

Appendix: Planning Worksheets

Determining a Strategy Focus: Worksheet

Use this worksheet to help you determine which components or elements of a strategy your school is ready to implement in the next two years. Use the Strategy Guide (or your own research) and an audit of your school's current state to complete this worksheet.

1

Clear Description of Strategy:

Strategy Core Components or Elements. (If using a CDE Strategy Guide, you can copy or short-hand directly from there.)

2

Current State: What systems/structures or practices are already in place that can support this strategy?

Gap Analysis: Compare “Core Components” and “Current State.” Where will system/structures and practices need to be created or added?

3

Priorities: Which elements from your gap analysis, above, will you prioritize for development in the current plan? Which will be prioritized in future plans?

Implementation Planning: Worksheet

Use the priorities identified in your completed “Determine a Strategy Focus” worksheet to answer the following questions regarding the WHO, HOW, and WHEN details of your implementation plan.

1

WHO should be involved?

List Practitioners here:

List staff providing support for practitioners (leaders, admin) here:

List Implementation Team Members here:

2

HOW will you make changes?

*What will **PD** focus on?*

*How will **coaching** and/or PLCs be used to reinforce PD?*

*What changes are needed to **structures, systems, and routines**?*

*What **tools and resources** will need to be created, acquired, or assigned?*

3

WHEN will things be done?

What needs to be in place prior to Year 1?

What foundations will be laid during Year 1?

How will the strategy be developed in Year 2?



Progress Monitoring: Worksheet

Use the WHO, HOW, and WHEN responses from in your “Implementation Planning” worksheet to help you determine how you will monitor the implementation and impact of your strategy in the spaces below.

DATA COLLECTION

IMPLEMENTATION BENCHMARKS: How will you know that your strategy is being implemented as planned throughout the year?

Measure & Method of collection (e.g., class observation, lesson plan or student work audit, etc.)	Actor/Owner	Target or aim	Date

INTERIM MEASURES: How will you know if your strategy is impacting student outcomes as planned?

Assessment (e.g., curriculum-based assessment, NWEA MAP, iReady, DIBELS)	Student Group	Target or aim	Date

MONITOR AND IMPROVE

DATA ANALYSIS & REFLECTION – When will you analyze and reflect on benchmark and interim measure data?

Meeting Focus	Attendees	Date



Change Management: Worksheet

Use the questions and prompts below to build out a change management plan for your strategy implementation. After you’ve created your implementation plan, use this worksheet to add in key change management activities or tasks (e.g., staff meetings, stakeholder input sessions, family information nights, etc.).



Challenge and Strategy

Clear Statement of Problem to be solved (prioritized challenge)

Concise description of the strategy (and how it will address that challenge)



Stakeholder Engagement

Who should give input?

Who should have veto-power?

Who should be involved in decision-making?



Communications Planning

Team member or Stakeholder group	What do they need to know?	Method? (e.g., Email, staff meeting, 1:1?)	When do they need this information?

Planning Template for Annual Plan

ACTION PLANNING for YEAR 1

BOY (before teachers return) – <i>Adjust supporting systems & structures</i>	Owner	Date
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

School Year Launch: BOY Trainings & Prep (before students return)	Owner	Date
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

Weeks 6-8 – <i>Install foundational practices; coaching to reinforce training</i>	Owner	Date
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

By Mid-Year – <i>Reinforce and refine foundational practices</i>	Owner	Date
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

By EOY – <i>Increase strategy adoption/use; monitor progress and impact.</i>	Owner	Date
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

Planning Template for Short Cycle Plan

ACTION PLANNING for 90-DAY SHORT CYCLE

Before Cycle – <i>Adjust supporting systems & structures</i>	Owner	Date
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

Cycle Launch: Trainings & Prep (before students start term)	Owner	Date
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

Weeks 4-6 – <i>Implement “bite-size” next step; coaching to reinforce steps</i>	Owner	Date
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

Through End of Cycle – <i>Reinforce practices; monitor progress and impact.</i>	Owner	Date
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

Prepare for Next Cycle – <i>Reflect on progress, determine next steps, plan.</i>	Owner	Date
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		