



## Excellence Chat II

### Exploring Step #3

*Building and Implementing Your Excellence Action Plan*

**Wednesday, December 6**

Hi Everyone. My name Ellie Miller and I am joined by Dana Taylor and Luis Alvarado for our second Excellence Chat of the 2023-2024 School of Excellence program. Thank you so much for being here!

As we wait for more folks to join, please take a few minutes to reflect on where you are in action planning- Are you building your plan? Finalizing it? Have you already started implementing it? Still analyzing your community feedback? You can let us know in the chat. This is just an easy way for us to connect with you and also a great way to see where you and others are in the program. With that connection in mind, before jumping in, Dana is putting into the chat a link to a Google Sheet where you, if you are willing and wanting, can share your contact information with other participants to connect outside of the National PTA calls. *(Note: The link is available in the Excellence Toolkit)*

This is optional. The compiled list will be shared to the Excellence Toolkit, which, as you know is a private and hidden page. However, you, of course, assume any risk in sharing your contact information and agree to being contacted by other PTA leaders. I'll flag this again for us later in the call. So, let's go ahead and get started!

## Agenda

- Looking Ahead—
  - Completing Step #3
  - Earning the School of Excellence Designation
- Deep Dive: Building and Implementing an Action Plan
- Group Discussion and Q&A

Today, as we typically do, we will begin with looking ahead—beginning with an overview of where you all should be in the program right now before briefly look ahead at your future steps to ensure you are on track to remain in consideration for the designation.

Then, we will do a little deep dive into action planning to help you better prepare and understand Step #3. And, finally, we will have plenty of time at the end of questions and discussion.

## Looking Ahead

### Completing Step #3

#### 1 Build Your Excellence Action Plan

Ensure plan is based on community feedback results, the Roadmap to Excellence and your chosen National Standard and Focus Area.

#### 2 Implement Your Excellence Action Plan

Implement your plan, document successes and adjust your efforts to account for new focuses or obstacles that arise in your community.

#### 3 Check Back With Your Community

Along the way, keep your community engaged and aware of your efforts. Use the required questions to check back with your community and measure progress.

At this point your PTA should be focused on Step #3 in which you will build and implement an action plan that is aligned to your survey results and based in best practices in family engagement. We think the easiest way to approach Step #3 by thinking about it in parts, specifically the 3 parts you see on the screen.

1. **Develop your School of Excellence Action Plan:** Your main goal here is to build an action plan to increase and improve family engagement in your school community. Your plan should be developed in alignment to your community feedback results and the National Standards for Family School Partnerships, as well as one of the provided program Focus Areas.
2. **Implement your Excellence Action Plan:** Next you put into action the plan you create, aiming to have completed most of your efforts by April. Along the way document successes and adjust your efforts to account for new opportunities or obstacles that arise in your community.  
Don't worry about changing your plans along the way. As long as you remain aligned to your community feedback and the National Standards, you are perfect in the program.
3. **Check back with your community:** The last part of Step #3 is to check back with your community by redeploying the required questions. The point of using the required questions once again is to understand the progress you have made. This is will have all the same requirements as you are familiar with through Step #2.

We will provide more information around this in the Spring, but in the interim, keep your community engaged and aware of your efforts, so they can easily recall improvements in your school community. As part of your action plan, consider specific goals around gathering feedback to ensure you stay on top of this important part of the program.

## Looking Ahead

### *Earning the School of Excellence Designation*

#### Step #4: Reflect and Summarize Progress

- After you redeploy the required questions, you will analyze the results to evaluate your progress over the school year.
- **Requirement:** Complete the Community Impact Form by June 15 deadline
  - Verify you deployed the required questions and share with National PTA your community impact results.

#### Step #5: Celebrate Success

- PTAs that complete Steps 1-4 will earn the 2023-2025 School of Excellence designation. National PTA will announce the PTAs who are designated by mid-August.
- **Requirement:** PTAs must be in good standing according to their state PTA to be designated.

