Education & Wellbeing

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RESOURCE

Multi-Tiered Systems of Support (MTSS) Needs Assessment & Planning Process



For support implementing this tool, reach out to EDC's Education & Wellbeing experts at solutions@edc.org. Learn more about our work at solutions.edc.org.

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How to Use this Tool

Introduction

Building a Stronger, More Aligned System of Support for Every Student

Every district wants students to succeed academically, socially, emotionally, and behaviorally. Achieving that goal requires more than isolated programs or disconnected initiatives—it requires a coordinated, data-informed, and sustainable system of support.

The **MTSS Needs Assessment & Planning Process** is designed to help districts strengthen and align their Multi-Tiered System of Supports (MTSS) by engaging teams in a structured reflection and planning process. Rather than adding "one more initiative," this tool helps districts streamline, connect, and improve the work already happening across schools.

What Is This Process?

This process helps district and school teams:

- Reflect on current MTSS systems and practices
- Identify strengths, gaps, and opportunities for growth
- Prioritize the areas that will have the greatest impact
- Develop actionable goals and implementation plans
- Align initiatives, teams, and resources to improve effectiveness

The process examines key components of an effective MTSS, including:

- Team structures and collaboration
- Tiered academic and wellbeing supports
- Student identification and intervention systems
- Leadership and staff capacity
- Data use and continuous improvement

Equity is embedded throughout the process to ensure supports are inclusive, culturally responsive, and accessible for all students and families.

How Does the Process Work?

The tool is organized into four connected steps:

1. **Needs Assessment Rubric**: Reflect on current systems and practices

2. **Prioritizing Areas of Focus**: Identify high-impact opportunities for improvement
3. **Goal Setting & Action Planning**: Create realistic, actionable goals and next steps
4. **Alignment & Integration**: Streamline initiatives and strengthen collaboration across teams

Teams complete the process collaboratively through discussion, reflection, planning, and analysis of current systems and practices.

Why Is This Process Valuable?

Many districts already have strong programs and committed staff — but efforts can become fragmented, redundant, or difficult to sustain without clear alignment. This process helps districts create a more cohesive and effective system of support.

Through this process, districts can:

- Clarify priorities and focus resources strategically
- Improve coordination across academic and wellbeing initiatives
- Strengthen decision-making through better use of data
- Increase consistency across schools and classrooms
- Reduce duplication and initiative overload
- Build systems that better support students, staff, and families

Most importantly, this process helps districts move from isolated efforts to a unified approach that promotes long-term student success and organizational effectiveness.

Needs Assessment & Planning Process Overview

Objectives of the Process

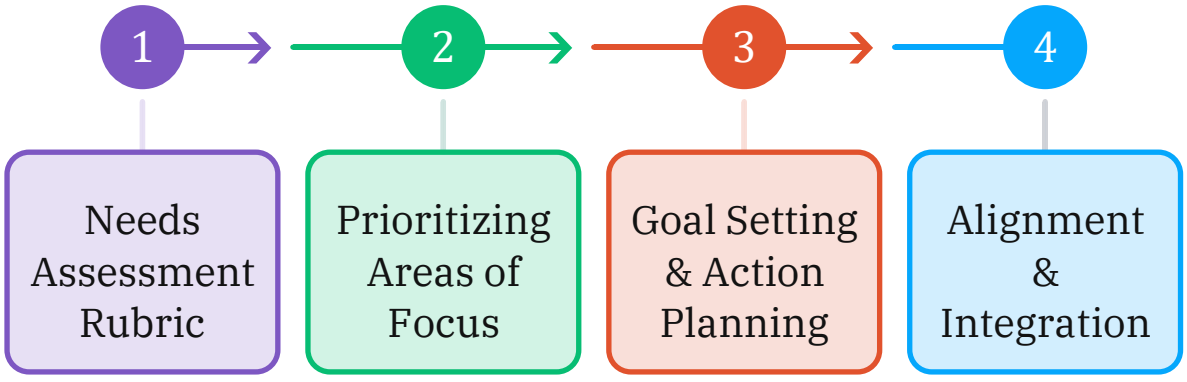
This tool is designed to engage your district team in a four-step process to:

- Identify existing academic, behavioral, social, emotional, and wellbeing supports and initiatives to promote integration and alignment across the school/district.
- Reflect on the key elements of MTSS for academic and wellbeing outcomes and to establish a clear understanding of your current context.
- Prioritize focus area(s), articulate clear goals, and draft an action plan for strengthening your MTSS.

