

# A GUIDE TO COLLABORATIVE PLANNING

OFFICE OF COMMUNITY SCHOOLS  
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Collaborative leadership and practice at NYC community schools enable diverse stakeholders to plan and implement a vision that best supports the school community. The desired goal is that school and partner resources, both financial and human capital resources, are allocated to ensure equitable outcomes for students and their families.

## **Collaborative Planning & Continuous Improvement**

Three beliefs drive continuous improvement at NYC community schools.

- Real-time data guides decisions about student needs and the equitable allocation of resources.
- People and partnerships closest to the issue have the solution.
- Facilitation and a focus on results move groups from talk to action.

Data acts like a flashlight to highlight assets and needs, change, evaluate and improve, and discover impact. One way NYC community schools engage in continuous improvement is by conducting three formal collaborative planning meetings over the school year. Collaborative planning should be occurring on an ongoing basis.

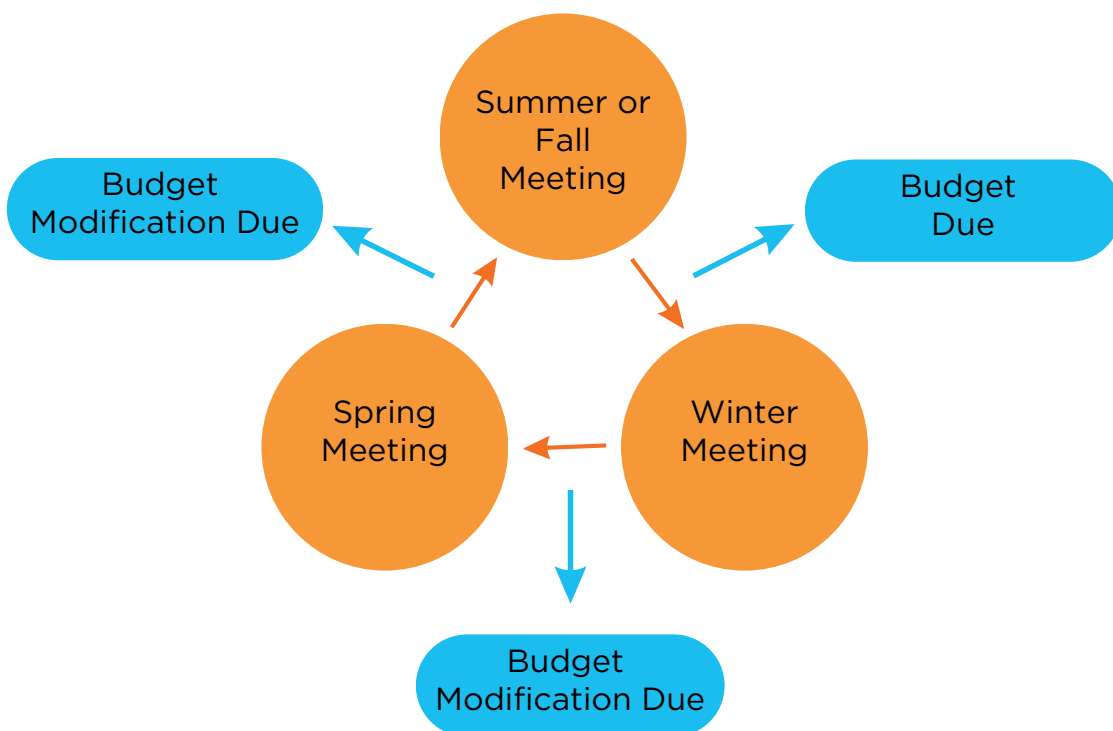
In these meetings, school leaders and CBO partners:

- Set goals for and/or monitor the progress of community school programming by reviewing varied sets of data;
- Make data-driven decisions to ensure the equitable allocation of resources to meet timely student needs;
- Engage in collaborative leadership and practice, a core feature of community schools.

## The Collaborative Planning Cycle

The first collaborative planning meeting occurs during the summer or fall (July or August). The second meeting occurs during the winter (December or January), and the third one occurs during the spring (typically April). The timing of these meetings complements the deadlines that the community school budget and modifications are due (see Figure 1).

