

Success Planning Community of Practice

Designing, expanding, and improving systems of personalized, relationship-based support for children and youth



Community Pre-Work

We are excited to learn with and from all of you over the course of the Success Planning community of practice and to welcome you to Cambridge, MA in a few weeks. As mentioned during the June virtual launch, we would like each team to do some brief pre-work to make our in-person time even more productive.

Below are two activities for your team to complete before our July workshop. The goal is to gather preliminary information on your context, resources, and vision for Success Planning. We do not expect (or want!) you to come to the workshop with a fully developed plan—that is the intent of the community of practice. Instead, we want you to come with a collective understanding about Success Planning strengths, challenges, opportunities, and gaps in your community. Your team will continue build on your initial pre-work ideas throughout the Success Planning workshop activities. We expect this work to take no more than four hours and be completed as a team. You are welcome to engage additional stakeholders. The two components are:

- Success Planning Component Inventory: Complete the table provided in this document.
- Community Readiness Building Blocks: Have robust conversations to identify the additional partners, resources, and conversations that will be required in the coming months.

Component Inventory

Communities nationwide have implemented various strategies to focus on improving student outcomes. Promising practices and valuable lessons have come from integrated student support models, Community School strategies, school/community partnerships, and wraparound service programs adopted by local communities. Student Success Planning can significantly contribute to these efforts by offering a mechanism to leverage a community's resources, leadership, and wisdom to provide individualized student support to meet students' needs through a holistic approach.

Based on extensive research from The EdRedesign Lab (EdRedesign), student Success Planning is a framework that includes four distinct components: 1) a Navigator; 2) a plan; 3) a comprehensive network of services and opportunities; and 4) a data platform. For each of the components, we have identified essential elements as well as flexible design choices that each community will make to tailor Success Planning to their local context.

Navigator

As part of Success Planning, Navigators meet regularly with children, identify their needs for academic and non-academic supports and opportunities, and serve as a conduit for developing a plan and ensuring those needs are met. Navigators also work with families in a variety of ways, and with local communities determining the nature and extent of this engagement. The Navigator serves as the direct connection to the child and family; in some communities, they also have a role in implementing the plan while in others this falls to a separate coordinator.

Plan

While the relationships between Navigators and children have value in themselves, the goal is to build on the knowledge of each child gleaned from these sessions to develop a concrete plan for action. This should include referrals to a range of supports and opportunities that can change over time as the child's needs and interests change. Key to doing this is having the staffing and infrastructure to create and update the plans and to provide the connective tissue between children, families, supports, and opportunities. In some cases, the Navigator might also be the one to develop the plan and identify supports, but often there will need to be another person or team to fill this role.

Comprehensive Services

Success Planning initiatives should partner with a robust set of community organizations, service providers, and other entities to build a system of supports in the areas of academics, social-emotional learning (SEL), enrichment, physical and mental health, and social services. These supports would ideally be coordinated by a dedicated staff person or community-wide coordinating body who cultivates relationships with providers and has deep knowledge of the services they provide.

Data Platform

The data platform would ideally include information about students' academic and non-academic strengths and interests as well as needs for support in the areas of academics, SEL, enrichment, physical and mental health, and social services. It would contain the plan and information about what services and supports the student is receiving. It should be secure, easy to use, and allow for changing information over time. Some data platforms include a closed loop referral capability that generate automated referrals for services. Data platforms can range from free, basic programs to customized ones with sophisticated capabilities.

The table below outlines the essential and flexible functions of each component:

FOUR SUCCESS PLAN COMPONENTS		
Component	Essential	Design Choices
Navigator	<ul style="list-style-type: none">• Dedicated 1:1 relationship between student and caring adult• Meet on a regular basis• Navigator trained to holistically support student(s)	<ul style="list-style-type: none">• Who serves as Navigators?• How many students does one Navigator work with?• What is the meeting cadence (Weekly? Monthly? Quarterly?)• When/where does Navigator meet with student?• What types of questions are asked (i.e., academic; health; family; extracurricular, etc.)?
Plan	A formal way to identify and capture student strengths and needs and to document the supports and opportunities that students are being referred to and are receiving.	<ul style="list-style-type: none">• What information is included?• Which kinds of services are included?• Who is responsible for putting the plan into action and maintaining updated information?• How do you capture and store

		information (e.g., platform; Google doc; handwritten)
Comprehensive Services and Opportunities	Partnerships across health (physical and mental), academics, social services, and extracurricular partners	<ul style="list-style-type: none"> • Which organizations will provide services and opportunities? • How are students referred? • How do students access services? • How are services funded? • Where are services provided?
Data Platform	A way to track student supports and opportunities identified in the plan	<ul style="list-style-type: none"> • Which individuals/sectors have access to platform? • Which type of data platform will be used? • What is the data-sharing capacity?