Intended Outcomes

Through this process your team will create clearly defined **priorities** and corresponding **goals** centered in equity which will guide your short and long-term efforts in improving specified elements of your MTSS to support academic success and student wellbeing in ways that are integrated and aligned with your current context and existing school/district efforts.

Steps & Tools

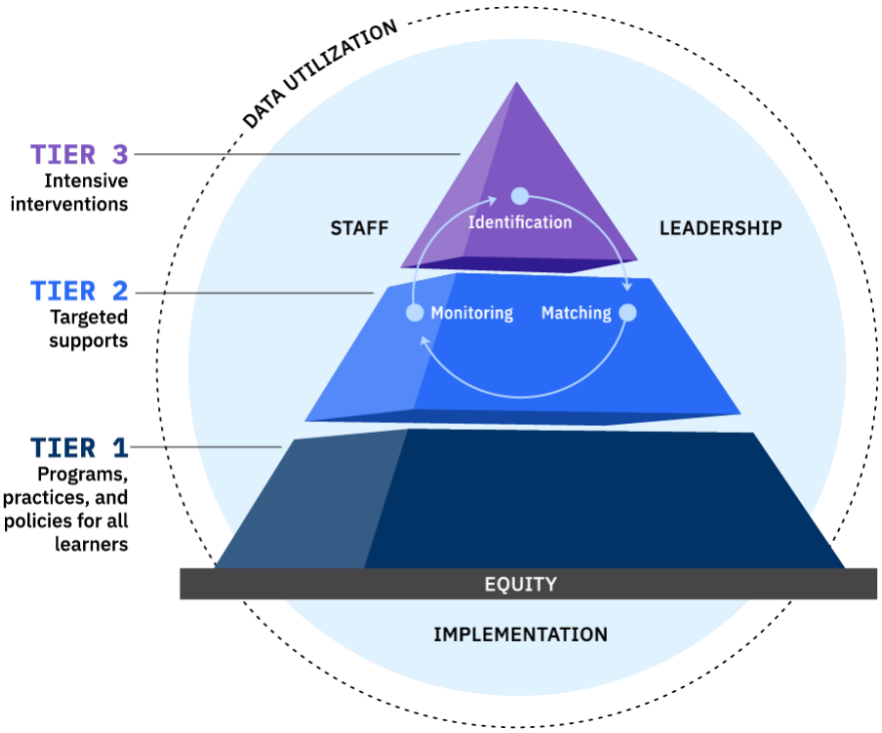


Step 1: Needs Assessment Rubric

Overview

Objective: Reflect on the status of key components of a multi-tiered system of supports (MTSS) within your school or district.

Objective: Identify specific areas of focus which will inform prioritization, goal setting, and action planning for the coming year.



Directions

This tool helps teams reflect on five key parts of an effective MTSS: Team Structure, Tiered Supports, Identification, Matching and Monitoring, Drivers of Effectiveness (leadership, staff, implementation), and Data Utilization. It supports both initial implementation and continuous improvement across academic and wellbeing domains. Use it to identify strengths, guide goal setting, and support action planning.

The tool is not for evaluation. Instead, it promotes honest reflection, discussion, and a shared understanding of your current system. Complete it annually as part of continuous improvement, recognizing that systems evolve over time. Equity should be considered throughout all ratings and discussions.

Rating Scale

0 = Not at all or unsure

1 = Barely, needs significant work and/or there is not currently documented evidence

2 = Somewhat, needs refinement

3 = Completely, consistently, and effectively in place, just needs to be sustained

