



EdSERT Implementation Guide for Facilitators

**Practical Implementation and Planning Information to Encourage Educator
Participation in EdSERT Using a Professional Learning Communities Model**

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Introduction

Building students' social and emotional competence (SEC) is one important goal of education. Students benefit from stronger social and emotional skills both in and out of school.¹ Strong social and emotional skills have positive long-term effects for students, too.² As educators, you play an important role in helping students develop their social and emotional skills. When you feel more confident in supporting students with these skills, you create more positive learning environments, and help your students achieve better outcomes.^{3, 4, 5}

The Educator Social-Emotional Reflection and Training (EdSERT) program can help you learn more about SEC and give you ideas on how to promote social and emotional learning (SEL) in your classroom. When educators learn with EdSERT, it can support their overall well-being by helping them build closer relationships and connections with their colleagues. This guide serves as a recommended “how-to” for educator participation in EdSERT using professional learning communities (PLC) as the model. Consider reviewing and using the EdSERT Quick Guide to Implementation and Planning (Appendix A) as an overview of the main components in this guide.

Getting Started

To get started with EdSERT, you'll need a facilitator. We recommend having a lead teacher, school psychologist, social worker, or counselor serve as the facilitator. As the facilitator, be intentional about the time you plan for your educators to reflect on and practice the skills and strategies they learn. Use this guide and the EdSERT Manager's course, accessed through the Aperture System, to build an implementation plan that allows for this to occur. Educators also build their comfort and confidence with the EdSERT material by building community and sharing ideas with their colleagues.^{3, 6} Key planning considerations are outlined in the remainder of this guide.

Approach & Sequence

Educators learn about eight different social and emotional competencies with EdSERT. We recommend reviewing all eight competencies across two school years. With this model, your educators have more time to build their confidence, review the content, connect with others, and grow their skills. A different option is to review all eight competencies during one school year.

We recommend reviewing the competencies in this order:

1. Optimistic Thinking
2. Self-Awareness
3. Self-Management
4. Social Awareness
5. Relationship Skills
6. Goal-Directed Behavior
7. Personal Responsibility
8. Decision Making

Based on the needs in your school or program, you can adjust the sequence of these competencies, too. For example, depending on your DESSA data, you might start with Self-Awareness if it's one of your students' greatest strengths. You could then move on to the competency that your DESSA data suggest as your students' greatest need, and then continue through the competencies. Other options are to match the sequence to an SEL program you're using at your school, or work with your educators to choose the order that fits the strengths and needs of your school or program best. Ultimately, the implementation sequence is flexible. We want this to be meaningful for you and your team. If you have questions or would like support, please contact your Aperture Success Team member.

Privacy

Participating in EdSERT requires educators to engage in honest self-reflection which can make some feel vulnerable. As the facilitator, it is important to create an environment of trust and supportive collaboration. In group settings, you might focus your discussions more on SEL for students and adults rather than personal topics. Additional considerations for creating an open, supportive, and non-threatening environment include:

1. Treating your educators' self-assessment results as private and confidential. Educators can voluntarily share their ratings, at their discretion, as part of their group sharing or with a trusted colleague.
2. Encouraging your educators to use the self-assessment results to improve their practices and build connections with others.
3. Encouraging your educators to take a second self-assessment to measure their growth when they feel ready to.

Accountability

It's important to gather feedback from your educators about their participation in EdSERT. Consider collecting feedback from your educators to ensure EdSERT is meaningful and necessary adjustments are made in a timely manner.⁶ You might use the satisfaction survey included in Appendix B (<https://bit.ly/3mZkey4>) or adapt a measure such as the Usability Rating Form—Intervention Revised (<https://urp.uconn.edu/forms/>) to get feedback on improving EdSERT implementation in your school or program.



Scan QR Code
for Survey
in the Appendix



Scan QR Code
for Usability
Rating Form

Participation Expectations

EdSERT Facilitator Responsibilities

Note In the Aperture System, EdSERT Facilitators are referred to as EdSERT Managers. As the EdSERT Facilitator, you serve as the EdSERT Manager for your district.

- Complete the EdSERT Manager course in the Aperture System.
- Facilitate EdSERT participation in your school.
- Ensure educator access to EdSERT. Troubleshoot issues as necessary.
- Using relevant data, select the competencies you will review during the school year.
- Facilitate educator learning through the selected competencies in the EdSERT program.
- Monitor educator progress through modules using EdSERT Completion Reports.
- Organize and support large- and small-group professional learning community (PLC) learning opportunities.
- Support educators' use of EdSERT strategies.

Educator Responsibilities

- Complete the Introduction to EdSERT module.
- Complete the assigned modules.
- As part of each competency module:
 - Review the content and complete the end of module check-in.
 - Complete the self-reflective assessment.
 - Complete the personal development plan.
 - Choose and implement strategies.

System Setup

New Aperture System Users

Aperture Education will send you an email invitation from platform@apertureed.com with the subject line “Welcome to Aperture!”

- Select the Create Account button in the email to open the activation window.
- Enter a password for your account.
- Select the checkbox to agree with the Privacy Policy and Terms and Conditions.
- Select Activate.

