

## PREPARE THE WAY

<b>GOALS</b>	<b>STRATEGIES</b>	<b>PERSONS RESPONSIBLE</b>	<b>WHAT IS NEEDED</b>	<b>OBSTACLES</b>	<b>WHEN NEEDED</b>	<b>COMPLETION CRITERIA</b>
Use the Shared Planning Process within a systems High Involvement Context to create sustained change	See below	Board of Education or Directors, Superintendent	Time, Energy, Creativity, Funding	Time, Reallocation of funds, Lack of oversight, Turf protection	As decided by Governance group  Note: Specific Dates Must Be Established	Acceptance of Plan  Targets met.
	Meet with Decision Makers	Consultant, Facilitator	Time	Need to gauge open-ness and to lessen misgivings	Immediate	Agreement to proceed with promise of cooperation.
	Create Planning Committee	Facilitator	Time	Resistance, disillusionment of process	Stage 2.	See above
	Assess the Team for High Involvement	Consultant	Time	Overcome belief that shared planning does not work, or that merely having a shared planning group automatically brings success.	Stage 3.	Completed diagnosis from Consultant with a plan for remediation.
	Train the Team	Consultant	Time	Time issues against immediacy of tasks.	Stage 4.	Consultant's verification of trained stakeholders.
	Identify all Stakeholder Roles	Facilitator	Time	Difficulty in getting all stakeholders to engage.	Stage 5.	Verbal / written agreement from all stakeholders of their commitment.
	Identify needed data	Facilitator, sub committee chairs	Time, Data, Computers	Difficulty in identifying what data is needed or in properly analyzing it.	Stage 6.	Quantitative, Qualitative, Perceptual Data identified and obtained for analysis.
	Form sub committees as needed	Facilitator	Time, Training	Time issues of participants. Leadership and charge could become vague.	Stage 7.	Record of sub committee meetings and minutes shared with the Whole.
	Inform along the way	Recorder / Reflector, Stakeholder Representatives	Time, Computer access, Clerical	Very necessary! Give and get input from all stakeholders regularly.	Stage 8.	Record of communications shared with the Whole.

## ENACTING THE PROCESS

GOALS	STRATEGIES	PERSONS RESPONSIBLE	WHAT IS NEEDED	OBSTACLES	WHEN NEEDED	COMPLETION CRITERIA
Use High Involvement principles to enact planning process	See below	Facilitator, Consultants, Boards of Governance	Time, Data, Skills, Funding	Resistance to process out of turf protection, inability to engage broad stakeholder commitment	After initial stages are completed  Note: Specific Dates Must Be Established.	Acceptance of Plan  Targets met.
	Clarify Roles of stakeholders especially within sub committees	Facilitator, Sub Committee Leaders	Direction, written charge	Vagueness re sub committee charges and relationship with the Whole needs clarity.	Stage 9.	Consensus agreement re sub committees' roles delivered to the Whole.
	Organize data for analysis	Facilitator, Sub Committee Leaders	Computers, time, easel paper, markers	Impatience when group thinks they already know from what they perceive.	Stage 10.	Data arranged in recognizable formats for analysis.
	Use root cause strategies to establish long and short term causes.	Facilitator, Sub Committee Leaders	Training in root cause analysis. Computers, time, easel paper, markers	Impatience when group thinks they already know from what they perceive.	Stage 11.	Long and short term causes agreed by consensus by the Whole.
	Generate goals and strategies to solve root cause issues.	Facilitator, Sub Committee Leaders	Training in operational and strategic planning. Computers, time, easel paper, markers	Tendency to opt for quick fixes.!!	Stage 12.	Long and short term goals agreed by consensus by the Whole.
	Develop operational and strategic plans.	Facilitator, Sub Committee Leaders	Training in operational and strategic planning. Computers, time, easel paper, markers	Tendency to opt for quick fixes.!!	Stage 13.	Long and short term operational and strategic plans are agreed by consensus by the Whole.

## CREATE A CULTURE OF FORMATIVE PULSE TAKING AND SUMMATIVE ACCOUNTABILITY!

**NOTE:** This aspect of planning within a systems, high involvement approach is most crucial. Sometimes the tendency may be that the arduous work invested in the preparing and planning process leaves stakeholders too tired to **continuously pursue** the all important follow-up phase **within the shared vision the group has evolved.**

GOALS	STRATEGIES	PERSONS RESPONSIBLE	WHAT IS NEEDED	OBSTACLES	TIMETABLE	COMPLETION CRITERIA
To ensure that the plan developed is truly acted upon, diagnosed and fine tuned, on a systematic basis.	See Below	Board of Governance, CEO / Superintendents, Principals, other stakeholders	Will, Time and Resource allocation as developed in Strategic Plans	Will. Lack of faith in plan. Lack of accountability to meet the plan.	Developed as necessary. Must be specific!	Quantitative, Qualitative, Perceptive Data that Shared Vision, Goals, have been met.
	Establish Clear Timetables	Committee Leader	Calendar, Clerical help for communication and reminder.	Attendance, especially of those who have delivered on obligations must be addressed.	Stage 14.	Meeting Dates / Plan expectations, printed and promulgated, shared with Board Of Governance.
	Establish regular pulse take meetings	Committee Leader	Calendar, Clerical help for communication and reminder.  Meetings MUST address timetable of expectations with explanations as necessary.	Tendency to delay or to make excuses may dilute the momentum of the group and of the plan.	Stage 15.	Meeting Dates / Plan expectations, printed and promulgated, shared with Board Of Governance.
	Identify issues that arise. Develop intervening solutions as necessary.	Committee Leader	Problem solving Skills training as necessary.	A negative mental model of "I told you so." could negate momentum if permitted.	Stage 16.	Issues identified, Solutions noted, and forwarded in writing to Board of Governance
	Coordinate Resources allocations, monitor as necessary.	Committee Leader	Financial and resource expenditures.	Resistance of financial officers can not be permitted.	Stage 17.	Expenditures and allocations shared with Board of Governance monthly.
	Hold those responsible, responsible!	Committee Leader AND those responsible	Clear identification or those responsible.	No body likes to be fired or embarrassed.	Stage 18.	Written Performance evaluations assess individuals' success rate and report same to Board Of Governance.
	Constantly refer to Vision, mission, goals.	Committee Leader	The Whole's embracement of the VISION.	Lack of collective commitment to Vision cannot be allowed.	Stage 19.	Written / oral presentations to Board of Governance monthly

