CBA Planning Proficiency Survey
Instructions

Purpose of Planning Proficiency Survey

Effective front-end planning is required for the successful implementation of a CBA. It is important to examine your current school counseling planning processes to determine how the processes can be improved.

Critical aspects of a high quality CBA planning process include characteristics in the following tables. The statements can be viewed as results you want to achieve in your planning. They are grouped by common themes. The primary question to be answered is: How well are we currently performing each process/accomplishing each result?

Header Row

This template contains two columns. Titles of the columns are provided in the header row.

Statement	Code	Priority

- "Statement" refers to critical characteristics of an effective planning process.

- "Code" allows you to indicate whether you have mastered the process ("1") or whether the process needs to be improved ("2").

- "Priority" allows you to indicate the sequence in which you work to improve processes (1=High Priority, 2=Medium Priority, 3=Low Priority).

Instructions for Completing the Template

Step	Action Steps	Description
1	Decide who will complete the survey	– The survey should be completed by any counselors or counselor administrators who are involved in the school counseling strategic and annual planning processes.
2	Complete the survey	– It is recommended that the survey be completed by a planning team. – Come to a consensus on whether to enter a "1" (process has been mastered) or a "2" (process requires improvement) and enter the code into the right column for each statement.

Step	Action Steps	Description
3	Develop improvement plans	– Develop an action plan for making improvements to all processes/tasks assigned a "2".
4	Implement improvement plan	– Implement your improvement plan, prioritizing your efforts so that needed improvements can be made in a timely fashion that impacts your ability to effectively conduct strategic and annual planning.
5	Redo survey	– Redo the survey at the end of a planning cycle to identify areas still in need of improvement.