***Planning for Success* Plan Assessment Worksheet**

**Instructions:** *Leadership teams can use this tool to evaluate an existing multi-year district or school plan. It is particularly useful for teams considering a plan revision and/or preparing for action planning. This assessment highlights the extent to which an existing plan is guiding work and supporting improvement.*

**PART 1: Reflecting on the Work/Lived Experience**

| **Step 1: What are the objectives, or overarching goals, currently in effect for your district or school?**  Without referring to the plan, identify objectives evidenced by current work. These objectives may or may not be those stated in the plan. List up to 5.  *Example: Strengthen social/emotional learning* | | | | |
| --- | --- | --- | --- | --- |
| **Objective 1** | **Objective 2** | **Objective 3** | **Objective 4** | **Objective 5** |
|  |  |  |  |  |

| **Step 2: What strategic initiatives did your district or school work on last year?**  List the projects or programs that were underway last year. List initiatives by the objective they are associated with or under “Other.”  *Example: Implement advisory grades 6-12* | | | | |
| --- | --- | --- | --- | --- |
| **Initiatives for Objective 1** | **Initiatives for Objective 2** | **Initiatives for Objective 3** | **Initiatives for Objective 4** | **Initiatives for Objective 5** |
|  |  |  |  |  |
| **Other:** | | | | |

**PART 2: Comparing Work/Lived Experience with the Plan**

*After completing Part 1, review the existing multi-year plan and respond to the following question.*

1. **What similarities/differences do you see between the strategic objectives and initiatives you described as lived experience and those stated in the multi-year plan?**

**PART 3: Analyzing Gaps Between Lived Experience and the Plan**

*After completing Parts 1 & 2, consider and respond to the following questions.*

1. **What do the similarities/differences between lived experience and the plan tell you about the current state of the existing plan?**
2. **What steps do you recommend, if any, for strengthening the existing plan and its ability to support continuous improvement?**