

Assets and Needs Review

Questionnaires, Conversation Protocols, and a Reporting Template for District Literacy Planning

An Open Educational Resource

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About These Tools

An assets and needs review is a structured inquiry into how literacy teaching and learning currently work: what is already strong, what is already underway, and where educators and students want more support.

The order of the words is deliberate. Schools are routinely asked to catalog deficits. This process starts instead from the premise that every school already has instructional strengths and committed teachers, and that new work succeeds when it builds on those strengths rather than layering over them. The needs half is equally direct: the protocols ask what gets in the way, what has been tried and set aside, and what teachers do not have time for.

The review gathers four perspectives on overlapping questions: system leaders, school leaders, teachers, and students. Where those perspectives diverge is usually the most useful finding.

These tools are written to be program-neutral. They were developed in the course of supporting a secondary literacy initiative, but nothing in them assumes a particular program, publisher, or grade span. Where a question refers to "this literacy work," substitute the name of your initiative. Where it refers to "the grades in scope," substitute your own grade band.

Tool	Audience	Note
1. System Leader Questionnaire	District or system office leaders	Optional for a single-school review; fold any needed items into Tool 2
2. School Leader Questionnaire	Principal or assistant principal at each participating school	The core tool at any scale
3. Teacher Conversation Protocol	Small groups of teachers	Use as many groups as your scope requires
4. Student Conversation Protocol	Small groups of students	Shaped in part by questions teachers generate in Tool 3
5. Summary Template	Written by whoever ran the review; read by those who will act on it	Use only the headings relevant to your scope

Using These Tools

This section is guidance, not a required sequence. Take what fits your context and leave the rest.

Decide the scale

The review works at several scales, and the tools are the same at each. What changes is how many of them you use.

Scale	What that usually looks like
A single school	A principal or leadership team uses Tools 2 through 5 in their own building. Tool 1 can be skipped, or a few of its curriculum questions folded into Tool 2.
A group of schools	Tool 2 goes to each school leader; teacher and student conversations are held at each site. One summary per school, or one summary with school-level sections.

Scale	What that usually looks like
A district or system	All five tools. Tool 1 goes to the system leader with the clearest view of curriculum; Tool 2 to every participating school.
A department or grade team	Tools 3 and 4 alone can be used by a department chair or teacher leader to surface how reading is working in one part of a building.

Decide who runs it

Someone outside the building can be useful, because teachers and students often speak more freely to a person who does not evaluate them. That is not always feasible, and it is not a requirement. Reviews run by internal staff work when the person leading them is credible with teachers and clear about how the information will be used.

Workable options, roughly in order of how much distance they create:

- A partner organization, regional service agency, or consultant
- A central office staff member from outside the school being reviewed
- A leader from a peer school, with the favor returned
- An instructional coach, media specialist, or counselor who does not evaluate teachers
- A teacher leader or department chair, particularly for conversations with colleagues
- The principal, for questionnaires and for the summary, with someone else facilitating the teacher conversations if at all possible

If the principal must facilitate teacher conversations, say so plainly at the outset, state how the information will and will not be used, and expect teachers to be somewhat more guarded. The data are still worth having. What matters most is that the commitments you make about confidentiality are ones you can actually keep.

Decide the timing

- The most useful reviews finish before the decisions they inform get made. Work backward from that decision rather than from a calendar.
- Beyond that, pick what your context allows. Reviews have been run over a few weeks and over a full semester; both produce usable information.
- If you have a choice, avoid the weeks when your staff and students are most stretched. You know which those are better than any external guidance does.

Gather

- Write down the decision the review will inform, the scope, and who will see the summary. A review not attached to a decision becomes an exercise.
- Confirm any local requirements for student participation before scheduling conversations.
- Give questionnaires a clear return date and send one reminder. Use whatever form tool you already have.
- Hold teacher conversations before student conversations, so teachers' questions can be added to the student protocol.

- Capture exact phrasing. Verbatim language becomes the anonymous quotes in the summary, and those carry a finding further than summary language does.
- Where possible, keep evaluators out of teacher conversations and offer them a debrief of themes instead.
- Ask for a mix of achievement levels in student groups, not only students who are comfortable talking with adults.

Summarize

- Use Tool 5 as the outline, and use only the headings that fit your scope. Fill the factual sections from the questionnaires first, then read the conversation notes for recurring themes.
- Complete the convergence section. Comparing what adults said against what students said is the analytic point of the whole process.
- Include difficult feedback rather than softening it. A summary that omits stated reservations leaves whoever acts on it unprepared.
- Read the draft once for accuracy and once solely for de-identification.

