CHASE EXCELLENCE

The Cue-to-Action Framework

Research Foundations, Logic Model, and Evaluation Plan for the Chase Excellence Professional Learning Book Study

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Research Foundations and Evaluation Plan · 2026

ESSA Tier 4 · Demonstrates a Rationale

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SECTION 1

Purpose and Summary

This paper documents the research foundations, theory of change, and evaluation plan for the Chase Excellence Professional Learning Book Study. It is written for school and district leaders, federal programs administrators, and evaluation offices who must determine whether a proposed professional-learning activity is supported by a defensible rationale.

The paper makes a bounded claim. Each component mechanism in the Cue-to-Action Framework is supported by experimental or meta-analytic evidence drawn from cognitive and organizational research. The integrated sequence proposed here has not itself been tested, and is presented as a theory of action with a stated plan to examine its effects.

Under the Every Student Succeeds Act, this corresponds to Tier 4, Demonstrates a Rationale: a well-specified logic model informed by research, with an intended outcome aligned to a stakeholder need and a plan to evaluate effects. Readers should note that Tier 4 evidence is acceptable for programs under Titles I through IV generally, but is not sufficient for interventions funded under Title I, Section 1003 school improvement, which requires Tier 1, 2, or 3.

SECTION 2

The Retrieval-to-Action Gap

Professional learning in schools has a retrieval problem rather than a knowledge problem. Educators generally know what good practice looks like. The difficulty is that knowledge acquired in a workshop is frequently unavailable at the moment a decision is actually made: in a hallway conversation, a parent meeting, a discipline referral, or a staffing decision made under time pressure.

The gap is not between what educators know and what they believe. It is between what they know and what they retrieve. A principle that cannot be recalled at the point of decision cannot influence behavior, regardless of how well it was understood when it was taught.

This paper refers to that gap as the Retrieval-to-Action Gap. The Cue-to-Action Framework is a proposed approach to closing it by attaching durable principles to short, memorable verbal cues that are more likely to return under cognitive load.

SECTION 3

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Description of the Intervention

The intervention is a facilitated professional-learning book study built on Chase Excellence: Ordinary Sayings That Lead to Extraordinary Actions. It is designed as a sustained, collaborative, job-embedded experience rather than a stand-alone workshop or a distribution of books.

The study is organized around the book's three Movements rather than fifteen individual chapter meetings. Participants read across a Movement, identify the cues that resonate, examine the principle attached to each, and convert that principle into a documented commitment to act.

The structure below uses the features that the Every Student Succeeds Act's definition of professional development requires: sustained, collaborative, job-embedded, and data-driven rather than a stand-alone workshop. Those same features are commonly described in the professional-learning literature as characteristics of effective professional development, though that consensus has been challenged on methodological grounds (Sims & Fletcher-Wood, 2021). They are presented here as design choices consistent with statutory requirements, not as evidence of effectiveness.

Structure and dosage

Structure	Eight sessions total: a six-session core, plus two optional bookend sessions for opening and closing the experience.
Schedule — 9 weeks	One marking period. Six core sessions held every one to two weeks, with job-embedded application between sessions.
Schedule — 18 weeks	One semester. Eight sessions including both bookends, held every two to three weeks, allowing longer application intervals between sessions.
Movement I — Know Yourself	Two sessions. Progress and identity, relationships, resilience, self-awareness, and growth through adversity.
Movement II — Build Something	Two sessions. Collaboration, preparation, communication, conflict, planning, and everyday leadership.
Movement III — Build Beyond Yourself	Two sessions. Developing people, preparing for what comes next, and building capacity that outlasts the leader.
Session design	Each Movement receives one session for meaning and reflection and one for cues, application, and action.
Between sessions	Job-embedded application, reflection on local data, and recorded implementation commitments.

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Facilitation	A facilitation guide with discussion prompts, protocols, reflection tools, and challenges is provided at no cost.

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SECTION 4

Logic Model

The logic model below states one intended outcome, aligned to the educator-effectiveness need addressed by Title II, Part A. Outcomes beyond educator practice are shown as a hypothesized long-term aim and are explicitly outside what this intervention measures.

Inputs	Text; eight-session facilitation guide; prepared facilitator; protected collaborative time across one marking period (9 weeks) or one semester (18 weeks); cue delivered between sessions.
Activities	Six core sessions across three Movements; job-embedded application between sessions; reflection on local data; recorded implementation commitments; follow-up sessions.
Outputs	Number of educators completing the series; number of cues in documented use; number of implementation commitments recorded; number of follow-up sessions held.
Short-term outcome — Movement I	Participating educators can name their own decision patterns and growth edges, and identify the cue that applies to them.
Short-term outcome — Movement II	Participating educators distribute responsibility rather than absorbing it, and prepare before reacting.
Short-term outcome — Movement III	Participating educators develop the capacity of others rather than solving problems on their behalf.
Intended outcome	Participating educators demonstrate increased reflective professional practice, evidenced by pre/post self-assessment of decision-making behavior, documented implementation commitments, and follow-through on those commitments at 90 and 180 days after the final session.
Long-term aim (hypothesized; not measured by this intervention)	Strengthened instructional leadership and improved student outcomes. The causal link between educator reflective practice and student outcomes is theorized here, not demonstrated, and lies outside what this intervention measures.