As an EdSERT Facilitator you have been added to the Aperture System as a **Site Leader**. Site Leaders have access to additional reports and administrative features that allow you to impersonate educator accounts for troubleshooting, view the EdSERT training completion report, and view schoolwide data for all staff and students. For a full list of features that you have access to as a Site Leader, [please refer to this document](#). You can also view a quick video walkthrough of the Site Leader role [here](#).

Now that you have access to your Aperture System account, you will need to ensure that the teachers participating in the EdSERT program also have access to the platform. To verify that your teachers have access, please follow the steps below:

Verifying that your educators have access to the Aperture System

1. [Log in to the Aperture System](#).
2. Click on the settings gear in the top right corner, then click **Admin**.
3. In the left side menu, click **Staff**.
4. On this screen, you can search for specific educators at your school to verify that they have an active Aperture System account. You will see a column titled **Status**, which will indicate whether the specific educator has activated their account. If the status column says **Active**, then this educator has already successfully logged in to the Aperture System. If it says **Invite**, then this educator has an account but has not yet been invited to create their password and log in. You can click the **Invite** button to trigger the invite email to this educator. They will receive an email that prompts them to create a password and log in. If you need to send invites to all educators, you can also click the **Batch Invite** button; then select **Educator** under **Roles**. Then click **Send Invites** to send invitations to all educators that have not logged in yet. [Alternatively, you can reach out to your school/district IT team that is responsible for managing your rosters in the Aperture System to verify that all of the necessary educators have accounts.]
5. If you find that some or all of the educators participating in the EdSERT program do not have Aperture System accounts, please follow the instructions below to add them.



Adding new educators to the Aperture System

Option 1 (Preferred): Adding new educators via automated SIS integration. Learn more about SIS integrations [here](#).

1. Work with your district IT team to add the necessary educators to your existing roster integration file. To begin the process, email DataTeam@ApertureEd.com with your IT team copied on the email, and provide the details for educators that need to be added to the system. To make this process easier, you may not need to provide individual names of educators; you can inform your IT team that you need to add a specific group of educators to the file. For example, “All teachers in grades K–4 at Washington Elementary School.”
2. Once the new educators have been successfully added to the automated roster integration, you can [send them invitations to log in by following these instructions in the Support Portal](#).

Option 2: Manually adding Training Only users to the Aperture System.

If you're not able to include the educators as part of your automated rostering process, your Program Administrator will need to import them into the Aperture System using a .csv template.

Note As a Site Leader, you will not have the ability to import users. You will need to collaborate with your Program Administrator and/or district IT team to complete these steps. This [video](#) walks you through the process.

1. Select the gear icon in the top right corner, then select **Admin** from the drop-down menu.
2. In the left sidebar menu select **Imports**.
3. Select the radio button for **Training Only Users**, then click **Continue**.
4. Select and open the **Training Only User Import** template ([at the bottom of this Support Portal article](#)).
5. Download and open the import template.
6. Populate your file according to the column headers on row 1. Important, **DO NOT EDIT ROW 1**. Row 1 includes required headers that must remain intact for the import to be successful.

Note Site names included on the .csv file must match site names that exist in the Aperture System, otherwise those staff members will not be added during the CSV upload process.

7. Save the file as a .csv on your computer.
8. After clicking **Continue** from the previous screen in the Aperture System, click **Browse** and search for your saved .csv file.
9. Select the **Upload CSV** button on the right side.
10. If you are ready to invite staff members, select the **Invite** button from the **Staff** list on the left-side menu.
11. Verify that these site leaders are now uploaded to the Aperture System from the **Staff** list on the left-side menu.

Implementation Overview

EdSERT Planning and Preparation

- Using relevant school data, decide on the order of EdSERT competencies to review.
- Communicate the plan for which competencies you'll review during the school year with your educators. Consider using the templated language provided in Appendix C.

All EdSERT material is in the Aperture System. Use the following process to ensure that you have access to the EdSERT material in the Aperture System.

Steps for accessing EdSERT material as a facilitator:

1. Log in to the Aperture System
2. On your upper navigation bar, click the **Academy** tab and navigate to Training.
3. Scroll to the EdSERT Manager course and click **Start Course**.

Note After you have begun the EdSERT Manager course, you will be able to access and resume the course by using the EdSERT Manager link in the Aperture System Training drop-down.

If educators are having difficulties accessing EdSERT in the Aperture System, here are troubleshooting options.

The Academy tab is not on my Dashboard.	Reach out to support@apertureed.com .
An educator can see the EdSERT Course Curriculum headings only.	It is likely the educator has not yet started the course on their Dashboard. Direct your educator to access the course through the Training link first.
An educator forgot to print their module badge.	Educators can always re-enter a module. If they have completed the content for that module, they can navigate directly to the Completion Badge.



Facilitating EdSERT

For educators, EdSERT is most meaningful when they have dedicated time to reflect on and practice the skills and strategies they learn; this gives time for educators to connect with their colleagues, too.^{5,6}

During each competency cycle, set aside time and facilitate reviewing the material through:

- An initial meeting to introduce EdSERT or each individual competency.
- One to three small-group PLC meetings to support your educators' use of EdSERT strategies, reflect on strategies they have used, connect with colleagues, and identify areas for growth.

