**Reviewing the Draft Plan for Quality**

Assessing and Revising the Plan as Part of an Iterative Planning Process

**Why This Step is Important:** When teams first begin the work of identifying strategic objectives and initiatives, they are grappling with their analysis and understanding of the data used in the planning process as well as with team members’ individual perspectives. They are focused on the specifics of the plan’s content and on getting that content right. As more elements of the plan are developed and a solid draft emerges, it is helpful to conduct a Quality Review so that team members can stand back, see the ways in which plan elements are working together, and ensure that all elements of the plan are aligned and the plan is coherent.

When team members conduct a Quality Review, for example, they may realize that work identified as two different strategic initiatives is actually interrelated and that the plan would be strengthened by consolidating these two initiatives as one. They may realize that some strategic initiatives are not as descriptive as they need to be for community understanding or may be framed as nouns, or categories of work, rather than with verbs that more clearly define the type of work that needs to be done within that category. At this stage, for example, a strategic initiative labeled as “Inclusion and co-teaching” can become “Design an effective inclusion model that benefits all students, possibly including co-teaching,” or “Differentiated Instruction” can become “Implement a professional learning system for instructional improvement.”

In addition, as team members step back to assess the plan as a whole, they may realize that some plan elements, such as mission or core values, are actually not aligned with the newly developed plan and need updating and revision. They may also realize that none of the proposed outcomes will help measure the effectiveness of one of the plan’s strategic objectives and decide to add an additional outcome for this purpose.

**The Process for Conducting a Quality Review:** Organize the planning team into small mixed groups of 4 to 6 participants. Provide each group with copies of the draft plan, preferably presented in the PfS Plan Template, and of the PfS Quality Review Feedback Form, which is included with this resource. Ask each small group to identify a facilitator and recorder and to then discuss their assigned Quality Review questions, documenting responses on the Feedback Form.

Each group will present their work and any proposed plan revisions as recommendations for planning team consideration. The facilitator will help the team discuss each proposed change and strive to come to consensus as the team makes decisions about final plan revisions. Facilitators will then gather the completed Quality Review Feedback Forms and provide them to district or school leaders who may find this feedback helpful as they prepare messaging about the plan for community communications. The time required for this work can range from 1.5 to 2.5 hours, depending on the small group structure and assignment of Quality Review questions.

**Note to Facilitators:** The Quality Review process includes six questions. Some of these review questions focus on specific plan elements, while others focus on the plan as a whole. Facilitators may choose to assign all or some of these questions to the planning team as part of the Quality Review, depending on the state of the plan draft, the size of the planning team and corresponding number of small groups, and the amount of time available for this activity. For example, a facilitator might choose to let each small group discuss all Quality Review questions if time is available or may choose to assign each small group two or three different questions, if less time is available. Regardless of approach, the entire planning team will benefit from a review of all six questions as each small group presents its work and any proposed changes to the plan for team discussion.

**Text for Facilitator Presentation Slides:** Some suggested text for conducting a Quality Review of the plan draft is included below.

**Slide 1: Quality Review Process**

* Organize into small mixed groups
* Identify a facilitator and a recorder
* Discuss assigned Quality Review questions and any revisions to the plan
  + Use the PfS Quality Review Feedback Form to record comments and proposed revisions
* Prepare to share small group work and recommendations with the team

**Slide 2: Quality Review Questions**

1. Does the plan reflect the common vision themes? How?
2. Are the strategic initiatives actionable?
3. In what ways do initiatives touch the classroom, changing what happens between teachers and students?
4. Will the outcomes provide meaningful measures of plan success?
5. In what ways does the plan reflect a mix of problem solving and future-oriented thinking?
6. Does the plan reflect an ambitious vision for the district or school? How?

**Slide 3: Group Presentations**

**PfS Quality Review Feedback Form**

*Purpose:* Use this worksheet to record comments and proposed revisions when conducting a Quality Review of the plan draft.

**1. Does the plan reflect the common vision themes that emerged during the planning process? How?**

**2. Are the strategic initiatives actionable?**

*Please record comments as well as any proposed revisions to individual initiatives.*

**3. In what ways do initiatives touch the classroom, changing what happens between teachers and students?**

**4. Will the outcomes provide meaningful measures of plan success?**

*Please record comments as well as any proposed revisions, including additional outcomes.*

**5. In what ways does the plan reflect a mix of problem solving and future-oriented thinking?**

**6. Does the plan reflect an ambitious vision for the district or school? How?**