Figure 1, on the following page, shows the cognitive model underlying the intervention: the ten stages by which a short verbal cue is encoded, retrieved, and

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converted into action, together with the proposed measurement pathway and the research grounding each stage draws on. It is the mechanism-level companion to the logic model above.

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Figure 1. The Cue-to-Action Framework (Eley, 2026).

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SECTION 5

Research Foundations by Stage

Each stage of the framework is mapped below to the mechanism it draws on and the research supporting that mechanism. The evidence cited supports the individual mechanisms. It does not establish the integrated sequence, which is addressed in Section 6.

Stage	Mechanism	Supporting research
1. Experience / Story	Narrative and schema organization	Structured stories organize information into schemata that guide encoding and later recall (Mandler & Johnson, 1977).
2. Meaning / Principle	Principle abstraction and analogical transfer	Learners can abstract a general schema from concrete stories and apply it analogically (Gick & Holyoak, 1983).
3. Mental Magnet	Encoding specificity	Later retrieval depends in part on the relationship between what was encoded and the cues available at retrieval (Tulving & Thomson, 1973).
4. Encoding / Rehearsal	Retrieval practice	Actively retrieving learned material improves delayed retention and, under some conditions, transfer (Roediger & Karpicke, 2006; Butler, 2010; Karpicke & Blunt, 2011).
5. Situational Cue	Prospective memory	Future situations can trigger intended information or actions through strategic monitoring or spontaneous retrieval (McDaniel & Einstein, 2000; McDaniel et al., 2015).
6. Recall of Cue	Prospective memory	See stage 5. Cue-triggered retrieval is the mechanism by which the saying becomes available at the decision point.
7. Recall of Principle	Encoding specificity	See stage 3. The cue functions as a retrieval route to the principle encoded alongside it.
8. Pause + Reflection	Metacognition and self-regulation	Monitoring is distinguishable from control in metacognition (Nelson & Narens, 1990); self-regulation is cyclical and includes self-reflection (Zimmerman, 2000); metacognitive prompts show positive meta-analytic effects on self-regulated learning (Guo, 2022).
9. Decision /	Implementation	Linking a future cue to an intended response

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Stage	Mechanism	Supporting research
Action	intentions	increases cue accessibility and goal-directed action, with meta-analytic support (Gollwitzer, 1999; Gollwitzer & Sheeran, 2006).
10. Reinforcement / Revision	Retrieval practice and transfer	See stage 4; transfer research documents the conditions under which trained behavior is maintained and generalized (Baldwin & Ford, 1988; Barnett & Ceci, 2002; Blume et al., 2010).

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SECTION 6

What Is Established and What Is Proposed

Credibility in a rationale-stage document depends on stating the boundary between supported mechanisms and untested propositions. That boundary is stated here explicitly.

Supported by prior research

- Structured narrative supports encoding and later recall.
- General principles can be abstracted from concrete stories and applied to new situations.
- Retrieval depends in part on the match between encoding conditions and the cues available later.
- Retrieval practice improves delayed retention and supports transfer under specified conditions.
- Environmental cues can trigger previously formed intentions.
- Metacognitive prompting improves self-regulated learning, with meta-analytic support.
- Linking a cue to a planned response increases the likelihood of goal-directed action, with meta-analytic support.
- Transfer of trained behavior depends on learner, design, and environmental conditions.

Proposed and awaiting empirical test

- That the ten stages operate as an integrated sequence in the order described.
- That a saying drawn from professional or personal narrative functions as an effective retrieval cue in workplace decision contexts specifically.
- That the four-part measurement pathway (Recall, Principle Retrieval, Transfer, Behavioral Application) is a valid serial progression.
- That the twelve self-assessment items measure the four constructs they were written to measure.
- That participation in the book study produces the short-term outcomes named in the logic model.
- That increased reflective professional practice contributes to improved instructional leadership and student outcomes.

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Attribution

The Cue-to-Action Framework is a proposed integrative conceptual model developed by Dr. Deangello Eley (2026). Existing theories and findings ground its component mechanisms; they do not establish the full sequence. The framework should be cited as Eley (2026), while its individual theoretical antecedents are cited separately.

SECTION 7

Measurement and Evaluation Plan

Measurement pathway

The framework proposes a four-stage measurement pathway. Each stage corresponds to an item in the Reflective Practice Self-Assessment, a twelve-item instrument with four open-response items that accompanies this paper. Administration procedures, scoring rubrics, and transfer scenarios are provided in the companion Facilitator Scoring Guide.