1. Team Structure			
A team composed of individuals representing diverse roles, backgrounds, and perspectives meets regularly, using a consistent meeting format to reflect, plan, and act in support of an integrated MTSS addressing academic and wellbeing outcomes. Input from community members outside of the team (staff, students, families), as well as other data, is gathered and incorporated into decision-making throughout the year. **Equity Consideration:** The team prioritizes, considers, and uplifts the various identity groups represented in our school, district, and larger community. Every voice is honored and the team operates in an inclusive, culturally, and linguistically respectful manner.			
0 The team does not exist.	**1** A team exists but is not representative and/or does not meet regularly.	**2** A representative team exists and meets regularly, but does not have consistent routines for reflection, planning, and acting in ways that promote an effective MTSS, and input from community members is sometimes included.	**3** A representative team exists which meets regularly and engages in consistent structures for reflection, planning, acting, and incorporating feedback from community members.
NOTES			

2. Tiered Supports			
2a. Consistent and aligned **universal** instruction and supports across academic and wellbeing domains are guided by a documented framework within and across grades in ways that are developmentally appropriate and culturally affirming. Through both explicit teaching and implicit integration, all staff, within all contexts of the school environment, support students' academic learning, engagement, and overall wellbeing in ways that can be clearly articulated and/or identified by students, staff, and families. **Equity Consideration:** The guiding framework is informed by the social identities, cultural practices, and values of the various groups represented in the school community. Universal supports are adaptive and responsive to the needs of all learners across different identity groups.			
0 There is no clear vision or framework guiding universal academic and wellbeing instruction and supports for all students. There is limited or inconsistent teaching and integration of such supports throughout the school/district.	**1** There is a framework and/or a somewhat of a vision guiding universal academic and wellbeing instruction and supports for all students. There is some teaching and integration of such supports throughout the school/district.	**2** There is a documented framework guiding universal academic and wellbeing instruction and supports for all students. Both explicit teaching and implicit integration of such supports exist in various spots throughout the school/district.	**3** There is a documented framework guiding universal academic and wellbeing instruction and supports for all students. Explicit teaching and implicit integration of such supports exist throughout the entire school/district. Students, staff, and families are aware of and can identify consistent practices. The available supports meet the needs of all students.

2b. As needed for specific students at a particular time, **targeted** supports (e.g., targeted academic interventions, skill groups, mentoring, or check-in/check-out supports) are available both inside and outside of the classroom setting. These supports are clearly documented and understood, implemented by trained staff, and properly monitored/managed. **Equity Consideration: Targeted** supports are responsive to the assets, cultural values, and linguistic repertoires of students. Implementation and progress monitoring are critically analyzed through a lens of inclusive, anti-racist practices to identify and address implicit bias and exclusionary practices.			
0 Targeted supports are not available, inside or outside of the classroom for students needing additional academic or wellbeing support at a given time.	**1** Some targeted supports exist, inside or outside of the classroom, for students needing additional academic or wellbeing support at a given time. There is limited documentation and/or insufficient understanding, implementation and monitoring of these supports.	**2** Targeted supports exist inside and outside the classroom for students needing additional academic or wellbeing support at a given time. There is some documentation and/or somewhat consistent implementation and monitoring of these supports. The available supports meet the needs of students who would benefit from targeted supports.	**3** Targeted supports exist, inside and outside of the classroom for students needing additional academic or wellbeing support at a given time. There is clear documentation and effective implementation and monitoring of these supports. The available supports meet the needs of all students who would benefit from targeted supports.

2c. As needed, **intensive** academic and wellbeing supports (e.g., individualized academic interventions, intensive counseling, behavior support plans, or referrals to specialized services) are available to students with elevated needs at a particular time. These supports are clearly documented and understood, delivered by trained staff, and properly monitored/managed.

Equity Consideration: The selection and implementation of **intensive** supports are responsive to the assets, cultural values, and linguistic repertoires of students. Implementation and progress monitoring are critically analyzed through a lens of inclusive, anti-racist practices to identify and address implicit bias and exclusionary practices.

0	**1**	**2**	**3**
Intensive supports are not available for students with significant or intensive academic and/or wellbeing needs.	Limited intensive targeted supports exist for students with significant or intensive academic and/or wellbeing needs. There is limited documentation and/or insufficient understanding, implementation, and monitoring of these supports.	Intensive supports exist for students with significant or intensive academic and/or wellbeing needs. There is some documentation and/or somewhat consistent understanding, implementation, and monitoring of these supports. The available supports meet the needs of some students who would benefit from intensive supports.	Intensive supports exist for students with significant or intensive academic and/or wellbeing needs. There is clear documentation and effective understanding, implementation, and monitoring of these supports. The available supports meet the needs of all students who would benefit from intensive supports.