Meeting Structure: Consider running EdSERT meetings in person, through asynchronous discussion using online forums and discussion boards (optional), or a mix of both. Example meetings structures are outlined in the proceeding sections. Ultimately, it is best to consider how to be intentional about providing opportunities for your educators to review their personal development plans and strategies with others. You can also offer discussion questions to your educators to facilitate conversations. The EdSERT Discussion Guides in the EdSERT Manager's Course can be used to support this. Additional examples include:

- Do you feel that your self-reflective assessment on the EdSERT teaching practices has helped you grow? Do the practices seem more important or relevant from the first time you considered them?
- Do you think your students, their families, or your colleagues have noticed a difference in your teaching practices?
- Do you want to continue using these practices?
- Did your understanding of social and emotional competence (or a specific competency area) change or improve?
- If you did not feel like you experienced growth, what can you do differently next time? Practice the strategy more faithfully? Practice the strategy more frequently? Or for longer?
- What changes in student behaviors have you noticed as a result of what you've learned by participating in EdSERT?
- Do you feel more confident completing DESSA ratings?



Competency Review: Eight Competencies Across Two School Years

One way for your educators to participate in EdSERT using PLCs is to schedule across two school years, covering four competencies each year. If you're using this method, you might consider having your educators participate in quarterly and small-group PLC meetings for reflection, growth, and to build community with each other. When beginning a new competency, educators can complete their first self-assessment. They can complete a follow-up self-assessment for that competency to measure their growth when they feel ready to.

If you are unsure about the sequence to use for EdSERT, review the Approach and Sequence sections at the beginning of this document for more information. Depending on the sequence that works best for you and your educators, adjust the following quarterly implementation example. If you are meeting in-person, your educators will need their laptops or tablets to access the EdSERT material. If you have questions about accessing EdSERT through the Aperture System, review the System Setup section in this guide.

Outline for Implementing Eight Competencies Across Two School Years

Quarter 1, Year 1	Introduction to EdSERT; Optimistic Thinking (Example); Small Group PLC Meeting x 2
Quarter 2, Year 1	Competency 2; Small Group PLC Meeting x 2
Quarter 3, Year 1	Competency 3; Small Group PLC Meeting x 2
Quarter 4, Year 1	Competency 4; Small Group PLC Meeting x 2
Quarter 1, Year 2	Competency 5; Small Group PLC Meeting x 2
Quarter 2, Year 2	Competency 6; Small Group PLC Meeting x 2
Quarter 3, Year 2	Competency 7; Small Group PLC Meeting x 2
Quarter 4, Year 2	Competency 8; Small Group PLC Meeting x 2



Quarter 1

Note Use these suggested meeting structures to guide your EdSERT facilitation planning.

Meeting 1: Introduction to EdSERT (60 minutes)

- **Welcome & Introduction** to participation in EdSERT.
 - Based on your implementation outline and model, provide your educators with background information for how they'll participate in EdSERT.
- **Establish** group norms with your educators and highlight the focus of building connections with colleagues.
 - Consider using your schoolwide norms if you have them, or develop them as a group. These norms could focus on how your educators can be engaged, responsible, and respectful—focusing specifically on ways to foster their growth and connection with others.
- **Complete** the Introduction to EdSERT module.
 - Have your educators enroll in EdSERT through the Aperture System. For more information on this, refer to the System Setup section in this guide or contact your Aperture Success Team member.
 - After enrolling, have your educators complete the Introduction to EdSERT module individually.
- **Develop** goals with your educators for completing EdSERT.
 - Working with your educators, establish group and individual goals for their participation in EdSERT.
 - Consider recording these goals somewhere that you can refer to them during later meetings.
- **Review and outline** the competency order and meeting structure.
 - Each meeting outline organizes the material using this suggested structure: Debrief, Define, Explore, Plan.
 - If this meeting outline doesn't work for you, consider updating it based on what works best in your school or program.
 - Establish how educators will participate in EdSERT. This could be through in-person group methods, PLCs, individually, online, both individually and online, or through a different method.



Meeting 2: Competency 1 (Optimistic Thinking, for example; 60 minutes)

- **Begin** the session.
 - Review the group norms you created.
 - Consider using a group check-in or icebreaker activity.
- **Debrief**
 - Provide an opportunity for your educators to discuss reflections or questions from the previous session.
- **Define** session goals.
 - Have your educators set individual goals for themselves for this competency.
 - Understand the competency content.
 - Complete the self-assessment.
 - Complete the personal development plans.
 - Plan their use of strategies.
 - *Optional*: as a group, establish group goals for this competency.
 - Meet a specific number of times during the next two months as a small group or whole group.
 - Use a specific number of strategies from this competency.
- **Explore** competency content using EdSERT through the Aperture System.
 - As a large group or in your educators' PLC groups, review the competency professional development material.
 - Use the Optimistic Thinking Discussion Guide in the EdSERT Manager's Course as support.
 - Have your educators complete the Optimistic Thinking Self-Assessment.
 - Have your educators complete the Optimistic Thinking Personal Development Plan.
 - Identify areas of strength, emerging practices, and growth opportunities.
- **Plan**
 - After completing their self-assessment, have educators select Optimistic Thinking strategies to use.
 - Plan their use of the SEL strategies they choose, such as:
 - *I will use or practice this strategy [a specific number of times per week or day; on a specific date; at a specific time of day].*
 - *I will remind myself to use this strategy by _____.*
 - *I will track my use of this strategy by _____.*
 - *I will review my use of this strategy on the following date: _____.*
 - *Other considerations: _____.*
- **End** of Group Reflection.
 - How will you use this material in your classroom?
 - What do you think will be successful?
 - What will be some barriers?
 - What support do you need?