**Figure 1. Collaborative Planning Cycle and the Budget Timeline**



## Who Attends Collaborative Planning Meetings?

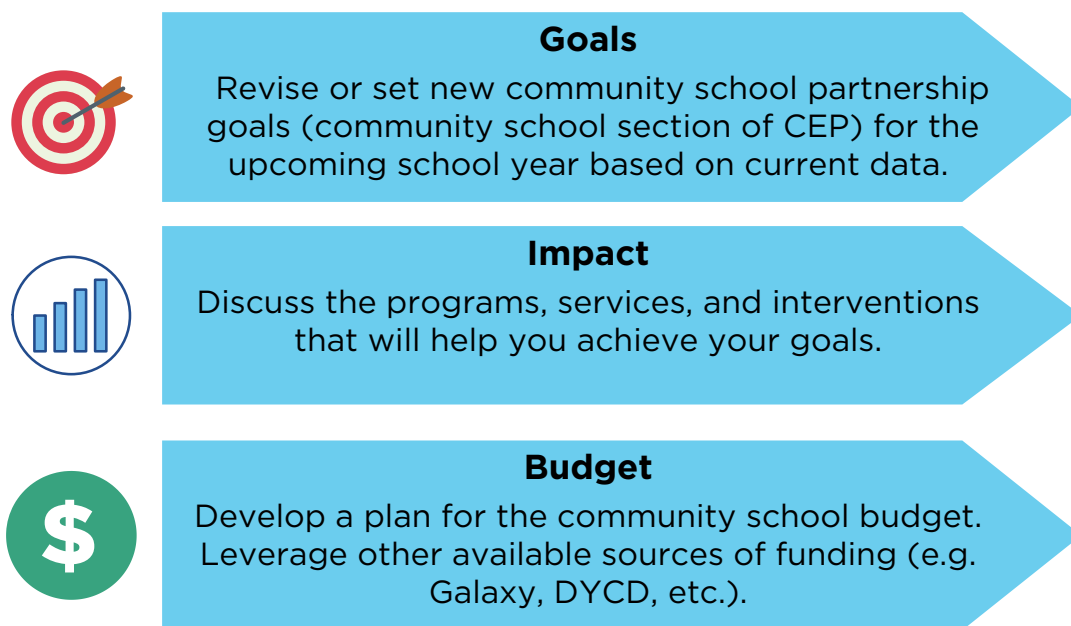
In most cases, the community school director (CSD) with the support of the CBO supervisor prepares for and facilitates these meetings, and coordinates the follow-up. Participants include:

- School staff (principal, assistant principal(s), teacher(s), parent coordinator, guidance counselors, among others)
- Lead CBO staff (CSD, CBO supervisor, fiscal representative, among others)
- Parent/family representative(s)
- Student representative(s), if applicable
- Other CBO partner representatives
- School Mental Health Manager (if available)
- OCS Program Manager (if available)

