**Getting Started with the Action Plan Team**

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

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

* Have an opportunity to reflect on action 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 action planning process, and a simple, and time-efficient activity for reviewing the action plan team’s purpose and developing team norms.

**The Personal Reflection Activity:** In this opening activity for the planning process, participants reflect on a problematic situation associated with planning and implementation that occurred at some point in the school’s or district’s past. They examine how the organization’s planning practices and culture contributed to this situation and how an improved planning process might help the school or district avoid such situations in the future. This activity allows participants to quickly surface and discuss how their 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 challenging situation related to planning and implementation that occurred in the past
* *In what ways did the [school’s or district’s] planning practices and culture contribute to this situation?*
* *In what ways might an improved planning process help the [school or distric]t avoid such situations in the future?*
* 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 action plan team as a high performing team is critical to the success of the action 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 action 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 action plan team is to:

* Work together to create the school or district action plan, with members actively engaging both as individuals and as representatives of their stakeholder groups
* Monitor and “own” the action plan throughout implementation, assessing progress and impact and revising the action plan as necessary
* Represent the action plan within the community, communicating status and progress of work

While doing its work, the action plan team should be mindful of these guidelines:

* Apply a school-wide or district-wide lens, honoring the intended scope of work
* Consider existing structures and resources that may be tapped for action plan implementation, maximizing efficiency
* Review the action plans of all other strategic initiatives and adjust the work and timeframes of their assigned initiative’s action plan if necessary, making the total scope of work for the school or district manageable and realistic

**Clarifying the Action Plan Team’s Role and Setting Team Norms:**

1. Review the action plan team’s role and guidelines with the whole group, ask for questions, and discuss.
2. Introduce the need for action plan 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 action plan 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 action 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 action plan team role and guidelines 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 action plan team’s role, guidelines, and norms is included below.

**Slide 1: Action Plan Team Role**

* Collaborate to create the annual action plan
* Monitor and “own” the action plan throughout implementation
* Represent the action plan, communicating status and progress of work

**Slide 2: Action Plan Team Guidelines**

* Apply a school-wide or district-wide lens, as appropriate
* Consider existing structures and resources for efficient implementation
* Review action plans for all strategic initiatives and adjust work as necessary for manageable and realistic implementation

**Slide 3: Action Plan Team Norms**

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

**Slide 4: 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