



**SCHOOL OF
EXCELLENCE**

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Excellence Lesson VI
Conducting an Action Plan Checkpoint

- Complete an action plan checkpoint
- Submit the Share Your Plans Form
- Share your progress with your community

Welcome! In Excellence Lesson 6, we are going to talk about action plan checkpoints as a best practice for finding success in your PTA planning and programming, especially in the School of Excellence program. We will cover ways to conduct a mid-year checkpoint and how you can utilize the results to engage your community. We will also discuss sharing the optional share your plans form to share your plans with National PTA and your fellow program participants.

Action Plan Checkpoint

Checkpoints determine what has been accomplished, what's remaining, and the challenges faced in the process.

- Benefits of checkpoints—
 - Help keep the project on track
 - Uncover pain points that hindered progress
 - Develop solutions and process to avoid pain points in the future
- Plan for at least (1) mid-year checkpoint
 - Include all Excellence Team members and individuals involved in implementing your plan
 - As relevant, include administrators, teachers and/or PTA leadership
- Use a dedicate notetaker to document conversations, key points and ideas

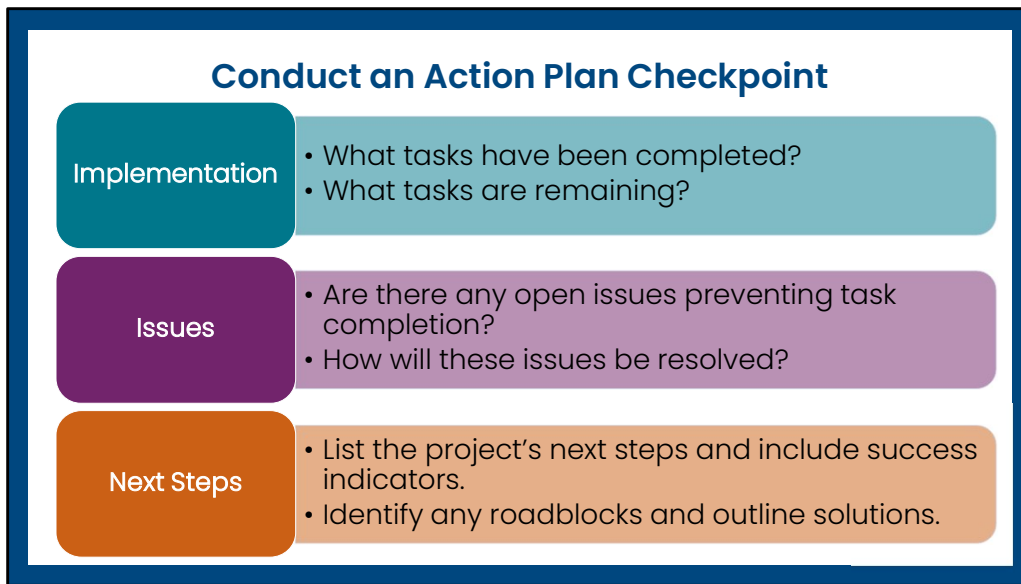
An action plan checkpoint is a list of points you and your Excellence Team go through to see what has been implemented, what's remaining, and the challenges faced in the process.

Checkpoints help keep a project on track and allows you to discuss what might have hindered your progress, or led you to success, so you can solve for those pain points or capitalize on your success.

The regularity of these checkpoints can be determined by the size of your action plan, timelines and your Excellence Team's goals and capacity. Whatever the frequency, it's important to have these meetings, as they will give you a clear idea of your plan's status. As such, we recommend planning at least (1) checkpoint at the middle mark to ensure you're progressing towards your goals and to plan for upcoming steps, especially redeploying the required community feedback questions.

For your checkpoints, **we recommend including all Excellence Team members involved in executing the project and/or making decisions or approvals.** This means you should include, as relevant and as you're able administrators, teachers or PTA leaders so they are aware of your Team's progress and potential areas where they might need to be involved and/or lend support, especially when handling challenges.

As part of your checkpoint, **you should designate a note keeper who can take thorough notes, synthesize the conversation and support in outlining action items.** The notes taken should also be used to inform other programming your PTA is involved in. If you find that something is working well in your Excellence Action Plan, you should work to incorporate the same successful strategies across your work to build consistency and impact in your PTA's overall efforts,



There are (3) elements that can guide conversations in an Action Plan Checkpoint. (Helpful resource: <https://fellow.app/meeting-templates/project-implementation-checkpoint-template/>)

- 1) **Implementation:** This is where you discuss how far along your team is with your plan, checking off what has been done and focusing on your successes. This is a great time to discuss the National Standard on which you are focusing in the program, as well as your community feedback. Discuss with your team how you are meeting the mark on both and be specific. As you talk about the bits of the project that have been executed, discuss how the team did it. If there are pending items, discuss why the elements have not been completed, which will bring you to the next element of your checkpoint.
- 2) **The Issues:** Discussing the problems faced while executing your action plan is important in ensuring that any mistakes aren't repeated and developing strategies for how to handle those problems in the future. Consider what obstacles you've faced when implementing your action plan, list the issues and extensively discuss them. Once you have established what the issue is, the next step is to look for solutions. How can you solve the problem? Are the solutions long-term or short-term? These are some of the answers you should focus on getting by the end of your meeting. Remember that if you don't get through everything, that is okay! Just schedule another checkpoint to keep the conversation going.
- 3) **Next Steps:** Once you have confirmed and discussed the implemented requirements for the project and the issues your team faced when undertaking the tasks, discuss what is next. Talk about the next phase of the project and any anticipated roadblocks. This will help the team prepare accordingly to finish the project with minimal issues. Discussing the next phase also helps keep everyone on the same page about the project progression.