**Bookmark and visit often [PTA.org/ExcellenceTools](https://PTA.org/ExcellenceTools)**

To provide you with a solid reference for your trajectory in the program, I'm going to briefly cover the final program steps – Step 4 and Step 5. In Step 4 you will complete the Community Impact Form. Much like Step #2, in this Step and Form you will verify that you used the required questions to check back with your community and ultimately share with National PTA your progress in the program, including challenges and successes.

In Step 5, you celebrate your success! As a reminder, PTAs that complete Steps 1-4 AND are in good standing according to their state PTA will earn the 2023-2025 School of Excellence designation, which will be announced by mid-August. Again, this is just a look into the future. We will provide more information and support around these steps in the Excellence Toolkit and in our email communications as we move forward in the program.

But should you have any questions along the way, email us at [Excellence@PTA.org](mailto:Excellence@PTA.org) and remember to review the information provided in the Excellence Toolkit. This is where we will post all our guidance and information to help you find success in the program.

As always, we recommend you bookmark the Excellence Toolkit at [PTA.org/ExcellenceTools](https://PTA.org/ExcellenceTools). This is your one-stop-shop for Excellence during the program and because it is a hidden resource, your best way to easily maintain access is by bookmarking the page.

## Deep Dive: Building and Implementing an Action Plan

### Action Planning Quick Items

- **Build your Excellence Action Plan with flexibility.**
  - It is okay if your efforts shift or change, just remain aligned to your community feedback, the National Standards and the Focus Areas.
- **There is no required format for your action plan.**
  - Your plan should be as unique as your community is.
  - Build, plan and implement using the tools that work best for you.
- **You are not required to submit your action plan.**
  - Later, you will have the option to share your plan with National PTA and other participants.
- **Aim to have the bulk of your plan implemented by April.**
  - Leave time to redeploy the required questions and gather feedback.

The bulk of your time in the School of Excellence program will be spent in this step and we have available many resources to support you—plus more that are forthcoming. To begin our deep dive, I'm going to go through a few quick key items---

- Build your Excellence Action Plan with flexibility in mind so that you can adjust along the way as necessary. While you are expected to set and aim for the goals you make, things happen. So, be sure to account for that in terms of your timelines, tasks and expectations, so that you can easily pivot, as necessary. For example, if your plan intends to introduce experts on the arts to your school consider both virtual and in-person options in the event of issues with securing space or inclement weather.
- With flexibility in mind, there is no required format for your action plan, rather your Excellence Team should develop and implement your action plan in the format and manner that will drive the most change in your community. That means if your PTA has a standard way of building plans, don't feel compelled to use the provided templates. Instead, incorporate the program requirements, like the Standards and your Community Feedback into your own method.