Use

- Share the summary in a meeting rather than by email. Have everyone read it in the room, collect observations before interpretations, then move to decisions.
- Ask what will stop to make room for what starts. Schools in these reviews routinely list several concurrent initiatives, and teachers routinely name that volume as the main obstacle.
- Get it to anyone designing professional learning while there is still time for it to change what they design.
- Share themes back with participating teachers and students. Skipping this is the most common reason a second round of conversations goes badly.
- Keep the summary. It becomes a baseline whether or not you designed it as one.

Confidentiality and de-identification

Three commitments, made up front and kept: individual responses are not attributed; nothing gathered is used in the evaluation of any employee or student, and the team says so aloud at the start of every conversation; any version shared beyond the group that produced it is de-identified first.

For de-identification, replace district and school names with letters, remove all individual names and contact information while retaining role and years of service, describe regional agencies and local partners generically, reduce dates to month and project year, and keep student quotes verbatim with any identifying detail inside them removed. Remove publisher and program brand names as well, as the particular combination of adoptions reported can identify a school or district even when each program is common.

Tool 1. System Leader Questionnaire

For the district or system leader with the clearest view of curriculum and instruction in the grades in scope. A school conducting its own review can skip this tool, or move any questions it still needs into Tool 2.

Suggested introduction: As part of our work together on literacy, we want to understand what is already in place in your district: the curriculum you have adopted, the supports you offer, and the initiatives already underway. Your responses will help us build on what is working rather than duplicate it. Responses will be summarized by role, not by name.

1. Your role or title, and how long you have been in this role.
2. Which schools will participate in this work?
3. Is there a common pacing guide for English language arts, science, or social studies and history? If some but not all, please specify.
4. What core and supplemental programs, textbooks, or materials have you adopted for the grades in scope in each of these subjects? Please include year of adoption if known.
5. Are any of these adoptions out of date, under review, or not currently in use? Please explain.
6. What system-level initiatives are underway that might support this literacy work?
7. What system-level initiatives or demands might compete with it?
8. What professional learning structures already exist in these schools: professional learning communities, late starts, early releases, common planning time, instructional coaches? How often do they meet?
9. Please recommend teachers we might invite to a conversation about literacy in their content area. We are looking for a spread across subjects and across the grades in scope. For each, please provide subject, grade level, school, and contact information.

Recommended teachers are a convenience sample. Describe them that way in the summary, and note which subjects and grade levels were actually represented.

Tool 2. School Leader Questionnaire

For the principal or an assistant principal who oversees instruction, at each participating school. This is the core tool at any scale.

1. Your role or title, your school, and how long you have been there.
2. What is your school's greatest strength in literacy teaching and learning?
3. What are one or two assets or successes that affect student learning in the grades in scope?
4. For students who come in reading below grade level, what supports and interventions does your school offer? Note whether anything is available to students who are only somewhat below grade level.
5. If you have adopted a specific intervention program or set of materials, please include the publisher, the program, and the year of publication if known.
6. What core and supplemental materials do your teachers use in the grades in scope? Please note where teachers are supplying their own.
7. What are the key challenges for curriculum and instruction at your school?
8. What are one or two challenges that affect student learning in these grades?
9. Of the professional development your teachers have engaged in over the past five years, what has had a sustained impact? What do you think made it stick?
10. Did any of that professional development focus on literacy in the content areas? If yes, which?
11. What other initiatives is your school or district engaged in that might affect participation in and implementation of this literacy work?
12. What might support teachers in implementing it? What might get in the way, or is currently hindering participation?
13. How do you see this work fitting with your other initiatives and priorities?
14. What do you need as a school leader to support implementation?
15. Is there anything else you want to share with us or with the people leading this work?

Two questions here consistently produce the most useful answers and are worth a follow-up call if the written response is thin: what made past professional learning stick, and what is currently hindering participation. Principals often answer the second by listing current priorities rather than obstacles; a call can distinguish between initiatives that support the work and initiatives that compete with it for teacher time.

Tool 3. Teacher Conversation Protocol

Groups of 4–8 content-area teachers. Two facilitators. 30–45 minutes.

Opening (read aloud)

As part of our literacy work together, we are interested in learning more about your school's literacy practices, professional learning, and structures for supporting teaching and learning. Information will be shared with whoever is planning this work and with school and teacher leaders. You were identified as someone who would have helpful insights about literacy in your content area. We also hope to talk with a few of your students, and we would like your help deciding what to ask them. Your insights will not be attributed to you individually. They will be shared as themes or as anonymous quotes, and nothing said here is used in anyone's evaluation. We would like to spend about 30 to 45 minutes together.

Introductions

1. Please introduce yourself: your school, the subjects and courses you teach, and the grades you teach.
2. Of the initiatives you have been or are involved in, what has worked best for you as a teacher?
3. What kinds of demands do you have on your time as a teacher?

