**Designing the Planning Process and Planning Team**

Determining Planning Process Structure and Team Membership

**Why This Step is Important:** *Planning for Success* is designed to be flexible and customizable to meet the unique needs of each district or school. There are many ways communities might choose to structure their planning process and leaders will want to make this strategic decision based on the school or district current context. Superintendents and principals may ask themselves: In addition to building an effective plan with community buy-in, what else would we like to accomplish through this process? Would we benefit from changes in culture? Is this an opportunity to build community engagement in and advocacy for our schools? The PfS process offers an excellent opportunity for a “two-fer” – a plan plus another desired change – and can be designed with such additional district goals in mind.

The structure of the planning process will determine the composition of the team that conducts the planning and how that team interacts with the district or school leadership team (if they are not one and the same). There are as many ways to structure the planning process and the planning team as there are districts and schools. *Planning for Success* case studies illustrate a variety of ways to structure the work and can serve as a useful resource in the design of the planning process, as leaders consider the level of engagement of both internal and external stakeholders. As districts and schools design a structure that best fits their current context, it is helpful to consider how the planning process will be inclusive, engaging stakeholders across the community, and how it will directly connect to the work of the leadership team.

**Engaging the Community in Meaningful Ways:** There are many benefits from taking an inclusive approach to the planning process. Diverse perspectives will strengthen the quality and effectiveness of the resulting plan, and inviting participation in the planning process will build ownership and advocacy for the resulting plan among both educators and the community. An inclusive approach will contribute to a positive culture, helping to build a shared understanding of the work required to serve all students as well as the relationships and trust among stakeholders that will support that work. Some *Planning for Success* pilot districts took such an inclusive approach, creating diverse planning teams of approximately 25 to 30 members that included district and school administrators, teachers, families, students, community partners, and school committee members. For schools, the School Council may serve as the planning team.

If districts prefer another planning team structure, they will want to design a process that provides other opportunities for the community to actively participate in the plan’s development. For example, most *Planning for Success* pilot districts engaged the community in envisioning the future and in the work of prioritizing strategic initiatives for implementation.

**Connecting to the Leadership Team:**Some districts and schools may choose to conduct a planning process that is launched by the leadership team and then expands across the community. For example, in some *Planning for Success* pilot districts, the leadership team served as the initial planning team and, as the process continued, a larger administrative team or inclusive community team began to serve as the primary planning team. Regardless of planning team structure, it is important to maintain the connection between the leadership team and the planning process. The perspective and feedback of the leadership team is especially beneficial during root cause analysis and the setting of strategic initiatives and outcomes.

**Identifying Planning Team Members:** Once the process and timeline have been set, leaders will want to identify and invite individuals to participate in the planning team. The way in which leaders identify team members is critical to both the quality of the process and community perceptions about its credibility. For example, to build a plan with community buy-in, it is important that the process is structured so that the voices of those less often heard from in the district are included as well as the voices of those more often heard from, and that voices are heard across grade spans. It is also important that the team not be, or appear to be, a group of “favorites” handpicked by the superintendent or other leaders. Asking stakeholder groups for help in identifying their own representatives—for example, asking the teachers’ union to assist in identifying teacher representatives—will strengthen stakeholder engagement and plan credibility.

**Planning Team Worksheet**

*The planning team is responsible for participating in development of the district plan: providing diverse perspectives; representing stakeholders’ interests; actively participating in planning meetings and activities; and communicating about and advocating for the planning process within the community.*

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