## Deep Dive: Building and Implementing an Action Plan

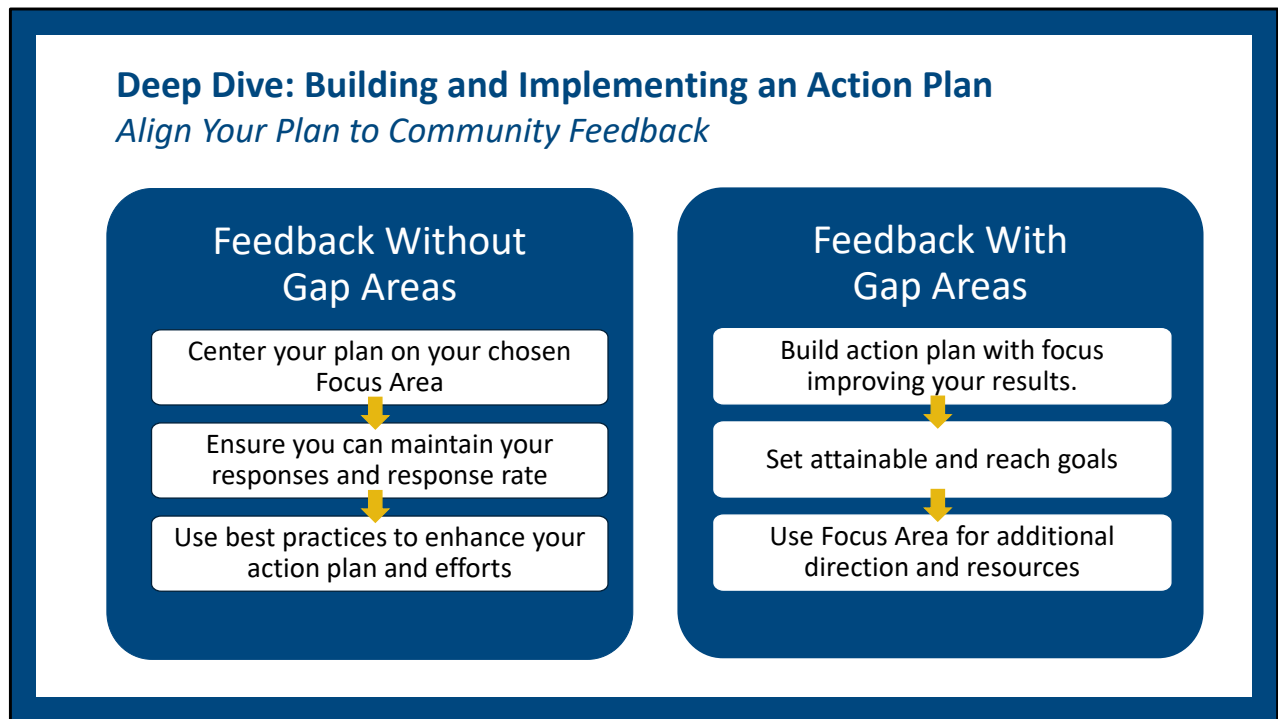
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  - Later, you will have the option to share your plan with National PTA and other participants.
- **Aim to have the bulk of your plan implemented by April.**
  - Leave time to redeploy the required questions and gather feedback.

- You are not required to share your Action Plan with National PTA, but over the next week or so you can expect an email inviting your PTA to share your plans and goals with National PTA through the program platform. This is optional but we will compile the responses we receive and share them out with the larger cohort for continued reference and idea generation. We also recommend completing the Form as best practice for checking in with your work. A lot of times, PTAs will start work on a plan and more full steam ahead without stopping to see how things are going. This causes Teams to lose track of their goals and intentions in the program. Additionally, if you wait until it is too late to find out if something is not working, you miss the chance to call an audible and adjust, so you actually make the impact you want to see.
- Once you've finalized your action plan, we recommend your PTA aim to have the bulk of your work complete by April to you have the time to collect feedback and review your progress in the program. As a reminder, with the Community Impact Form due June 15, you should be working backwards from this day as you consider your action plan and your survey redeployment. Now, I'll transition to some meatier information—specifically aligning your plan to your survey results, the national standards and the focus areas.



Questions?



As you know, your action plan must be aligned with your survey data, the program Focus Areas and best practices in family engagement, specifically the National Standards. Because the questions you all were required to use are aligned with the National Standards, we will first consider your community feedback results as they relate to your action plan.

There are two scenarios that can happen – in one, you receive overwhelmingly positive survey results with all ALWAYS responses and no gaps and in the other you find gaps in your survey responses.

**No gap areas:** If you found no gaps in your community feedback – great work! Assuming you have a significant number of people engaged, this means that you are likely achieving fundamental aspects of family school engagement and partnerships. However, you should also take a further critical lens to your results. Perhaps, ALWAYS was the overall highest response for one question but there may have been a close second. It is important to consider these areas to solidify your PTAs efforts and to help you maintain your positive responses when you reengage your community.

