



## Generating and Organizing Planning Data Instructions

### Purpose of Generating and Organizing Planning Data Templates

This document contains instructions for three templates that will help you gather and organize information which you can use to develop strategic and annual plans for your school counseling program:

- **Ideas to Result Statements Brain Dump.** This template will help you define your needs and translate your need statements into result statements.
- **Result Statement Details.** This template will help you organize data needed to plan for achieving each result statement.
- **Action Step Details.** This template will help you organize data needed to successfully complete each action step used to achieve a result.

The data gathered consists of data elements that are critical to any planning process and are basic building blocks for the development of effective plans. The data elements in each template will be discussed separately below, followed by a combined set of instructions for using the three templates to organize your ideas and translate them into action plans.

### Instructions for Ideas to Result Statements Brain Dump Template

The purpose of this template is to define need in your program and translate need statements into result statements from which plans can be developed. It is a “brain dump” exercise in which you enter all your thoughts into the template and then use the template to organize your ideas in a format which can be easily converted into planning templates.

#### Header Row

This template contains five columns. The titles of each column are provided in the header row.

Need Statements	Result Statements	RG#	RS#	Evidence
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### Step-by-Step Instructions for Completing Brain Dump Template

The data elements are described in the instructions table below:

<b>Data Element</b>	<b>Description</b>
Need Statements	<ul style="list-style-type: none"> <li>– Plans are developed to address needs. Brainstorm the needs in your school counseling program that can be addressed through the planning process. Enter one need per row. Keep the need statement general. More detailed information will be developed in the action plans.</li> </ul>
Result Statements	<ul style="list-style-type: none"> <li>– A need statement can easily be converted into a result statement. For example, a need statement might state, “We need to be trained in the effective use of data-based decision making.” The result statement can be written, “Train all counselors to become proficient in using data-based decision making processes.”</li> </ul>
RG#	<ul style="list-style-type: none"> <li>– It doesn’t take long before your list of results statements is growing longer and longer, and it is becoming more and more difficult to manage the list in ways that make sense. The easiest way to avoid this dilemma is to assign Result Group numbers (RG#) that can be used to organize similar statements into planning categories.</li> <li>– To help you get started, here is an organizational theme you may find useful. First, three broad groups are established.               <ul style="list-style-type: none"> <li>+ 1.0 CBA Program Components</li> <li>+ 2.0 Organizational Support</li> <li>+ 3.0 School Community</li> </ul> </li> <li>– Depending on the length of your list of result statements, you may wish to expand your organizational scheme to include sub-divisions under these three categories. For example,               <ul style="list-style-type: none"> <li>+ 1.1 CBA School Counseling Student Standards and Competencies</li> <li>+ 1.2 CBA Curriculum</li> <li>+ 1.3 CBA Student Assessments</li> <li>+ 2.1 Support Infrastructure</li> <li>+ 2.2 Roles and Accountabilities</li> <li>+ 2.3 Policies and Protocols</li> <li>+ 2.4 School Counseling Data Management</li> <li>+ 2.5 Professional Development</li> <li>+ 3.1 Family Engagement</li> <li>+ 3.2 Community Partnerships</li> <li>+ 3.3 Public Relations</li> </ul> </li> <li>– Once you have developed your list of result statements, assign a Result Group code to each row. It is not necessary to worry about the order when you initially enter your information. Once entered, sort the table to sequence all the rows.</li> </ul>

<b>Data Element</b>	<b>Description</b>
RS#	– It is helpful to assign a Result Statement number (RS#) to each statement. The number will be used in the Result Statement Details and Action Step Details templates.
Evidence	<ul style="list-style-type: none"> <li>– It is helpful, when writing result statements to also think about how you will know when the result has been successfully achieved. In other words, what evidence will allow you to accurately determine your progress and achievement?</li> <li>– For example, evidence that school counselors are proficient in using data-based decision making could consist of a written description of how data was used to determine student needs, select appropriate activities and interventions to address the need, and assess the impact of having delivered the activity/intervention.</li> </ul>

Once you have entered all your information, assigned your codes and sorted the table, you can transfer your results codes and statements to the “Result Statement Details” template.