Meeting 3: *Optional* Small Group PLC Competency Check-In (30 minutes)

- **Begin** the session.
 - Review the group norms you created.
 - Consider using a group check-in or icebreaker activity.
- **Debrief**
 - Reflections or questions from previous meetings.
 - Reflections or questions from implementation.
- **Define** goals for this session.
 - Discuss personal reflections and thoughts from this competency.
 - Discuss personal development plans.
 - Check-in on strategy use.
 - Problem-solve challenges.
- **Explore** implementation.
 - Review personal development plans.
 - Use the discussion guides in the EdSERT Manager’s Course as support.
 - Share use of strategies.
 - Identify what’s been going well.
 - Identify areas for improvement.
 - Recommendations for adapting or modifying strategy use.
 - Problem solve implementation challenges.
- **Plan**
 - Select or update which Optimistic Thinking strategies to use.
 - Plan continued use of strategies, such as:
 - *I will use or practice this strategy [a specific number of times per week or day; on a specific date; at a specific time of day].*
 - *I will remind myself to use this strategy by _____.*
 - *I will track my use of this strategy by _____.*
 - *I will review my use of this strategy on the following date: _____.*
 - *Other considerations: _____.*
- **End** of Group Reflection.
 - What has been a highlight from learning with EdSERT?
 - What has been the most useful or helpful for you?
 - What has been challenging?



Meeting 4: *Optional* Small Group PLC Competency Check-In (30 minutes)

- **Begin** the session.
 - Review the group norms you created.
 - Consider using a group check-in or icebreaker activity.
- **Debrief**
 - Reflections or questions from previous meetings.
 - Reflections or questions from implementation.
- **Define** goals for this session.
 - Discuss personal reflections and thoughts from the first EdSERT competency.
 - Discuss personal development plans.
 - Check-in on strategy use.
 - Problem-solve challenges.
- **Explore** implementation.
 - Review personal development plans.
 - Use the discussion guides in the EdSERT Manager’s Course as support.
 - Share use of strategies.
 - Identify what’s been going well.
 - Identify areas for improvement.
 - Recommendations for adapting or modifying strategy use.
 - Problem solve implementation challenges.
- **Plan**
 - Select or update which Optimistic Thinking strategies to use.
 - Plan continued use of strategies, such as:
 - *I will use or practice this strategy [a specific number of times per week or day; on a specific date; at a specific time of day].*
 - *I will remind myself to use this strategy by _____.*
 - *I will track my use of this strategy by _____.*
 - *I will review my use of this strategy on the following date: _____.*
 - *Other considerations: _____.*
- **End** of Group Reflection.
 - What has been a highlight from learning with EdSERT so far?
 - What has been useful or helpful for you?
 - What has been challenging?



Quarter 2

Note Use these suggested meeting structures to guide your EdSERT facilitation planning.

Meeting 1: Competency 2 (Based on Need; 60 minutes)

- **Begin** the session.
 - Review the group norms you created.
 - Consider using a group check-in or icebreaker activity.
- **Debrief**
 - Reflections or questions from learning with EdSERT.
- **Define** goals for this session.
 - Have your educators set individual goals for themselves for this competency.
 - Understand the competency content.
 - Complete the self-assessment.
 - Complete the personal development plans.
 - Plan their use of strategies.
 - *Optional*: as a group, establish group goals for this competency.
 - Meet a specific number of times during the next two months as a small group or whole group.
 - Use a specific number of strategies from this competency.
- **Explore** competency content using EdSERT through the Aperture System.
 - As a large group or in your educator’s PLC groups, review the competency professional development material.
 - Use the discussion guides in the EdSERT Manager’s Course as support.
 - Have your educators complete the self-assessment.
 - Have your educators complete their personal development plan.
 - Identify areas of strength, emerging practices, and growth opportunities.
- **Plan**
 - After completing their self-assessment, have educators select which SEL strategies to use:
 - *I will use or practice this strategy [a specific number of times per week or day; on a specific date; at a specific time of day].*
 - *I will remind myself to use this strategy by _____.*
 - *I will track my use of this strategy by _____.*
 - *I will review my use of this strategy on the following date: _____.*
 - *Other considerations: _____.*
- **End** of Group Reflection.
 - How will you use this material in your classroom?
 - What do you think will be successful?
 - What will be some barriers?
 - What support do you need?