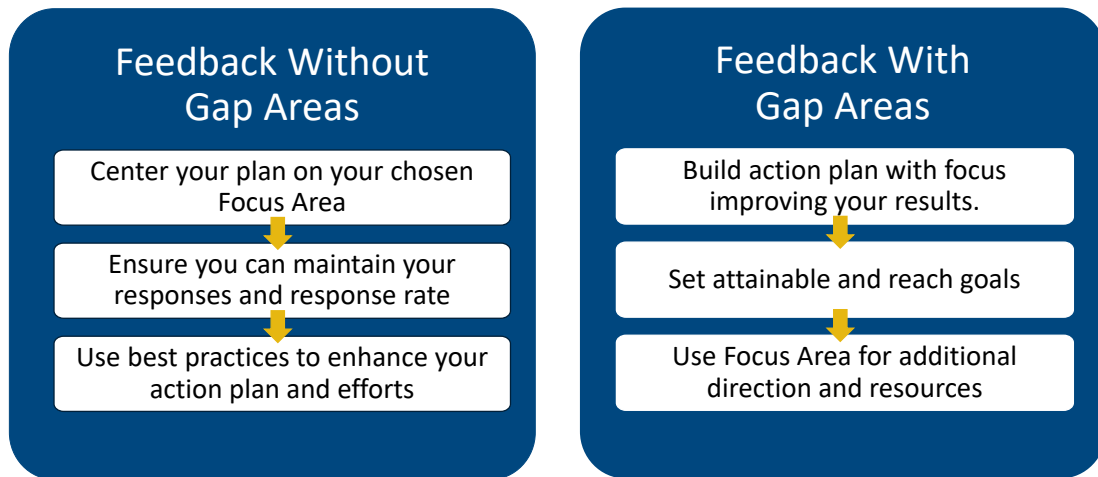
With that in mind, if your PTA falls into this scenario, we highly recommend your action plan consider methods and tools to enhance your efforts in gathering community feedback. Perhaps you only used a survey, this could be a great time to try out listening sessions, which are uniquely successful at building community. Finally, if your PTA falls into this area and you truly see no room for growth in your current efforts, consider setting reach goals for your Team. For example, perhaps your PTA has long had a goal of building sustained service projects in your community. You could build your action plan with the intention of testing the idea with your members, sourcing potential partners, planning our your schedule of events and allocating relevant funds and resources, all with the National Standards carried through specifically.

This is a great example of what it looks like to take your PTA’s School of Excellence work to the next level.



## Deep Dive: Building and Implementing an Action Plan

*Align Your Plan to Community Feedback*



**With gap areas:** Now, if you do have gaps in your survey that is perfectly fine and is exactly where you should begin in your action planning. Your end goal should be to move the needle to ALWAYS as the highest response or, if you're hosting listening sessions, to make progress in specific areas of issue.

As you review your gap areas to create your action plan develop Reachable Goals so you set yourself up for success. If you know that your PTA can take tangible steps in one area prioritize those in your action plan. Here you can use your Focus Area to anchor the work, which helps your PTA from going too big and getting overwhelmed.

While your Focus Area will not exactly align with the required questions and the National Standards. They are meant to help you focus your work, so start with your gaps and work backwards.

Maybe you initially selected Health, Safety and Wellbeing because your PTA had already planned efforts there, but your community feedback results reveal gaps around communicating effectively, especially with school information. Here, you could shift your Focus Area to be Education & Enrichment and work on what your PTA already has developed, rather than developing new information, tools or materials related to health and safety.

While we do want you to set attainable goals, we also want you to seek new opportunities, so you can also set more reach goals. For example, let's say your results reveal opportunities around community engagement and you selected the Focus Area Diversity, Equity and Inclusion. While you could find partners in a whole host of areas and change your focus area, you could instead set a reach goal of engaging a certain number of community organizations that represent or can help education your community around the different histories, experiences and/or languages that are relevant in your school community.

As you can see through all these examples, I very intentionally had thread related to the Focus Areas and the National Standards. So I'll next touch on both. However, in the interest of preserving time for discussion, please know that we will provide more information on action planning in a forthcoming Excellence Lesson.



As you construct your action plan around gap areas, you will automatically be focusing on certain National Standard for Family-School Partnerships and it is highly important that you remain anchored in these best practices in family engagement. Specifically, you will want to include these principles in the process of building your action plan with forethought rather than hindsight.

Each of the National Standards is broken down with a thorough description and goals that further describe the Standard in action. There are also a set of indicators that describe the more specific actions that schools and PTAs can take to achieve the goal. All of this information is meant to help inform and guide your PTA, but you are encouraged to think outside of the box and think about how you can align your PTAs work to the National Standard.