## Instructions for Result Statements Detail Template

The purpose of this template is to gather and organize basic planning information associated with each result statements. This template is a worksheet to document information about a single result statement. Data elements used in this template and instructions are described below.

### Header Rows and Step-by-Step Instructions

<b>Data Element</b>	<b>Description</b>
RG#	– Number of Results Group (e.g., 1.0, 2.0) or Sub-Group (e.g., 1.1, 2.3) from the “Ideas to Results Statements” template.
Result Statement #	– Number assigned to the Result Statement.
Result Statement	– The result to be achieved.

<b>Data Element</b>	<b>Description</b>
AS#	– Action Step #. You may wish to wait until all action steps have been entered before assigning AS#’s.

<b>Data Element</b>	<b>Description</b>
Action Step	– Decide on the actions you will need to take to successfully achieve the result statement. Enter the primary action steps into the template, one action step per row.
Begin	– Enter the date when work on the action step is begun.
End	– Enter the projected date by which the action step is to be successfully completed.
Owner	– Enter the person who is primarily responsible for ensuring the successful completion of the action step. This person does not necessarily have to do all the work but is responsible for its completion by the due date.
Cost	– Enter the projected monetary cost of completing the action step.
\$ Source	– Enter the potential funding sources to cover the cost of completing the action step.
Evidence	– Enter what to look for to establish that progress is being made toward successfully completing the action steps and/or that the expected result has been achieved.
Comments	– Enter any comments you wish to retain relating to this result statement.

Once you have entered all your action steps and related information into the template, assigned your codes and sorted the table, you can transfer your action step codes and statements to the “Action Step Details” template.

## Instructions for Action Step Details Template

The purpose of this template is to gather and organize basic planning information associated with each action step. This template is a worksheet to document information about a single action steps. Data elements used in this template and instructions are described below.

### **Header Rows and Step-by-Step Instructions**

<b>Data Element</b>	<b>Description</b>
RG#	– Enter the number of the Results Group (e.g., 1.0, 2.0) or Sub-Group (e.g., 1.1, 2.3).

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Data Element	Description
RS#	– Enter the number assigned to the Results Statement.
Result Statement	– Enter the result to be achieved.
AS#	– Enter the Action Step #.
Action Step	– Enter the primary action sub-steps that must be successfully completed to achieve the result are entered here, one action sub-step per row.
SS#	– Enter the Action Sub-Step #.
Action Sub-Step	– Enter the primary action sub-steps that must be successfully completed to achieve the result are entered here, one action sub-step per row.
Begin	– Enter the date when work on the action sub-step is begun.
End	– Enter the projected date by which the action sub-step is to be successfully completed.
Owner	– Enter the person who is primarily responsible for ensuring the successful completion of the action sub-step. This person does not necessarily have to do all the work but is responsible for its timely completion.
Cost	– Enter the projected monetary cost of completing the action sub-step.
\$ Source	– Enter the potential funding sources to cover the cost of the action sub-step.
Evidence	– Enter what to look for to establish that progress is being made toward successfully completing the action sub-steps and/or that the expected result has been achieved.
Comments	– Any comments you wish to retain relating to this action step.

**General Instructions for  
Completing All Three Templates**

Step	Action Steps	Description
1	Complete brain dump exercise	– It is helpful in planning to get everything that is known or expected on the table at the very beginning. This is best accomplished in a collaborative setting. Conduct a brain dump with your colleagues on your needs and what types of results you want to achieve.
2	Complete result details template	– The Result Statement Details template enables you to develop critical details required to achieve the specified result. This is a worksheet for gathering and organizing relevant information. It is designed for use with a single result statement. Reproduce as many copies of the template as you have statements.
3	Complete the action step template	– The Action Step Details template enables you to develop critical details required to successfully complete the specified action step. This is a worksheet for gathering and organizing relevant information. It is designed for use with a single action step. Reproduce as many copies of the template as you have action steps.
4	Incorporate data into school/district plans	– Districts/schools typically have established formats for documenting plans. Incorporate relevant information gathered in these templates into your school or district planning formats.
5	Implement plans	– Use the plans you develop to guide your implementation efforts.