LEA BUDGETED ALLOCATION	UNENCUMBERED	TOTAL	
▶ Gates Grant <a href="#">Edit</a>	LEA	\$9,000.00	\$0.00	\$9,000.00	
▶ General Fund <a href="#">Edit</a>	State	\$855.00	\$392,545.00	\$393,400.00	
▼ Highland Bank Grant <a href="#">Edit</a>	LEA	\$500.00	\$600.00	\$1,100.00	
▼ <b>DISTRICT GOAL:</b> <a href="#">SIG Goal</a> ↳ <b>STRATEGY:</b> <a href="#">Excellence Elementary Transformation Model</a> <b>Action Step:</b> <a href="#">Evaluation System for Personnel</a> <div style="text-align: right;">Highland Bank Grant: \$500.00    Other Funding Sources: \$39,400.00    Total: \$39,900.00</div> Implement a rigorous, transparent and equitable evaluation system for teachers and the principal that takes into account data on student growth, observations of professional practice designed with teacher and principal involvement.					
BUDGET ITEMS	QUANTITY	UNIT	COST	BUDGETED AMOUNT	ACTUAL AMOUNT
Evaluation Packets	4	packet	\$100.00	\$500.00	\$0.00
<b>TOTAL</b>				<b>\$500.00</b>	<b>\$0.00</b>
▶ Safeway <a href="#">Edit</a>	LEA	\$1,725.00	(\$225.00)	\$1,500.00	
▶ SIG <a href="#">Edit</a>	Federal	\$131,300.00	\$1,068,700.00	\$1,200,000.00	
▶ Title I-A <a href="#">Edit</a>	Federal	\$0.00	\$890,000.00	\$890,000.00	
▶ Title II-A <a href="#">Edit</a>	Federal	\$7,500.00	(\$500.00)	\$7,000.00	
▶ Unfunded		\$0.00	\$0.00	\$0.00	
<b>TOTAL</b>			<b>\$150,880.00</b>	<b>\$2,351,120.00</b>	<b>\$2,502,000.00</b>

The final line on the Plan Budget shows the Unfunded Items in your plan. This allows you to easily identify and resolve Action Steps and Budget Items that require funding. Action Steps appear as Unfunded under two circumstances:

1. The Action Step is checked as Requires Funding, but contains no Budget Items
2. The Action Step contains Budget Items that are not yet assigned a Funding Source.

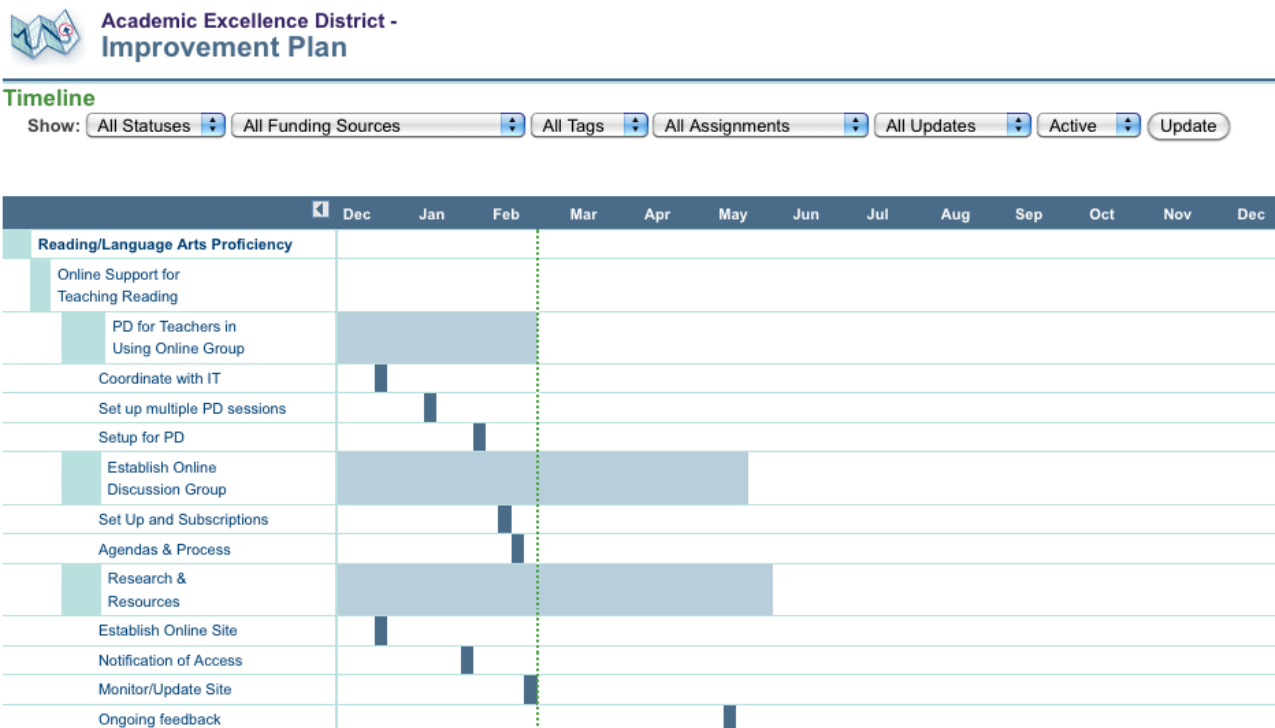
To add items or assign funding sources, click on the Action Step title to go to the Budget Items tab. Once you have determined how you will fund these items and add Funding Sources, they will move to the appropriate source in your budget.