NOTES

3. Identification, Matching, and Monitoring			
A clear process is in place within the school/each school in the district for identifying students who may benefit from additional academic or wellbeing supports, matching needs to appropriate interventions or instructional supports, and monitoring student progress. Staff, students, and families understand what supports are available and how to refer students and/or request support. **Equity Consideration:** Identification, matching, and monitoring processes are critically analyzed through a lens of inclusive, anti-racist practices that are culturally and linguistically sustaining to identify and address implicit bias and exclusionary practices.			
0 A clear process does not exist for identifying students who need additional support, matching those students to aligned supports, and monitoring those interventions.	**1** An informal process exists for identifying students who need additional support, matching those students to aligned supports, and monitoring those interventions. Some staff, students, and/or families understand what supports are available and how to access that support.	**2** A process exists for identifying students who need additional support, matching those students to aligned supports, and monitoring those interventions. Some staff, students, and/or families understand what supports are available and how to access that support.	**3** A clear and documented process exists for identifying students who need additional support, matching those students to aligned supports, and monitoring those interventions. Staff, students, and families understand what supports are available and how to access that support.
NOTES			

4. Drivers of Effectiveness			
4a. School/district **leaders** demonstrate commitment to creating and sustaining a multi-tiered system of supports for addressing academic achievement and student wellbeing through articulating a clear vision, sharing clear goals, and providing supports (e.g., time, finances, learning, etc.) to those tasked with carrying out the various elements of an effective MTSS. **Equity Consideration:** School/district leaders articulate their vision for equitable academic and wellbeing supports, set clear equity goals, and ensure supports (e.g. time, finances, learning, etc.) are equitably distributed to those tasked with carrying out the various elements of an effective MTSS.			
0 School/district leaders do not demonstrate commitment to creating and sustaining an MTSS addressing academic achievement and student wellbeing through a clear vision, goals, and supports (time, finances, learning, etc.).	**1** School/district leaders demonstrate some and/or inconsistent commitment to creating and sustaining an MTSS addressing academic achievement and student wellbeing through a clear vision, goals, and supports (time, finances, learning, etc.).	**2** School/district leaders demonstrate commitment to creating and sustaining an MTSS addressing academic achievement and student wellbeing through some, but not all of the following: clear vision, goals, and supports (time, finances, learning, etc.).	**3** School/district leaders demonstrate commitment to creating and sustaining an MTSS addressing academic achievement and student wellbeing through a clear vision, goals, or supports (time, finances, learning, etc.) and are active participants on this team.

4b. Staff understand the importance of supporting both academic learning and student wellbeing, can articulate their role in supporting an effective MTSS, and receive professional development and ongoing coaching (internal or external) throughout the year that is guided by the MTSS vision and/or framework.

Equity Consideration: Staff receive professional development and ongoing coaching (internal or external) that supports their understanding of culturally responsive and affirming academic and wellbeing supports, and helps them to critically examine potentially biased and exclusionary existing practices.

0	**1**	**2**	**3**
Staff do not understand the importance of supporting both academic learning and student wellbeing, can not articulate their role in supporting an effective MTSS, and do not receive professional development and ongoing coaching (internal or external) throughout the year.	Some or most staff understand the importance of supporting both academic learning and student wellbeing but don't necessarily understand or see the importance of their own role in helping students develop academic and wellbeing skills and competencies. Limited professional development has been provided on this topic.	Most staff understand the importance of supporting both academic learning and student wellbeing, can articulate their role in supporting an effective MTSS, and receive professional development and ongoing coaching (internal or external) throughout the year.	All staff understand the importance of supporting both academic learning and student wellbeing, can articulate their role in supporting an effective MTSS, and receive professional development and ongoing coaching (internal or external) throughout the year.

4c. Staff implementing academic instruction and wellbeing supports understand the rationale behind the supports they are providing, engage in effective collaboration to provide supports, and monitor the fidelity of **implementation** through tracking, data collection, observations, etc.

Equity Consideration: Staff implementing academic instruction and wellbeing supports examine the supports they are providing to ensure strategies are culturally and linguistically sustaining for the students they are intended to support.