Meeting 2: *Optional* Small Group PLC Competency Check-In (30 minutes)

- **Begin** the session.
 - Review the group norms you created.
 - Consider using a group check-in or icebreaker activity.
- **Debrief**
 - Reflections or questions from first meeting focused on this competency.
 - Reflections or questions from implementation.
- **Define** session goals.
 - Discuss personal reflections and thoughts from the material you discussed previously.
 - Discuss personal development plans.
 - Check-in on strategy use.
 - Problem-solve challenges.
- **Explore** implementation.
 - Review personal development plans.
 - Use the discussion guides in the EdSERT Manager’s Course as support.
 - Share use of strategies.
 - Identify what’s been going well.
 - Identify areas for improvement.
 - Recommendations for adapting or modifying strategy use.
 - Problem solve implementation challenges.
- **Plan**
 - Select or update which strategies to use.
 - Plan continued use of strategies, such as:
 - *I will use or practice this strategy [a specific number of times per week or day; on a specific date; at a specific time of day].*
 - *I will remind myself to use this strategy by _____.*
 - *I will track my use of this strategy by _____.*
 - *I will review my use of this strategy on the following date: _____.*
 - *Other considerations: _____.*
- **End** of Group Reflection.
 - What has been a highlight from learning with EdSERT?
 - What has been the most useful for you?
 - What has been challenging?



Meeting 3: *Optional* Small Group PLC Competency Check-In (30 minutes)

- **Begin** the session.
 - Review the group norms you created.
 - Consider using a group check-in or icebreaker activity.
- **Debrief**
 - Reflections or questions from previous meetings.
 - Reflections or questions from implementation.
- **Define** session goals.
 - Discuss personal reflections and thoughts from the EdSERT competency.
 - Discuss personal development plans.
 - Check-in on strategy use.
 - Problem-solve challenges.
- **Explore** implementation.
 - Review personal development plans.
 - Use the discussion guides in the EdSERT Manager’s Course as support.
 - Share use of strategies.
 - Identify what’s been going well.
 - Identify areas for improvement.
 - Recommendations for adapting or modifying strategy use.
 - Problem solve implementation challenges.
- **Plan**
 - Select or update which strategies to use.
 - Plan continued use of strategies, such as:
 - *I will use or practice this strategy [a specific number of times per week or day; on a specific date; at a specific time of day].*
 - *I will remind myself to use this strategy by _____.*
 - *I will track my use of this strategy by _____.*
 - *I will review my use of this strategy on the following date: _____.*
 - *Other considerations: _____.*
- **End** of Group Reflection
 - What has been a highlight from learning with EdSERT?
 - What has been the most useful for you?
 - What has been challenging?



Meeting 4: *Optional* Small Group PLC Competency Check-In (30 minutes)

- **Begin** the session.
 - Review the group norms you created.
 - Consider using a group check-in or icebreaker activity.
- **Debrief**
 - Reflections or questions from previous meetings.
 - Reflections or questions from implementation.
- **Define** session goals.
 - Discuss personal reflections and thoughts from the EdSERT competency.
 - Discuss personal development plans.
 - Check-in on strategy use.
 - Problem-solve challenges.
- **Explore** implementation.
 - Review personal development plans.
 - Use the discussion guides in the EdSERT Manager’s Course as support.
 - Share use of strategies.
 - Identify what’s been going well.
 - Identify areas for improvement.
 - Recommendations for adapting or modifying strategies.
 - Problem solve implementation challenges.
- **Plan**
 - Select or update which strategies to use.
 - Plan continued use of strategies.
 - *I will use or practice this strategy [a specific number of times per week or day; on a specific date; at a specific time of day].*
 - *I will remind myself to use this strategy by _____.*
 - *I will track my use of this strategy by _____.*
 - *I will review my use of this strategy on the following date: _____.*
 - *Other considerations: _____.*
- **End** of Group Reflection.
 - What has been a highlight from learning with EdSERT?
 - What has been the most useful for you?
 - What has been challenging?

Continue to meet quarterly using the same structure or adapt it to best meet the needs of your educators or program.



Example Quarterly Implementation Schedule

Quarter 1, Month 1				
Monday	Tuesday	Wednesday	Thursday	Friday
Week 1 – Meeting 1: Introduction to EdSERT; develop small and large group PLCs				
Week 2				
Week 3 – Meeting 2: Optimistic Thinking module content				
Week 4				

Quarter 1, Month 2				
Monday	Tuesday	Wednesday	Thursday	Friday
Week 5 – Meeting 3: Optional small group meeting				
Week 6				
Week 7 – Meeting 4: Optional small group meeting				
Week 8				

Quarter 2, Month 1				
Monday	Tuesday	Wednesday	Thursday	Friday
Week 1 – Competency 2 module content				
Week 2				
Week 3 – Meeting 2: Optional small group meeting				
Week 4				

Quarter 2, Month 2				
Monday	Tuesday	Wednesday	Thursday	Friday
Week 5 – Meeting 3: Optional small group meeting				
Week 6				
Week 7 – Meeting 4: Optional small group meeting				
Week 8				



Competency Review: Eight Competencies Across One School Year

A different way for educators to participate in EdSERT using PLCs is during one school year, covering all eight competencies. If you're using this method, you might consider meeting monthly and using small-group PLC meetings for reflection, growth, and to build community with each other. When beginning a new competency, educators can complete their first self-assessment. They can complete a follow-up self-assessment for that competency to measure their growth when they feel ready to.