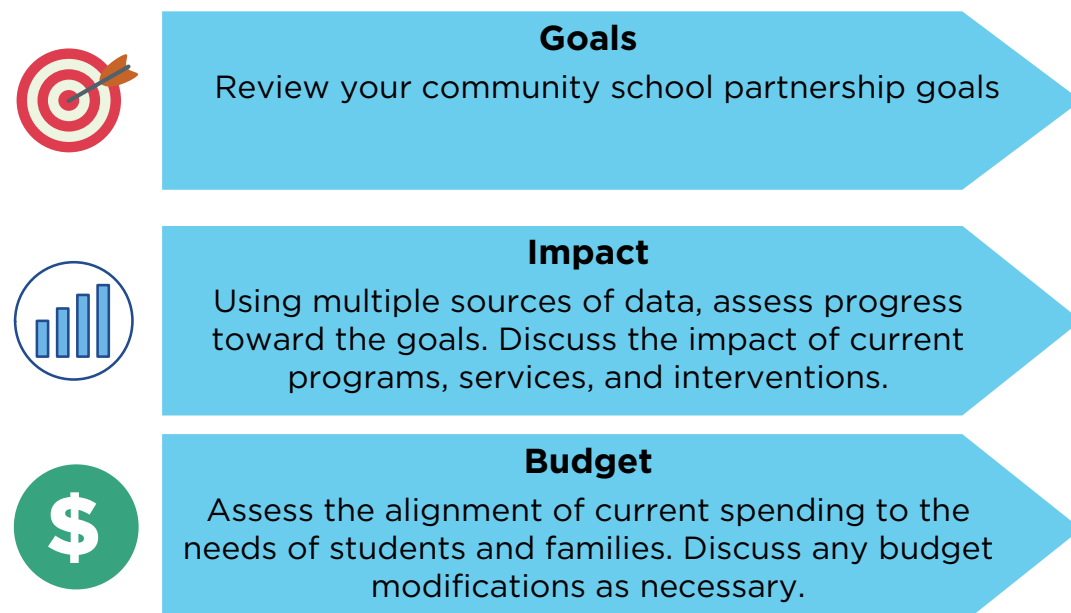
## Key Meeting Components

Effective collaborative planning meetings initiate and help monitor cycles of improvement of programs, services, and interventions. It is recommended to cover these three key areas in every meeting: goals, impact and budget. Depending on when in the school year the meeting is taking place, the content covered may look different. Figures 2 and 3 display how the meeting that occurs during the summer or fall may differ from the winter and spring meetings.

**Figure 2. Summer or Fall Meeting Components**



**Figure 3. Winter and Spring Meeting Components**



## Before Your First Collaborative Planning Meeting

Before your team conducts the first collaborative planning meeting, review this checklist:

- Do we have SMART goals for the community school partnership? (Refer to the community school section of the Comprehensive Education Plan, or CEP).
- Have we identified the types of data we will use to assess the effectiveness of programs and services?
- Have we incorporated input from diverse stakeholders (students, families, school staff, community partners, etc.)?
- How are we incorporating findings from the Assets and Needs Assessment to ensure student and family needs are being met?
- Have we reviewed all available sources of school and CBO funding that can be leveraged for community school programming?

## Preparation for the Meeting

The meeting facilitator (generally the CSD with CBO supervisor support) can use the following checklist to prepare the necessary materials. As you prepare, think about how you may incorporate various subgroup data and input from stakeholders who will not be present at the meeting.

- Meeting agenda
- Meeting sign-in sheet (use OCS-provided "Collaborative Partnership Agreement" document)
- A list of community school partnership goals
- Community school programming and services data
- Budget information
  - For the summer or fall meeting, the lead CBO prepares a copy of the OCS-provided budget detail spreadsheet.
  - For the winter and spring meetings, the lead CBO prepares a budget v. actual report.



Have meeting participants engage in a pre-work activity, such as reviewing the data that will be presented at the meeting and preparing responses to select questions ahead of time.

## Post-Meeting Tasks

After the meeting, the lead CBO will need to submit the following materials to OCS along with the relevant budget documents.

- [Meeting agenda](#) and any supplemental materials (e.g. data reports shared at the meeting)
- Meeting minutes with action commitments noted
- [Budget detail spreadsheet](#) (after the summer or fall meeting) or [budget modification spreadsheet](#) (after the winter and spring meetings), if modification to the budget is necessary
- [Meeting sign-in sheet](#) with participant signatures

## Tools and Resources

<b><u>Sample Collaborative Planning Meeting Agenda</u></b>	Use this results-based meeting agenda provided by OCS and make additions as necessary. It includes the Collaborative Partnership Agreement (signature sheet) you will need to submit to OCS.
<b><u>Plan-Do-Study-Act (PDSA)</u></b>	Learn more about this improvement cycle model that provides a structure for iterative testing of practices and processes. Read more about it on <a href="#">The Institute for Healthcare Improvement</a> website. Utilize the <a href="#">PDSA worksheet</a> .
<b><u>Data Wise Project (Harvard University)</u></b>	The Data Wise Project at Harvard University supports educators in using collaborative data inquiry to drive continuous improvement of teaching and learning for all students. Find resources on their website.