



User Guide

Team Based Planning Tool



DESCRIPTION:

- This tool is designed to help staff teams reflect on their site's data and develop plans for improvement.
- It can be used as part of an initial planning process or to re-check data on existing improvement plans.
- Your team can use this tool to examine a single dataset, or multiple datasets. The subject or type of data does not matter.
- The reflection process found in this toolkit is research-based, it is highly recommended to follow each step of this Team Based Planning Tool with fidelity.
- Time Requirement: It takes 2 hours to complete this tool with a team if you are reviewing a single dataset. For each additional dataset (attendance data, YPQA data, etc.) add an additional 30 minutes of time to allow enough time for discussion.
- If needed, this tool can be split into multiple meetings by spending the initial meeting reviewing one, or several datasets and using a following meeting to prioritize goals and create improvement plans.

LEARNING OBJECTIVES:

- Review data from all desired tools used at your site.
- Interpret data in the context of programs and organizations.
- Identify next steps and actions for continuous program improvement and create improvement plans.

GENERAL MATERIALS:

- Space with Wi-Fi is recommended.
- A large table or several tables for your group to spread out materials.
- Computer
- A projector or screen large enough for the entire group to see.
- Speakers loud enough for the entire group to hear.
- Flip chart paper and sticky notes.
- Markers, pens and pencils.
- Snacks and drinks

DOCUMENT LIST:

- Copies of all datasets your team will be reviewing for each participant.
- 1 Single Dataset Reflection Guide for each dataset that will be reviewed.
- "What's on your Plate" Menu Worksheet.
- Improvement / Action Plan Templates (print several off, one Improvement Plan Template will be filled out per improvement goal.



Step	Description	Video Timestamp	Materials (if needed)
Set-up	Set up your room with all materials, computer, projector / screen and prepare all documents from the document list for your group. Pre-load or download the Team Based Planning video. Check your audio and visual technology.	n/a	See all materials in both the general material list and document list.
Introduction to the tool	If this is your first time using this tool, watch the introduction information. This can be done prior to starting your meeting.	0:00 – 1:45	n/a
Agenda / Housekeeping	Provides an overview of the process and the agenda your team will follow as they move through this tool.	1:45	n/a
Community Builder	Even if your team knows each other well, community builders help set a tone for the rest of your meeting. Use one of the community builders provided in the video recording or pause and conduct your own.	4:05 ("KWL" 4:20) ("Mood Gallery" 4:30)	Video recording on screen, or any materials needed for your custom activity.
Process Overview	This section provides an overview of the process your team will move through during this tool. It explains each step, including it's purpose.	4:41	n/a
Data Category Overview	This section provides an overview of the four types of data categories, and why it is important to collect a multitude of data types.	7:00	Optional: Data Collection Worksheet
The beginning of the official reflection process begins at 11:32			
Dataset Reflection: Step 1	In this section, your team will objectively view your dataset and record any results that stand out to them. That can include high numbers, low numbers, or anything in between that you may wish to consider as part of your improvement planning discussion.	12:10	Dataset being reviewed, Single Dataset Reflection Guide
Dataset Reflection: Step 2	After you objectively record your "highs and lows," use the guiding questions in the video to add context to your data. Record key takeaways from your discussion on your guide, flip chart paper or whiteboard.	12:54	Dataset being reviewed, Single Dataset Reflection Guide
Dataset Reflection: Step 3	This is the last step of your dataset reflection. Use your notes from Step 1 and 2 to determine any areas your team would like to improve. Note: do not record HOW you will improve yet, instead, only record WHAT you would like to improve.	13:39	Dataset being reviewed, Single Dataset Reflection Guide
Dataset Reflection Section Note: In order to allow enough time for meaningful conversation and to hear multiple perspectives, spend 30-45 minutes (or longer if your team needs more time) discussing each dataset.			



Repeat Dataset Reflection Steps 1 – 3 for each dataset your team is reviewing			
Prioritize Improvement Areas	In this section, you will add additional factors to your discussion, such as stakeholder priorities, funder-driven goals and other key initiatives with the “What’s on your plate” activity.	15:21	Completed Single Dataset Reflection guides for each dataset, Menu worksheet.
Action Plan Brainstorming	Now that your team has decided what they will be focusing on to improve, brainstorm HOW you will reach your goals with your team. Once your team has decided what they will focus on, complete the Menu Worksheet by recording what your team’s easy (appetizer), medium (main course) and hard (dessert) goals will be.	17:54	Menu Worksheet, paper, writing utensils, flip chart paper, sticky notes, etc.
Writing Improvement / Action Plans	The final step of the Team Based Planning tool is to complete your Program Improvement Plan or Action Plan templates. You will fill out one template for each goal that you prioritized in the “What’s on your plate” activity. You will fill out one form and record all steps necessary to reach your team’s easy (appetizer), medium (main course) and hard (dessert) goal, through following the video’s instructions.	21:39	Completed Menu Worksheet, Improvement / Action plan templates, one for each improvement area / goal.
Reflection	Reflect and close your meeting using the prompt on the video recording or by using your team’s favorite reflection activity.	Closing	Video recording on screen, or any materials needed for your custom activity.