If you are unsure about the sequence for EdSERT, review the Approach and Sequence sections at the beginning of this document. Depending on the sequence that works best for you and your educators, adjust the following monthly implementation example. If you are meeting in-person, your educators will need to bring their devices to access the EdSERT material. If you have questions about accessing EdSERT through the Aperture System, review the System Setup section in this guide.

Outline for Implementing Eight Competencies Across One School Year

Month 1	Introduction to EdSERT
Month 2	Optimistic Thinking (Example); Small Group PLC Meeting
Month 3	Competency 2; Small Group PLC Meeting
Month 4	Competency 3; Small Group PLC Meeting
Month 5	Competency 4; Small Group PLC Meeting
Month 6	Competency 5; Small Group PLC Meeting
Month 7	Competency 6; Small Group PLC Meeting
Month 8	Competency 7; Small Group PLC Meeting
Month 9	Competency 8; Small Group PLC Meeting



Month 1

Note Use these suggested meeting structures to guide your EdSERT facilitation planning.

Meeting 1: Introduction to EdSERT (60 minutes)

- **Welcome & Introduction** to participation in EdSERT.
 - Based on your implementation outline and model, provide your educators with background information for how they'll participate in EdSERT.
- **Establish** groups norms with your educators and highlight the focus of building connections with colleagues.
 - Consider using your schoolwide norms if you have them or develop them as a group. These norms could focus on how your educators can be engaged, responsible, and respectful – focusing specifically on ways to foster their growth and connection with others.
- **Complete** the Introduction to EdSERT module.
 - Have your educators enroll in EdSERT through the Aperture System. For more information on this, refer to the System Setup section in this guide or contact your Aperture Success Team member.
 - After enrolling, have your educators complete the Introduction to EdSERT module individually.
- **Develop** goals with your educators for completing EdSERT.
 - Working with your educators, establish group and individual goals for their participation in EdSERT.
 - Consider recording these goals somewhere that you can refer to them during later meetings.
- **Review** and outline the competency order and meeting structure.
 - Each meeting organizes the material using the following method: Debrief, Define, Explore, Plan.
 - If this meeting outline doesn't work for you, consider updating it based on what works best in your school or program.
- **Establish** how educators will participate in EdSERT. This could be using in-person group methods, PLCs, individual or online participation, or a different method.



Month 2

Note Use these suggested meeting structures to guide your EdSERT facilitation planning.

Meeting 1: Competency 1 (Optimistic Thinking, for example; 60 minutes)

- **Begin** the session.
 - Review the group norms you created.
 - Consider using a group check-in or icebreaker activity.
- **Debrief**
 - Provide an opportunity for your educators to discuss reflections or questions from the previous session.
- **Define** goals for this competency.
 - Have your educators set individual goals for themselves for this competency.
 - Understand the competency content.
 - Complete the self-assessment.
 - Complete the personal development plan.
 - Plan their use of strategies.
 - Optional: as a group, establish group goals for this competency.
 - Meet a specific number of times during the next month as a small group or whole group.
 - Use a specific number of strategies for this competency.
- **Explore** competency content using EdSERT through the Aperture System.
 - As a large group or in your educator’s PLC groups, review the competency professional development material.
 - Use the Optimistic Thinking discussion guides in the EdSERT Manager’s Course as support.
 - Have your educators complete the Optimistic Thinking Self-Assessment.
 - Have your educators complete the Optimistic Thinking Personal Development Plan.
 - Identify areas of strength, emerging practices, and growth opportunities.
- **Plan**
 - After completing their self-assessment, have educators select Optimistic Thinking strategies to use.
 - Plan their use of the SEL strategies they choose, such as:
 - *I will use or practice this strategy [a specific number of times per week or day; on a specific date; at a specific time of day].*
 - *I will remind myself to use this strategy by _____.*
 - *I will track my use of this strategy by _____.*
 - *I will review my use of this strategy on the following date: _____.*
 - *Other considerations: _____.*
- **End** of Group Reflection.
 - How will you use this material in your classroom?
 - What do you think will be successful?
 - What will be some barriers?
 - What support do you need?



Meeting 2: *Optional* Small Group PLC Competency Check-In (30 minutes)

- **Begin** the session.
 - Review the group norms you created.
 - Consider using a group check-in or icebreaker activity.
- **Debrief**
 - Reflections or questions from previous meetings.
 - Reflections or questions from implementation.
- **Define** session goals.
 - Discuss personal reflections and thoughts from this competency.
 - Discuss personal development plans.
 - Check-in on strategy use.
 - Problem-solve challenges.
- **Explore** implementation.
 - Review personal development plans.
 - Use the discussion guides in the EdSERT Manager’s Course as support.
 - Share use of strategies.
 - Identify what’s been going well.
 - Identify areas for improvement.
 - Recommendations for adapting or modifying strategy use.
 - Problem solve implementation challenges.
- **Plan**
 - Select or update which Optimistic Thinking strategies to use.
 - Plan continued use of strategies, such as:
 - *I will use or practice this strategy [a specific number of times per week or day; on a specific date; at a specific time of day].*
 - *I will remind myself to use this strategy by _____.*
 - *I will track my use of this strategy by _____.*
 - *I will review my use of this strategy on the following date: _____.*
 - *Other considerations: _____.*
- **End** of Group Reflection.
 - What has been a highlight from learning with EdSERT?
 - What has been the most useful or helpful for you?
 - What has been challenging?