The self-assessment additionally measures the three Movement-level short-term outcomes named in the logic model, using three items per construct on a four-point frequency scale. Every item was written to a specific construct in the logic model, which provides a documented content rationale. That is not the same as evidence of content validity, which requires independent expert review of item relevance and coverage and has not yet been conducted. Internal consistency, item performance, construct validity, and sensitivity to change all require data and are likewise not established. The Facilitator Scoring Guide states which analyses to run, at what thresholds, and in what order.

Stage	Question	Instrument
Recall	Can the participant reproduce the saying without prompting?	Unprompted free-recall item, administered at baseline, end of series, and 90 and 180 days after the final session.
Principle Retrieval	Can the participant explain the principle the saying carries?	Short constructed response, scored against a rubric for principle accuracy.
Transfer	Can the participant recognize a novel situation in which the principle applies?	Scenario-based item using situations not used during the series.
Behavioral	Did the principle influence	Self-reported account of a specific

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Stage	Question	Instrument
Application	a decision the participant actually made?	past action with its counterfactual stated. This is a proxy for behavior, not direct observation. An implementation commitment on its own measures intention rather than action.

Evaluation design

The proposed evaluation is a single-group pre/post design with delayed follow-up at 90 and 180 days after the final session. It is appropriate to the current evidence stage and establishes whether the named outcomes occur, providing the descriptive baseline required before any comparative study.

Results from this design must be reported as change over time and never as intervention effects. A single-group design cannot separate the intervention from history, maturation, repeated testing, or instrumentation, and designs of this type tend to produce larger apparent effects than comparison-group designs. This constraint is stated here, at the front of the evaluation plan, rather than only among the limitations below.

Repeated administration can itself raise later scores. The transfer scenarios rotate across administrations for that reason. The twelve self-assessment items are identical at every time point, which is a known source of test-retest contamination; any report of results should say so, and sites administering the instrument more than twice should vary the open-response prompts.

Data sources: a participant self-assessment administered at four time points; the four-stage measurement instrument described above; implementation commitment artifacts generated during the series; facilitator implementation logs recording dosage and fidelity; and, where a site elects to collect it, supervisor corroboration of follow-through.

Analysis: descriptive statistics and within-participant change across time points, reported with participation and attrition rates. Fidelity data will be reported alongside outcomes so that results can be interpreted against actual dosage received.

Timing note: follow-up intervals are measured from the final session, not from baseline. For a 9-week cohort, both follow-up points fall within the same school year. For an 18-week cohort beginning in the fall, the 180-day point falls in the following school year. That interval provides a stronger test of durability across a summer, but requires the site to plan for participant tracking beyond the year of implementation.

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Limitations to be stated in any report of results: the absence of a comparison group means observed change cannot be attributed to the intervention; self-report measures are subject to social desirability; and participating sites are self-selected. These limitations are inherent to the current evidence stage and define the path to a Tier 3 design.

Path to stronger evidence: sites implementing at different start dates permit a matched-comparison design with statistical controls for selection bias, which is the requirement for ESSA Tier 3. Districts interested in contributing to that work are invited to contact the author. Any data collection conducted for research purposes will follow the participating district's research review procedures and, where publication is intended, institutional review board approval.

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SECTION 8

ESSA Evidence Alignment

ESSA defines four evidence tiers. Tier 1 requires a well-implemented randomized controlled trial; Tier 2 a quasi-experimental design or a randomized trial with high attrition; Tier 3 a correlational design with statistical controls for selection bias; and Tier 4 a well-specified logic model with one intended outcome aligned to a stakeholder need, supported by existing research, together with an effort to examine effects.

This intervention is presented at Tier 4. It is not represented as Tier 1, 2, or 3, and no claim of demonstrated effectiveness is made.

Purchasers should note that Tier 4 evidence is acceptable for programs under Titles I through IV generally, but interventions funded under Title I, Section 1003 school improvement are required to meet Tier 1, 2, or 3. This intervention does not currently meet that standard.

The tier definitions and funding restrictions summarized above are a plain-language summary and not a legal citation. Readers should confirm them against the current statutory text of the Every Student Succeeds Act and current U.S. Department of Education non-regulatory guidance before relying on them in a funding decision.

Allowability of any particular purchase depends on the district's needs assessment, approved federal programs plan, intended use, participants, state guidance, and local purchasing procedures. Nothing in this paper constitutes legal, fiscal, or grant-management advice. Purchasers should obtain approval from their federal programs administrator or business office before obligating funds.

APPENDIX A

Companion Instruments

The following instruments accompany this paper and operationalize the measurement plan described in Section 7.

Reflective Practice Self-Assessment — Participant Form	Twelve four-point frequency items covering the three Movement-level outcomes and reflective practice, plus four open-response items covering recall, principle retrieval, transfer, and behavioral application. Approximately eight minutes.
Facilitator Scoring Guide	Administration procedures, participant-code method,

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Part A scoring and data-quality checks, 0–3 rubrics for the three open-response items, three transfer scenarios, and a statement of what the instrument does and does not establish. Not for distribution to participants.

SECTION 9

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