Reading in your curriculum and instruction

Framing to read aloud: we want to understand how you currently include reading in your content area, before any new professional learning begins.

4. On a weekly basis, how much reading do you assign? What types of texts or source documents do you use, including things like videos, graphs, images, and primary sources?
5. How much of that reading do students do in class? How much is homework? For the homework, what proportion of students actually do it?
6. Do you have go-to instructional strategies for teaching reading in your subject area? What are they?
7. In general, how do your students feel about reading? Are there ways you help students change their views about reading? Tell us about that.
8. What professional learning have you had about reading in your subject area?

Your students

9. What strengths do your students bring to your classroom?
10. What challenges are your students facing this year?
11. We will be setting up conversations with your students. What questions or topic areas related to literacy would you like us to ask them about?

Closing

12. What do you see as strengths in your school?
13. What do you want us to understand about your classroom and your students?

14. Here is our current list of student questions. Is anything missing that you would want us to ask?

Facilitator notes

- Show the student protocol on paper or screen during the final question. Teachers add better questions when they can see what is already there.
- When a teacher names a strategy, ask for a recent example. Terms like scaffolding and chunking mean different things in different classrooms.
- If one or two voices dominate, ask the group whether others see it the same way. Disagreement within a department is a finding worth recording.
- Record the number of teachers, their subjects, and their grade levels.

Tool 4. Student Conversation Protocol

Groups of 6–10 students. Two facilitators. 30–40 minutes. Confirm local permission requirements before scheduling.

Opening (read aloud)

Thanks for talking with us today. We work with your teachers on reading in all subjects, not just English. We want to hear what reading is like for you at school, because your teachers want to know how to help. We are not going to use your names. We will tell your teachers and your principal what students said as a group, but not who said it. There are no wrong answers, and nothing you say affects your grades. You can pass on any question. We will be about half an hour.

Core questions

1. What is your favorite book or story? Why?
2. What does it mean to be a good reader?
3. When was the last time you enjoyed something you read in class? What subject was it, and what grade were you in?
4. What do you read outside of school? How do you read it: phone, e-reader, paper, audio?
5. What makes reading easy or hard for you? What can teachers do in class to help when reading is hard?
6. Do you work in groups in class? Do you feel comfortable working in peer groups?
7. Your teachers want to know how they can help you read in different subjects. How can teachers encourage you to read and understand?
8. What would make you more open to sharing what you read during class?
9. Can you think of a time when you loved reading? What was going on then?
10. Is there anything else you want your teachers to know about reading and about teaching?

Local questions

Add the questions teachers generated in Tool 3 here, and ask them after the core questions. Attribute them honestly: "your teachers asked us to ask you this", which students respond to well.

Question teachers asked us to ask	Which teachers or school

Facilitator notes

- Start with the favorite book question even if it feels slow. It establishes that this is a conversation about them, not a test.

- When a student says reading is boring, ask what made it boring. Students consistently distinguish between texts that are hard and texts that are irrelevant to them; a distinction adults tend to collapse.
- Ask for concrete strategies, not general feelings: what does a teacher actually do that helps?
- Write down exact phrasing. Student language is the part of the summary people remember.
- Record the number of students, their grade levels, and how the group was selected.

Tool 5. Summary Template

One summary per school or district. Four to six pages is typical. Fill each heading; write "none reported" rather than deleting a heading, because absences are findings.

Information provided: what and who

Source	Participants	Roles or grades	Month and year
District questionnaire			
School questionnaire(s)			
Teacher conversation(s)			
Student conversation(s)			

Curriculum, programs, and reading supports

Subject	Programs, textbooks, or materials adopted
English language arts	
Science	
Social studies / history	

Supports and interventions for students reading below grade level

Describe what exists, who delivers it, and when it happens in the schedule. Note explicitly whether anything exists for students only slightly below grade level.

Specific intervention programs adopted

List, or record that none have been adopted.

Reading in classrooms

How much reading gets assigned? How much reading happens?

Draw on both teacher and student accounts. Where they disagree, say so.

Teachers' go-to instructional strategies

List them as teachers named them.

Students' attitudes toward reading

Include examples of what students said they last read and enjoyed.

How can teachers help when students get stuck?

Record students' answers in students' words.

To what extent are teachers' and students' perceptions similar?

The analytic heart of the summary. Name the points of agreement and the points of divergence directly.

Students' strengths and challenges

Strengths	Challenges

Local questions and responses

The questions teachers asked us to put to students, and what students said.

Other feedback

Anything the people acting on this need to know before they begin, including readiness concerns, staffing instability, or explicit statements that the timing is wrong. Record these plainly.

