**Getting Started with the Planning Team**

Laying the Foundation for the Planning Process During the First Team Meeting

**Why This Step is Important:** When teams first meet to begin the planning process, it is important that they:

* Have an opportunity to reflect on planning and the impact of process on planning, connecting their own experience to the work they are about to begin
* Review their purpose as a team and set norms, making commitments to one another about how they will work together
* Begin getting to know one another, building the relationships that will support the challenging work ahead

This resource provides guidance for two activities that will accomplish these purposes in the first team meeting: a personal reflection activity that is a targeted, time-efficient icebreaker for the planning process, and a simple, and time-efficient activity for reviewing the planning team’s purpose and developing team norms.

**The Personal Reflection Activity:** In this opening activity for the planning process, participants examine how a lack of inclusion in a decision-making process can impact both the end result of that process and the way in which people may respond to and feel about the decision. This activity allows participants to quickly surface and discuss how the approach to planning impacts culture, while also connecting with and beginning to build relationships with their team members.

To conduct the personal reflection activity:

1. Introduce the reflection activity and personal reflection question to the whole group.
2. Allow participants approximately 2 minutes of silent, personal reflection.
3. Ask participants to find a partner and share their reflections.
4. Ask volunteers to share their reflections and partner discussions with the whole group.

**Time Required**: This activity can be conducted in 10-15 minutes, depending on available time. Allow participants approximately 2 minutes to self -reflect and allow turn-and-talk partners approximately 5 minutes to share with one another. Whole group share and discussion of common themes may range from 3-10 minutes.

**Text for Facilitator Presentation Slide:** Some suggested text for the presentation slide for the personal reflection activity is included below.

**Slide 1: Personal Reflection**

* Think of a situation where you, or another individual or group you know, were not included in a decision-making process
* *How did that lack of involvement affect the outcome of the process or the way you felt about the process and decision?*
* Take a few minutes to reflect
* Find a partner and share your reflections
* Share with the group

**The Norm Setting Activity:** The development of the planning team as a high performing team is critical to the success of the planning process. Team members must be both willing and able to share their perspectives with one another, learn from one another, and do the hard and messy work together that is required by the planning process. Clarifying the team’s role, members’ responsibilities, and the ways in which members commit to working together are essential to the team’s development and success.

The role of the planning team is to:

* Work together to help create the district or school plan, with members actively engaging both as individuals and as representatives of their stakeholder groups
* Identify effective, targeted, and workable opportunities for the greater community to engage in the planning process
* Represent the planning process within the community, providing ongoing two-way communication between the team and stakeholders about progress

Many districts choose to create a representative planning team, composed of members of the district’s various stakeholder groups, to lead the district’s inclusive planning process. Such a team provides the district with access to diverse perspectives and experiences that enrich and deepen the planning process and contribute to the quality of the resulting plan. In addition, inviting stakeholders to participate in the planning process helps build ownership and advocacy for the plan among both educators and the community.

**Clarifying the Planning Team’s Role and Setting Team Norms:**

1. Review the planning team’s role with the whole group, ask for questions, and discuss.
2. Introduce the need for planning team norms, reviewing what norms are and explaining that these are the commitments the team members make to one another.
3. Organize into small groups of 4 to 6 participants each. If possible, ensure that each group includes members of different stakeholder groups. Ask each small group to identify a facilitator and a recorder.
4. Ask all small groups to discuss and propose 2-3 norms for the planning team.
5. Reconvene as a whole group. Ask the facilitators of all small groups to share (and post, if on chart paper) their group’s work.
6. Review the proposed norms. Debrief as a whole group, if time permits. Assure the team they will review the draft norms at the start of the next meeting and have the opportunity to amend and revise norms as they care to throughout the planning process.
7. Collect the charts from the recorders of all small groups. Type the draft norms and include them in the slides for the team’s next and future planning retreats.

**Time Required**: The discussion of team role and development of draft norms can be accomplished in 15-25 minutes, depending on time available.

**Text for Facilitator Presentation Slides:** Some suggested text for the presentation slides for defining the planning team’s role and norms is included below.

**Slide 1: Planning Team Role**

* To work with the district or school to create a multi-year plan
* To represent the voices of stakeholders and provide diverse perspectives in the development of that plan
* To help identify workable opportunities for the greater community to engage in the planning process
* To represent the planning process within the community, providing ongoing two-way communication about progress

**Slide 2: Planning team Norms**

* *How do we want to work together to accomplish our purpose?*

**Slide 3: Norm Setting Activity**

* Organize into small mixed groups
* Identify a facilitator and recorder
* Discuss and propose 2-3 norms for team consideration, recording on chart paper
* Share proposed norms for team discussion