0	**1**	**2**	**3**
Staff implementing academic instruction and wellbeing supports do not understand the rationale behind the supports they are providing, do not engage in effective collaboration to provide supports, and do not monitor the fidelity of implementation through tracking, data collection, observations, etc.	Some staff implementing academic instruction and wellbeing supports understand the rationale behind the supports they are providing, engage in effective collaboration to provide supports, and/or monitor the fidelity of implementation through tracking, data collection, observations, etc.	Most staff implementing academic instruction and wellbeing supports understand the rationale behind the supports they are providing, engage in effective collaboration to provide supports, and monitor the fidelity of implementation through tracking, data collection, observations, etc.	All staff implementing academic instruction and wellbeing supports understand the rationale behind the supports they are providing, engage in effective collaboration to provide supports, and monitor the fidelity of implementation through tracking, data collection, observations, etc.

NOTES

5. Data Utilization			
5a. The school/district collects a variety of **outcome data** related to academic performance, engagement, and student wellbeing (e.g., assessment scores, attendance, course performance, SEL assessment), disaggregates and analyzes the data, appropriately shares data with stakeholders (teachers, administrators, parents, etc.), and uses the data to inform, monitor and improve supports. **Equity Consideration:** The school/district uses data metrics, data collection techniques, and communication strategies that are culturally and linguistically sustaining for all students, staff, and families.			
0 The school/district does not collect a variety of "outcome data" related to students' academic performance, engagement, and their wellbeing.	**1** The school/district collects a limited amount of data related to students' academic performance, engagement, and their wellbeing, and engages in some of the following: disaggregates and analyzes the data, appropriately shares data with stakeholders, and uses the data to inform, monitor, and improve supports.	**2** The school/district collects "outcome data" related to students' academic performance, engagement, and their wellbeing, and engages in most of the following: disaggregates and analyzes the data, appropriately shares data with stakeholders, and uses the data to inform, monitor and improve supports.	**3** The school/district collects a variety of "outcome data" related to students' academic performance, engagement, and their wellbeing, and engages in all of the following: disaggregates and analyzes the data, appropriately shares data with stakeholders, and uses the data to inform, monitor and improve supports.

5b. The school/district collects a variety of "**fidelity data**'' to inform and evaluate academic and wellbeing programs, practices, and instructional approaches and make modifications to implementation as needed.

Equity Consideration: The school/district examines fidelity data through an equity lens, disaggregating data to ensure equitable implementation of academic and wellbeing programs and practices.

0	**1**	**2**	**3**
The school/district does not collect "fidelity data'' to inform and evaluate academic and wellbeing programs, practices, and instructional approaches.	The school/district collects a limited amount of "fidelity data'' and rarely uses this data to inform and evaluate academic and wellbeing programs, practices, and instructional approaches, and/or make modifications to implementation as needed.	The school/district collects "fidelity data'' and sometimes uses this data to inform and evaluate academic and wellbeing programs, practices, and instructional approaches and/or make modifications to implementation as needed.	The school/district collects a variety of "fidelity data'' and consistently uses this data to inform and evaluate academic and wellbeing programs, practices, and instructional approaches, and/or make modifications to implementation as needed.

NOTES

RATINGS

Focus Area	Rating
1. Team Structure	
2a. Tiered Supports: Tier 1	
2b. Tiered Supports: Tier 2	
2c. Tiered Supports: Tier 3	
3. Identification, Matching, and Monitoring	
4a. Drivers of Effectiveness: Leaders	
4b. Drivers of Effectiveness: Staff	
4c. Drivers of Effectiveness: Implementation	
5a. Data Utilization: Outcome Data	
5b. Data Utilization: Fidelity Data	

REFLECTIONS

Based on your discussion and these rubric ratings, record the following to inform your next steps.

Our greatest areas of ***strengths*** are:

The areas that show the most significant ***gaps*** are:

The areas where there are most promising ***opportunities*** for improvement are:

Step 2: Prioritizing Areas of Focus

Overview

Objective: Use the information gained through Steps 1 and 2 of the Needs Assessment process to prioritize areas of focus for the upcoming year.

