**Reviewing and Revising the Draft Action Plan**

Improving the Action Plan with Feedback from Colleagues;

Building a Shared Understanding of the Work Ahead

**Why This Step is Important:** As noted in the *Planning for Success* guide, “Creating the Action Plan,” action planning is an iterative process. It is helpful to action plan teams, as they draft process and early evidence of change benchmarks, to share their work with colleagues and benefit from others’ perspectives and feedback. The *Planning for Success* Action Plan Review Protocol, below, provides a structured process action plan teams can use to review plan drafts and gather such feedback from colleagues. With this protocol, colleagues act as external reviewers for one another, asking questions and offering observations that increase clarity and deepen the action planning process. The action plan review process helps to raise issues not yet considered by each initiative’s action plan team and to develop the larger team’s understanding of the work proposed for the school or district as a whole.

**The *Planning for Success* Action Plan Review Process:** It is helpful to conduct a full or modified action plan review at least twice during action plan development. Conducting a preliminary, modified review early on in the action planning process can provide action plan teams with feedback that can transform their approach in drafting the action plan. For example, reviewers can help action plan teams determine whether process benchmarks, as written, are specific enough to help guide and monitor the work, whether timeframes are realistic, and so on. Or reviewers can raise questions about the involvement of other stakeholders in the initiative’s work. Action plan teams can then use this guidance as they continue creating the first draft of their plan.

Once drafts for all strategic initiatives are completed, a full action plan review will support refinement of the action plans and allow the larger team to review and vet the scope of work represented by the combined action plans. This opportunity helps to ensure that the school or district action plan as a whole is realistic and achievable. The process below describes the action plan review.

1. Organize into strategic initiative action plan teams, with online or printed copies of the action plan draft. Identify team members who will remain with the action plan (such as the facilitator and recorder) and those who will serve as reviewers for other teams.
2. Reorganize for the PfS Action Plan Review Protocol, with team members identified as reviewers dispersing equally across action plan teams. Conduct the PfS Action Plan Review Protocol.
3. If time and interest permit, reorganize once again and conduct the PfS Action Plan Review Protocol a second time.
4. Reconvene action plan teams. Team members who remained with the action plan share feedback; the team modifies the action plan draft as appropriate.
5. Reconvene as a whole group. Debrief the protocol experience. Ask action plan team facilitators to share plan revisions.

**Time Required**: A modified action plan review of a draft in process can be conducted in approximately 20 to 40 minutes. Use of the PfS Action Plan Review Protocol for completed plan drafts requires approximately 45 minutes to 1 hour, depending on the quality of the plan drafts.

**Text for Facilitator Presentation Slides:** Some suggested text for presentation slides for the PfS Action Plan Review Protocol is included below.

**Slide 1: Action Plan Review Protocol**

* Organize into action plan teams
* Facilitator and recorder remain with action plan
* Other members join action plan teams as reviewers
	+ Example: Team 1 reviewers join Team 2 and Team 3
* Conduct protocol, documenting feedback
* Reviewers switch teams; conduct protocol
* Action plan teams reconvene to review feedback and revise plans

**Slide 2: Action Plan Review Debrief**

* What was your experience of this protocol?
* What types of revisions did your team make based on reviewers’ questions and feedback?
* In what ways did this process improve your action plan?

***Planning for Success* Action Plan Review Protocol**

*Purpose:* This protocol can be used to tune and revise draft action plans and their benchmarks. Members of individual action plan teams have the opportunity to present their action plan drafts to colleagues for review and feedback. As reviewers, these colleagues provide a valuable perspective while building their own knowledge about the action plan under development.

*Process:* Presenters share the written action plan, online or in hardcopy, with reviewers. After reviewers have had an opportunity to read and reflect on the action plan, presenters ask reviewers the protocol questions below. Reviewers provide feedback in as much detail as possible. Presenters listen, ask clarifying questions, and record feedback.

**Questions**

*Do you think the Action Plan...*

* Reflects a level of planning that is deep enough to support effective implementation of this initiative?
* Monitors and measures items that are important?
* Will be easily understood by staff and the community?

*Do you think the action plan’s process benchmarks…*

* Are clear and describe in adequate detail the specific actions that will be taken?
* Identify realistic and achievable timeframes for the work?
* Support effective monitoring, naming a person responsible and a date?

*As you review the early evidence of change benchmarks, can you…*

* Name the evidence/data source that will be used to evaluate that benchmark?
* Explain how you will see that evidence—who will collect it, how, and when?