As shared in my earlier examples, the point of the Focus Areas is to help your PTA home in on specific avenues for school improvement, rather than taking small disparate actions across a number of different areas. The School of Excellence focus areas—Education and Enrichment, Health, Safety & Well-Being, and Diversity, Equity & Inclusion—provide many unique pathways for to enhanced family engagement and school improvements.

However, digging into one of these broad areas can be difficult, if you don't have a starting point. That's where the Roadmap to Excellence saves the day, which I will talk about now, along with other key Step #3 resources.

## **Deep Dive: Building and Implementing an Action Plan**

### *Key Resources and Tools*

#### **Customizable Templates and Materials Available in the Excellence Toolkit**

- Template Action Plan from National PTA
- Sample Actions Plans from past Schools of Excellence
- Excellence Lessons

#### **The Roadmap to Excellence**

- Compiled resources from National PTA and partner organizations
- Work smarter, not harder—start with vetted materials and suggested action items that:
  - Align to specific action items within each Focus Area
  - Free to low-cost programming and program models
  - Advocacy tools and materials
  - Research databases and resources

In the Excellence Toolkit under Step #3, and in the What's Happening Now? Section we have provided many resources and key details to help you find success in the program.

Before diving into the Roadmap, I'll highlight that we have provided a template action plan, as well as sample Action Plans created by previous Schools of Excellence, to support you in embedding the principals early on in your work. As you'll remember, we do not require a specific design for you action plan, but using these customizable resources will ensure you are on the right track. Here is a direct link to Step #3 in the Toolkit:

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Now, let's discuss the Roadmap to Excellence! The Roadmap is a program tool that provides information and recommendations from National PTA and our partners that directly relate back to the Community Feedback Survey (Step #2), Focus Areas Standards/Goals provided (Step #3). The Roadmap removes the guesswork by providing specific actions that your PTA can use to build an Excellence Action Plan and aligns resources to those actions to help your PTA build out and implement your action plan. *(Note: A direct link is available in the Excellence Toolkit).*

In the upcoming Excellence Lesson I mentioned, we will provide a close look at the Roadmap. For now, I'll flag that the tool has (3) sections

- The first section of the Roadmap outlines key program details and reminders to keep you on track.
- The second section outlines each of the Standards/Goals and the indicators as examples of actions your PTA can take to make progress in that specific area.
- In the final section, you will find a selection of drop-down menus that provide curated resources, research and programs around each of the program Focus Areas. This section is meant to make planning easier as it outlines each area with useful context and information, as well as specific actions or efforts your PTA could use in your action plan.

Along with the Roadmap remember to seek resources around you – your school district, your administrators, your State PTA, etc. If you are basing your efforts in the Standards and your community feedback - there are so many ways you can take your action planning to the next level! And, what is most important, is to work smarter, not harder! It is a lot of information but it is there to guide you and for you to use however you see fit.

As always, if you have any questions along the way, please feel free to email us at Excellence@PTA.org. We're here to help!

## Introducing

### ***Optional Excellence Office Hours***

- Beginning in January 2024
- 15-minute office hour meetings from 3-5 EST on Mondays
- Ask questions and brainstorm with National PTA staff

### ***Optional Opportunity to Connect***

- Share your contact information to connect with other leaders in the program
- The list will be available in the Toolkit at [PTA.org/Excellence Tools](https://pta.org/ExcellenceTools)

1. Beginning in January 2024, our team will be offering 15-minute office hours, or mini TA sessions for enrollees. This is your opportunity to ask questions and brainstorm with National PTA staff.
2. In case you missed this earlier, we are also sharing in the chat, an optional Google Sheet in which you can share your contact information with other participants to connect outside of the National PTA calls. The compiled list will be shared to the Excellence Toolkit, which, as you know is a private and hidden page. *(Note: A direct link to this resource is available in the Excellence Toolkit).*

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## Discussion and Questions

We are here to help!  
Email us at [Excellence@PTA.org](mailto:Excellence@PTA.org).