Outcome: Identify 1-3 elements of an effective MTSS (outlined in the Needs Assessment Rubric) on which to focus and set aligned goals to guide your work for the upcoming year.

Directions

1. Refer back to the ratings and reflections from your Needs Assessment Rubric.
2. Knowing not all things can be tackled at once, prioritize the identified gaps and opportunities to determine which you will focus on this year.

Discussion Prompts

Use the questions and "Effort vs Impact" matrix to guide a discussion among your team.

- **Feasibility:** Do we have the staff, financial support, and organizational structure needed to successfully make change in this area?
- **Readiness:** Do we have the motivation and willingness to commit resources to address the given focus area?
- **Potential Impact:** Do we think you are likely to see change based on your efforts?
- **Match for the Need:** If successful, will this focus area be addressing a known need or gap in our school community?

Based on the discussion, which of the elements of an effective MTSS do you think your team is best poised to focus on this year?

- Team Structure
- Tiered Supports: Tier 1, Tier 2, Tier 3
- Identification, Matching, and Monitoring
- Drivers of Effectiveness, Leaders, Staff, Implementation
- Data Utilization

Step 3: Goal Setting and Action Planning

Overview

Objective: Use the information gained through Steps 1, 2, and 3 of the Needs Assessment process to draft goals for your selected focus area(s).

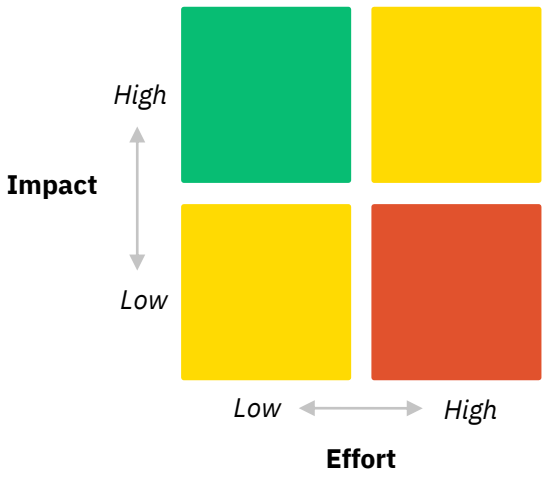
Outcome: Draft 1-3 goals aligned to each of your area(s) of focus which will be used to guide your work for the upcoming year.

Directions

For each of the **focus areas** you identified as priorities in the previous section:

1. Draft a **goal** which has:
    a. clear and specific action steps,
    b. a lead who has the time and capacity to guide the work and
    c. a timeframe that is realistic.
2. Draft **"success criteria"** to envision what success will look like for students, staff, and/or the school or district when this goal is achieved.
3. Identify possible **data** that can be collected to measure the impact of the goal, as well as fidelity of implementation.
4. Record considerations, questions, and resources that might guide or support **potential next steps**.

When drafting goals and action steps consider balance between impact and effort:



Example

Focus Area

Data Utilization—leveraging existing outcome data

Goal

Our team will engage in two data review cycles (winter and spring) to collect, analyze and act on existing student outcome data (academic performance, attendance, discipline referrals, student surveys, and climate data).

Action Step	Lead	Timeframe	Notes
Inventory existing data sources and determine which data sources are missing	MTSS Team	Summer 2024	
Select data collection tools	MTSS Team	Fall 2024	
Develop plan for rolling out data collection tool (including training staff)	Principal and MTSS Team	Winter 2024	
Collect data	All teachers	Spring 2025	
Determine how data will be reviewed and shared with others (e.g., parent-teacher conferences, student support team or SST meetings, grade level meetings, etc.)	Principal and MTSS Team	Fall 2024 Winter 2024 Spring 2025	

Success Criteria: If we achieve this goal, what will success look like…	
For students? ▪ Academic and wellbeing needs will be identified and addressed ▪ Disparities in student needs by subgroup will decrease ▪ Supports will be consistent across demographic subgroups	**Impact** ▪ Academic growth measures ▪ Attendance ▪ Engagement indicators, Culture/Climate Surveys (4th-12th) ▪ Implementation
For staff? ▪ Staff will feel confident that student needs are being identified and addressed ▪ Staff will leverage *data to inform their practices*	
For the school/district as a whole? ▪ Students, staff, and families will express confidence in the school's ability to identify and address needs ▪ Students, staff, and families will feel consistently supported ▪ Disparities in supports across subgroups will be eliminated	

Our MTSS Goals:

Focus Area 1

Goal 1

Action Step	Lead	Timeframe	Notes

Success Criteria: If we achieve this goal, what will success look like...	
For students?	**Impact**
For staff?	
For the school/district as a whole?	