Month 3

Note Use these suggested meeting structures to guide your EdSERT facilitation planning.

Meeting 1: Competency 2 (Based on Need; 60 minutes)

- **Begin** the session.
 - Review the group norms you created.
 - Consider using a group check-in or icebreaker activity.
- **Debrief**
 - Reflections or questions from learning with EdSERT.
- **Define** goals for this session.
 - Have your educator’s set individual goals for themselves for this competency.
 - Understand the competency content.
 - Complete the self-assessment.
 - Complete the personal development plan.
 - Plan their use of strategies.
 - Optional: as a group, establish group goals for this competency.
 - Meet a specific number of times during the next month as a small group or whole group.
 - Use a specific number of strategies from this competency.
- **Explore** competency content using EdSERT through the Aperture System.
 - As a large group or in your educator’s PLC groups, review the competency professional development material.
 - Use the discussion guides in the EdSERT Manager’s Course as support.
 - Have your educators complete the self-assessment.
 - Have your educators complete their personal development plan.
 - Identify areas of strength, emerging practices, and growth opportunities.
- **Plan**
 - After completing their self-assessment, have educators select which SEL strategies to use.
 - Plan their use of each of their SEL strategies, such as:
 - *I will use or practice this strategy [a specific number of times per week or day; on a specific date; at a specific time of day].*
 - *I will remind myself to use this strategy by _____.*
 - *I will track my use of this strategy by _____.*
 - *I will review my use of this strategy on the following date: _____.*
 - *Other considerations: _____.*
- **End** of Group Reflection.
 - How will you use this material in your classroom?
 - What do you think will be successful?
 - What will be some barriers?
 - What support do you need?



Meeting 2: *Optional* Small Group PLC Competency Check-In (30 minutes)

- **Begin** the session.
 - Review the group norms you created.
 - Consider using a group check-in or icebreaker activity.
- **Debrief**
 - Reflections or questions from first meeting focused on this competency.
 - Reflections or questions from implementation.
- **Define** session goals.
 - Discuss personal reflections and thoughts from the material you discussed previously.
 - Discuss personal development plans.
 - Check-in on strategy use.
 - Problem solve challenges.
- **Explore** implementation.
 - Review personal development plans.
 - Use the discussion guides in the EdSERT Manager’s Course as support.
 - Share use of strategies.
 - Identify what’s been going well.
 - Identify areas for improvement.
 - Recommendations for adapting or modifying strategy use.
 - Problem solve implementation challenges.
- **Plan**
 - Select or update which strategies to use.
 - Plan continued use of strategies, such as:
 - *I will use or practice this strategy [a specific number of times per week or day; on a specific date; at a specific time of day].*
 - *I will remind myself to use this strategy by _____.*
 - *I will track my use of this strategy by _____.*
 - *I will review my use of this strategy on the following date: _____.*
 - *Other considerations: _____.*
- **End** of Group Reflection.
 - What has been a highlight from learning with EdSERT?
 - What has been the most useful for you?
 - What has been challenging?

Continue to meet quarterly using the same structure or adapt it to best meet the needs of your educators or program.



Example Monthly Implementation Schedule

Month 1				
Monday	Tuesday	Wednesday	Thursday	Friday
Week 1 – Meeting 1: Introduction to EdSERT; develop working groups				
Week 2				
Week 3				
Week 4				

Month 2				
Monday	Tuesday	Wednesday	Thursday	Friday
Week 1 – Meeting 1: Optimistic Thinking module content				
Week 2				
Week 3 – Meeting 2: Optional small group discussion				
Week 4				

Month 3				
Monday	Tuesday	Wednesday	Thursday	Friday
Week 1 – Meeting 1: Competency 2 module content				
Week 2				
Week 3 – Meeting 2: Optional small group discussion				
Week 4				

EdSERT Completion Report

The [EdSERT Completion Report](#) displays your EdSERT completion percentage and status by individual educator. You can filter the completion results by specific modules to track participation. Follow the steps below to access and run the report.

To generate the EdSERT Completion Report:

1. Select **Data & Insights**, then select **EdSERT Completion**.
2. Choose the specific module you'd like to view in the **Modules** drop-down menu.
3. View the Percent Started and Percent Completed numbers for quick reference.
4. To view full completion details in a .csv file, click the **Export** button. This document will display all participating educators at your school and their completion status.

Summary

We are excited for you to have the background knowledge and support to get the most out of EdSERT!

Ensure that:

1. You have a facilitator.
2. You have determined your implementation model and plan to support your educators' growth and development.
3. You have outlined the sequence of competencies to cover.
4. You and your educators have access to EdSERT through the Aperture System.