## Plan Modifications

After you finish entering your Plan, you may go back at any time to make edits to a Goal, Strategy, Action Step or Task through the Plan Overview page. You will also want to regularly Update the Status of Action Steps and Tasks, provide Actual Budget amounts, and attach relevant files to provide evidence of implementation and effectiveness.

## Timeline

Once your plan is entered in CAIS, the Timeline view lets you see the distribution of Activities and provides a visual chart of what should be in progress or due throughout the year. The light blue boxes show the span of each Action Step. Dark blue lines designate Task due dates. The dotted green line is the current date. By looking across the school year, implementers can see upcoming due dates, and make sure the distribution of activities is reasonable. The titles of the Action Steps and Tasks are linked to those content pages in CAIS, allowing quick adjustment of due dates, if necessary.



The Timeline may also be filtered by any of the available Plan Overview filters. Users can view just the activities they are responsible for, or view by Tags or Funding Sources.

## Implementation Checklist

The status note histories of all action steps are shown in the Implementation Checklist report. This can be a useful report for the Implementation Team to keep track of progress, or to show to Stakeholders who want to see what steps the school has taken toward improvement.

## Retiring Plan Elements

Your CAIS Plan is a continuous action plan. Some Goals, Strategies and Action Steps may be carried over year to year, some may be completed or no longer valid. Once a plan element is no longer a current reflection of your year's work, you may wish to "Retire" it from view in your ongoing plan. Any element added by the LEA or school may be retired. (State auto-assigned Goals may only be retired by the CDE.) Retiring any element automatically retires everything below it in the Plan: Retiring a Goal also retires all associated Strategies, Action Steps and Tasks. Retiring an Action Step also retires its Tasks, but leaves the associated Strategy and Goal unchanged. Once an element is Retired, it may be viewed by selecting the Show Retired filter at the top of the plan. Any retired element may also be re-activated and brought back into the current plan, along with all of the retired elements below it.

To retire a plan element, click on the title to go to the edit page. You will see the Retire button to the far right of the Save and Cancel buttons.

### Edit a Plan Strategy

Instructions/Description

Title: \*

PD on Differentiated Instruction for Math

[Spell Check](#)

Description: \*

The LEA will provide professional development and support in using differentiated instructional strategies for teaching mathematics.

[Spell Check](#)

Save

Save and Add Another

Cancel

Delete

Retire

Unable to delete this item because it is associated with other items in the system

After you confirm that you want to retire the element, it will be removed from the active plan view.

To Re-Activate retired elements, select Retired from the Active/Retired filter list at the top of the plan and click Update. You will see all retired elements.

<p>► <b>STRATEGY</b></p> <p><b>RETIRED</b> <a href="#">Engage translators for parent nights</a></p>	<p><b>ACTION STEPS:</b></p> <p>2</p>	<p>Estimated Cost: : \$0.00</p> <p>Budgeted: : \$0.00</p> <p>Actual: : \$0.00</p>
<p>Status: Not Reviewed 2/1/2011</p> <p><a href="#">View History</a></p> <p>Recruit translators in major student languages to be available on Parents nights and to translate announcements/invite parents.</p>		

ACTION STEP	RESPONSIBLE	STATUS
<p><b>RETIRED</b> <a href="#">Plan activities for parent groups</a></p> <p>Plan activities for parent groups with different language abilities (Due on 5/26/2011)</p> <p>↳ <b>TASKS:</b> None</p>	Isabelle Improvement	<p>Not Begun 2/1/2011</p> <p>Estimate: \$0.00</p>
<p><b>RETIRED</b> <a href="#">Poll parent groups for translators</a></p> <p>Poll parent groups for translators (Due on 6/10/2011)</p> <p>↳ <b>TASKS:</b> None</p>	Isabelle Improvement	<p>Not Begun 2/1/2011</p> <p>Estimate: \$0.00</p>

Select the title of the element you wish to re-activate to go to the edit page. You will see a history of who retired the item and the date it was retired. Click on the Activate button to place the element back into your current, active Plan. Any associated elements that were retired with this item will also be activated. You may retire them individually, if you don't want them in your active plan.

### Edit a Plan Strategy

Instructions/Description

This Strategy was retired on 09/22/2010 by Don District (District). Need to put this back in the active plan?

Title: \* New Reading Program

Description: \*The LEA will implement a new reading program for elementary struggling readers in each school in need of improvement.

Unable to delete this item because it is associated with other items in the system

[return to Plan](#)

Once you return to your Plan, change the filter back to Active to see that the element has been restored to Active status. The Active view of the plan is the default view, which you will see each time you login to your plan.

Show