Our MTSS Goals:

Focus Area 2

Goal 2

Action Step	Lead	Timeframe	Notes

Success Criteria: If we achieve this goal, what will success look like...	
For students?	**Impact**
For staff?	
For the school/district as a whole?	

Our MTSS Goals:

Focus Area 3

Goal 3

Step 4: Alignment & Integration

Overview

Objective: Reflect on and document the currently existing goals, initiatives, and teams/working groups related to academic and wellbeing supports.

Outcome: Determine potential areas of alignment/misalignment and collaboration/redundancy to promote streamlined, integrated, and effective progress.

Directions

1. Identify all school/district priorities that have academic and wellbeing development as part or all of their focus. Record any known corresponding initiatives aligned with those priorities.
2. Identify all existing teams, working groups, committees, etc. that have academic and wellbeing development as part or all of their purpose.
3. Characterize the main features of each team
    a. **Purpose:** Why was this group formed and why does it meet?
    b. **Measurable outcomes/objectives:** What kind and level of change, improvement, etc. is expected?
    c. **Target audience:** Who is expected to benefit from the efforts of this group?
    d. **Meeting schedule:** How often, when, and for how long does this group meet?
    e. **Membership:** Who is on this committee or group? How/by whom was membership determined?
    f. **Connection to improvement goals:** How do the efforts of this group relate to the short- and long-term priorities of the school or district?
    g. **Priority or need:** How important is this group to the school? How aware is the larger community about this group and the work being done?
4. After completing the charts below, consider the ways in which work could be streamlined, teams could collaborate, and efforts could be aligned.

Helpful Resource

> **Integration and Alignment Technical Guide**

What priorities already exist in our school/district?
Example: *Middle school is focused on improving culture and belonging.*

What initiatives/special projects focus on strengthening MTSS structures & processes?
Example: *Middle school is rolling out Project Wayfinder and formatting Advisory*

Alignment and Integration: Existing Teams & Working Groups

(1 = Low, 5 = High)

Team	Purpose	Expected Outcome	Target Audience	Schedule or Meeting Cadence	Team Members	Alignment w/ Mission, Goals, Improvement Plan	Priority
Example: *School Culture Team*	*Develop and facilitate school wide celebrations and events*	*School-wide events that increase belonging and promote community*	*Students, staff and families*	*Monthly*	*Assistant principal, classroom teachers, counselor, ABA*	*1 2 3* ***4*** *5*	*1 2 3* ***4*** *5*
						1 2 3 4 5	1 2 3 4 5
						1 2 3 4 5	1 2 3 4 5
						1 2 3 4 5	1 2 3 4 5
						1 2 3 4 5	1 2 3 4 5

Next Steps: Share gained insight with relevant stakeholders. When prioritizing, setting goals, and developing an action plan refer to the above to ensure consistency and collaboration and to avoid redundancy and/or conflicting efforts.

Alignment and Integration: Re-Organize

Now get organized! Based on your priorities from Step 2, your action plan from Step 3, and the analysis of what teams you have in place and their role, determine how to re-organize your teams to work more efficiently and towards your goals.

Consider:

- **Redundancy:** Are there teams with overlapping responsibilities? Is there more than one team working on the same goal? If so, will efforts across teams be reinforcing or redundant?
- **Integration/Collaboration:** Can any two or more teams working on similar or the same goals and collaborate to integrate efforts?
- **Alignment:** Do team structures align with goals? Are teams working towards our priorities and goals or are they misaligned to our priority and goals?

Record changes to team structures:

Team	Change	Notes
	☐Continue ☐Merge ☐Reconfigure ☐Phase out	
	☐Continue ☐Merge ☐Reconfigure ☐Phase out	
	☐Continue ☐Merge ☐Reconfigure ☐Phase out	

	☐Continue ☐Merge ☐Reconfigure ☐Phase out	
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