

Reviewing the Draft Action Plan for Quality

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 the action plan teams and to develop the larger team’s understanding of the work proposed for the district as a whole.

The 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. Action plan teams can then use this guidance as they continue creating the first draft of their plan.

A full action plan review once drafts are completed will support refinement of the action plans and allow the large team to review and vet the scope of work represented by the combined plans. This opportunity helps to ensure that the district action plan is realistic and achievable. The process below describes the action plan review.

1. Organize into individual action plan teams, preferably with 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 Action Plan Review Protocol, with team members identified as reviewers dispersing equally across action plan teams. Conduct the Action Plan Review Protocol.
3. If time and interest permit, reorganize once again and conduct the 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 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 Action Plan Review Protocol is included below.

Slide 1: Action Plan Review Protocol

- Organize into action plan teams
- Team leader 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?

Action Plan Review Protocol

Purpose: This protocol can be used to tune and revise draft action plans and their benchmarks. Members of individual action planning 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 *for silent text review*. Presenters should not introduce the plan and its benchmarks or provide context, rather allowing the plan to stand on its own. 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 and/or modify the action plan, as appropriate.

Questions

Do you think the Action Plan...

- Monitors and measures items that are important?
- Will be easily understood by staff and the community?

Do you think the action plan's benchmarks...

- Are clear and specific?
- Identify realistic and achievable timeframes?
- Support effective monitoring, for example, naming an individual owner and a specific timeframe?

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?
- State how the benchmark is aligned with plan outcomes?