Most importantly, ensure that your educators have the time, space, and privacy to engage in honest self-reflection. Provide opportunities for them to connect with their colleagues and grow their social and emotional skills and knowledge. Last, be sure to regularly gather and review data and feedback from your educators. This can help you understand your educators' experience with EdSERT and highlight areas of strength and improvement.

We hope you have fun working with EdSERT and that you and your educators find it to be useful! If you have questions about EdSERT or accessing the materials in the Aperture System, email the Aperture Support Team at Support@ApertureEd.com.

Appendix A: EdSERT Implementation

Quick Guide to Implementation and Planning

1 APPROACH

What are the needs of your program?

- 2-4 competencies per year across two school years
- All 8 competencies in one school year

What would be most beneficial for your staff?

2 SEQUENCE

What order will work best for your staff and program?

- Based on your DESSA data
- The order recommended by EdSERT
- An order determined by other student or staff needs
- An order determined by an existing SEL program

3 IMPLEMENTATION

What implementation method works best for your staff and program?

- Dedicated time for EdSERT implementation and community building
- PLC or small group meetings
- Meet every 4 or 8 weeks

4 PRIVACY

Assure educators that they will never be asked to share self-assessments or private reflections due to the sensitive nature of SEL topics

- Educators' self-assessments are private and confidential
- Encourage educators to use results to improve practices and build connection with others

5 ACCOUNTABILITY

How can you monitor progress despite the self-directed nature of EdSERT?

- Anonymous feedback
- EdSERT feedback survey
- Voluntary discussions at monthly PD meetings
- Other survey methods



Appendix B: Satisfaction Survey

Note Consider using this satisfaction survey with your educators by using an online survey such as this, <https://bit.ly/3mZkey4>, or it can be disseminated using paper copies.

Directions: Read each statement and select your level of agreement.

1. I found the EdSERT material to be useful and applicable in my role.

	1	2	3	4	5	
Strongly disagree	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Strongly Agree

2. I have a better understanding of the social and emotional competencies we reviewed.

	1	2	3	4	5	
Strongly disagree	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Strongly Agree

3. I feel more confident supporting my students to develop their social and emotional competencies.

	1	2	3	4	5	
Strongly disagree	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Strongly Agree

4. I have more strategies in my role to support social and emotional competence development.

	1	2	3	4	5	
Strongly disagree	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Strongly Agree

5. EdSERT has been a good use of my time.

	1	2	3	4	5	
Strongly disagree	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Strongly Agree

6. I feel a greater sense of community with my colleagues after completing EdSERT.

	1	2	3	4	5	
Strongly disagree	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Strongly Agree

7. EdSERT has improved my well-being as an educator.

	1	2	3	4	5	
Strongly disagree	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Strongly Agree

Additional thoughts, feedback, or suggestions:

Appendix C: EdSERT Communication

Hello <SCHOOL/PROGRAM NAME> Educators!

One of our most important goals at <SCHOOL/PROGRAM NAME> is making sure that our students have the social and emotional skills to be successful in the classroom, community, and after they graduate. These skills include things like cooperating with others, being responsible, and focusing on tasks. Supporting the social and emotional knowledge, skill sets, and well-being of our educators and staff is equally vital. We're writing to tell you about our participation in EdSERT, a social and emotional learning (SEL) professional development program.

We will be implementing EdSERT from Aperture Education, which provides schools with professional development tools, self-reflective assessments, personal development plans, self-directed strategies, and teaching practices. Through our participation in the EdSERT program, we will ensure that our educators receive a strong foundation in SEL and will learn new practices across all competency domains to support their own and their students' SEL development.

I hope that for these reasons, you are just as excited as I am to be a part of this journey. As a participating educator, you are expected to complete the following self-paced professional development trainings and activities throughout this school year:

- The Introduction to EdSERT module
- Each assigned competency modules
- As part of each competency modules, you will:
 - Review the content and complete the activities.
 - Complete the self-reflective assessment.
 - Complete the personal development plan.
 - Choose and implement strategies.
 - Complete a brief self-reflection survey at the end of each competency cycle.

You will be thoroughly trained and supported on how to complete the assigned modules in the Aperture System this school year. If you don't currently have access to the Aperture System, you will receive an email invitation soon.

I am so excited for us to launch this program, as I know it will empower you to support students in a strength-focused manner and increase your own competence and confidence in the domain of social and emotional learning.

Sincerely,

<EdSERT Facilitator>

References

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Aperture Education empowers over 8,000 unique schools, over 156,000 educators and more than 2 million students across North America to measure, strengthen, and support social and emotional competence. The powerful data districts receive enables education leaders to take strategic action about SEL within their organizations. The Aperture System includes the DESSA suite of strength-based assessments, which is lauded by researchers for its high standards of reliability and validity. Educators also appreciate its ability to easily and quickly identify each student's personal social and emotional strengths and areas of needed support. Aperture partners with industry curriculum leaders to deliver research-based, CASEL™-informed intervention strategies to bolster specific areas of needed growth. With robust reporting in one easy-to-use system, Aperture is favored in districts nationwide. To learn more, visit www.ApertureEd.com.