Implications

Three to five rows. Each should connect something learned to something someone would do differently.

What we learned	What it implies

Appendix. Sample Summary (De-Identified)

An abridged summary produced with Tool 5, with all identifiers removed. It is included to show the level of detail and candor that makes a summary useful.

Assets and Needs Review — District A

Information provided

- District and school questionnaires: 1 district administrator and 1 principal
- Teacher conversations: 5 teachers, September of Year 1
- Student conversations: 8 students, September of Year 1

District A has two high schools: High School A1, a comprehensive high school, and High School A2, a smaller specialized school.

Curriculum, programs, and reading supports

There is no current curriculum adoption in English language arts; teachers use classroom novel sets as supplemental resources. Science uses two publisher programs adopted in 2017. Social studies uses a world history program adopted in 2015 and a civics program that has not been renewed because the standards have since changed. There is no common district pacing guide in any of the three subjects.

A reading specialist pushes into certain sections of the introductory English course to support small groups, and helps those teachers select appropriate materials. No comparable support exists in science or social studies. No intervention program has been adopted.

Reading in classrooms

Some form of reading is assigned every day, ranging from 15 to 45 minutes of class time: poems, short stories, novels, primary sources, news articles, graphs, charts, political cartoons, images, and textbooks. Most reading is assigned in class and given class time; unfinished reading becomes homework. Several teachers said they are deliberately assigning less homework this year. In some standard-level classes, the teacher reported that students will not read the textbook unless it is read aloud to them.

Teachers named these go-to strategies: prediction, guiding questions, scaffolding, turn and talk, summaries, outlines, chunking, and check-ins.

Most students said they like to read, or at least enjoy it outside of school. They do not like to read when they are not interested in the topic, when they have little choice in the selection, or when it is not relevant to their lives. Asked what they last read and enjoyed, students named social media posts, a book about money, an informational text on robotics for class, fantasy sports picks online, a class article chosen because the student was interested in the topic, and a book read for pleasure.

Asked how teachers can help when reading gets hard, students said: help us set goals and raise them as we get better; break the reading into chunks; add key details and visualize with us; give us the important vocabulary.

To what extent are teachers' and students' perceptions similar?

Both groups named similar strategies for helping a reader who is stuck: chunking, vocabulary support, and visualizing appeared in both conversations. The groups diverged on interest and relevance: teachers described student reluctance largely as a skill and stamina problem, while students described it almost entirely as a relevance and choice problem. Students also raised homework volume unprompted; teachers had independently begun reducing homework, but students were unaware this was deliberate.

Students' strengths and challenges

Strengths	Challenges
Eager to learn; willing to help each other in class Most will not refuse to read aloud in class Willing to take risks Tremendous energy	Not always prepared to access the current material Materials not always chosen appropriately for them Not equipped with the social and emotional tools to navigate the complexities of life Some students are very quiet, anxious, and afraid to interact With the energy comes a lack of focus Lack of endurance A large learning gap between white and nonwhite students Real behavior management challenges in some classrooms

Local questions

Teachers asked whether students find the texts in the introductory English course interesting. Students: it's okay, not super into it. They like the short stories because even when they are not interested, the stories go quickly. Many of the activities are boring, though one student said the stories made them think.

Asked what else they want teachers to know, students said: if the person in the text is more relatable, it helps; teachers should realize we all learn differently and at a different pace; too much homework that requires reading is a lot right now; be careful how you word questions on homework, because it can be confusing even when I know the answer.

Other feedback

The school is concentrating this year on professional learning communities and multi-tiered systems of support, with a monthly late start devoted to data analysis.

From the school administrator: a long history of leadership turnover has created disjointed practices and no shared vision for curriculum and instruction, with little data analysis in recent years.

From teachers: literacy strategies are secondary to classroom management. "We are worn out. It's not the right time. We do not have the mental bandwidth to do this effectively."

This last statement is the most consequential sentence in the summary. A review that omitted it in favor of a more encouraging tone would have sent facilitators into the district unprepared.

Implications

What we learned	What it implies
Teachers report being at capacity and question the timing	Negotiate scope before the first session. Consider a smaller starting cohort and name what the district will remove to make room.
No current ELA adoption; social studies adoption is out of date	Teachers already source their own texts. Professional learning can build on that autonomy rather than work around a mandated program.
Students name relevance and choice; teachers name skill and stamina	Open with this divergence. It is concrete, local, and reframes "they won't read" as a design question.
Reading support exists only in English classes	Science and social studies teachers have no support structure to lean on. Discipline-specific modeling matters more here than generic strategy instruction.
Leadership turnover has produced disjointed practice	Build in more structural reinforcement than usual: written agreements, named owners, and a plan that survives a leadership change.

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