Along with discussing the remaining elements of your action plan, discuss your next (2) requirements in the School of Excellence program -- gathering community feedback and completing the Community Impact Form. Develop your strategy for deploying the required community feedback questions – will you use a survey or a listening session or both? Set your measures for success – For example, are you looking for more responses in total, more diverse respondents? What are the specific areas where you anticipate seeing progress?

Complete the Share Your Plans Form

The optional form is a reminder and guide to complete your Action Plan Checkpoint.

Consider the following during your checkpoint:

- Which National Standard have you focused on and how is it guiding your work?
- How did your community feedback inform your action plan? What efforts have you completed that will improve the results?
- What is the main goal you have within your selected program Focus Area? Are you meeting that goal so far?
- Outline at least (1) accomplishment. What do you think made you successful?

Our optional Share Your Plans Form includes several questions that you will be discussing in your action plan checkpoint.

- **As mentioned, you should be examining which National Standard you are working towards** to ensure it remains embedded in your work. Outline the specific elements of your plan that align to the National Standard and make sure you are on track with that element. Are certain aspects of your work towards the Standard that are less successful compared to others? Discuss what might be causing those issues and how you can adjust your efforts with the Standard in mind specifically.

Be specific. Don't just generally say "We emailed all families and so we are Communicating Effectively." Instead include specific examples that you can refer to later in the program and that you can incorporate into other work your PTA is doing.

- **You should also be focusing on how your community feedback informed your action plan** and outline what action items you have taken that directly align to your community's needs. If you find some of your work is more slow-going, consider other positives revealed in your feedback and think about how you can use what your PTA is good at to improve your plans. If you had largely positive results, dig into one of the areas to help solidify your PTA's success and be sure to explicitly share that success with your community. One of the best ways to shore up confidence in your PTA is by reminding your community of all the successful work you do. This is a great way to help develop your measures for success for when you redeploy the required community feedback questions. The more familiar you are with the feedback more likely you will be able to set measures of success that are attainable and realistic.

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- **We also recommend exploring the goals you have around your selected program Focus Area** to better understand your impact and, as necessary, reprioritize your efforts. Remember, the point of the Focus Area is to help your PTA work toward depth over breadth of impact. If you find that your work is getting too big and having less of an impact, consider paring down your work and creating secondary goals. If you find your work has gravitated to another area, for example from Health and Safety towards Diversity, Equity and Inclusion, consider if you should reprioritize your efforts to dig into those Diversity efforts, this is another opportunity to set those secondary goals.
- Finally, remember to **outline your accomplishments so far**. This is important to keep track of your plans for the purpose of completing the required Community Impact Form in Step #4, but more importantly it will encourage your Excellence Team to keep working hard and you can report the successes back to your community to keep them engaged in the process.

We encourage you to complete the form, which is available in the program platform and in the Excellence Toolkit through the March, to document your conversations and efforts in the program. This will help you keep everything documented in one place, the program platform, so you can easily reference those items for future program forms, like the Community Impact Form. It is also a great way to share your efforts with National PTA and other program participants.

Touch Base With Your Community

Engage your community in the process by sharing details from your checkpoint and your progress in the program.

- Create a high-level outline of the work and share your greatest accomplishment(s)
 - Using pictures, videos or other media
- Detail upcoming plans and include a call for volunteers to get involved
- Connect your PTA's work to
 - Your community feedback results
 - The School of Excellence program
 - The National Standards

On that note, let's discuss using your checkpoint as an opportunity to touch base with your community.

Along with helping to ensure you are on the right track, completing an action plan check point also gives you an opportunity to gather points and content to report back to your community on your PTA's efforts. In many communities, families have no idea how much work the PTA is doing compared to the school and it is the responsibility of the PTA to share that work.

Engaging your community to share these details can look a lot different ways but ideally it will convey at least (1) accomplishment, which you can take from your responses to the Share Your Plans Form. As you're able, we recommend including pictures, video or even stats on your work to contextualize the impact of your hard work and to excite and inspire your community.

To keep interests piqued after sharing the good news, you should also highlight upcoming plans and especially include a call for volunteers. Busy parents want to ensure their volunteer time is worthwhile, so connecting future plans to your recent successes you will build faith in community members.

Finally, when you touch base with your community on your plans, you should be conveying your progress and efforts through the School of Excellence program, specifically. This second part is important for several reasons

- It reminds your community of the feedback they provided in the fall and shows that your PTA is putting it to good use.
- It also helps keep the program fresh in the mind of families, so when you redeploy the survey, you can gather further and new responses.
- It elevates your PTA's work by connecting it to nationally considered best practices for family engagement, which will highlight your PTA's intention and consideration around doing what is best for the community.



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Email Excellence@PTA.org with questions.

Thanks for tuning into this Excellence Lesson! Hopefully, you are leaving this Excellence Lesson with a better understanding of an action plan checkpoint and the Share Your Plans Form! Please stay tuned for future Excellence Lessons and, as always, email Excellence@PTA.org with any questions along the way.