In preparation for the July workshop, we would like you to identify existing elements of the above components in your home community. We recognize that some of your communities already have well-developed components, while others have building blocks in the form of related elements such as an advisory function in the schools or existing community partners. We recommend completing this inventory with your entire team since you each bring a different perspective and set of creative resources. By looking holistically and completely across your community, you can design a Success Planning strategy that capitalizes on all the community strengths and assets.

When completing this table, consider all the resources and assets in your community from across a range of sectors (schools, after-school programs, nonprofits, social services, healthcare, etc.)	
Component	What do we currently have?
Navigator	
Existing school or community structures that enable a caring adult to have a 1:1 relationship with every child	<p>Carbondale Elementary School District #95</p> <p>There are currently no school or community structures in place that enable 1:1 relationships with every child.</p>
Opportunities, during or outside of school hours, where adults meet individually with students on a regular basis	<p>There are no opportunities during or outside of school hours, where adults meet individually with students on a regular basis.</p>

Training for adults to holistically support students through academic, health, social services and wellbeing supports	Because there are areas of the holistic approach missing, no training exists for adults to support students through all areas.
Plan	
A formal way to identify and capture student strengths and needs	The Data, action & intervention, supporting youth (DAISY) meeting process is used to capture student strengths and needs.
Plan asks about academic, health, social, and extracurricular needs	DAISY asks about academic and social/behavior needs. Health and extracurricular needs are not addressed.
Plans are updated regularly	Plans are currently updated on a monthly to quarterly basis.
Comprehensive Services	
Partnerships across health (physical and mental), academics, social services, and extracurricular partners	Partnerships exist in all areas; physical and mental), academics, social services, and extracurricular partners.
A clear referral system	There is a referral process in place. It is separate for each area of need.
A way for students to access services (e.g., transportation; financial support, etc.)	No clear process exists for students to access additional services. Resources are available and are provided.
Data Platform	
A way to track student progress toward goals identified in plan	There is a way to track student progress toward goals through the TylerSIS platform. The data tracking process can be improved.
The platform has data-sharing capacity across sectors/partners	The TylerSIS data platform is not shared across sectors/partners
Enabling Conditions	
Other contextual programs, resources,	

or enabling factors that can promote Success Planning in your community.	There are several enabling factors that can promote Success Planning; Memoranda of Understanding (MOU) with community organizations (Centerstone, Shawnee Healthcare, Southern Illinois Healthcare) and a built collaborative relationship with Carbondale Junior Sports.
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Community Readiness Building Blocks¹

In addition to inventorying the components, it is equally important to understand your community's readiness for a Success Planning initiative. The questions below are designed to encourage an intentional planning process as your team considers the adaptive components of Success Planning—those focused on changing mindsets, practices, and leadership—in addition to the technical components of implementation.

Pre-conditions

According to [research](#) on collective impact, there are three critical pre-conditions. We are referencing this evidence-based literature because the place-based and cross-sector nature of effective Success Planning implementation requires collaborative action that has similarities to collective impact:

- The presence of influential champions that can bring school districts, cross-sector leaders, families, and students together to begin a collaborative planning process
- Sufficient resources (financial and human) to support the planning process and student success infrastructure for at least one year, in addition to a long term (5 year) commitment to the work
- The urgency to address child and youth success in new and different ways demonstrated by frustration with existing systems by multiple actors, including policymakers and funders

We encourage your team to discuss these pre-conditions and identify areas of strength and opportunities to grow.

	Not Yet	Establishing	Developing	Mature	Evidence
Influential Champions	X	Conversations have been had with key political, social, and philanthropic leaders to generate their buy-in for Success Planning	Key political, social, and philanthropic leaders have expressed an interest in supporting Success Planning	Key political, social, and philanthropic leaders have publicly committed their time, support, or funding toward Success Planning	- - -
Human Resources	X	A subset of individuals, perhaps from a small number of agencies or organizations, lead and execute the bulk of the work.	Working groups are clearly structured, functioning, and productive.	Established backbone organization with dedicated staff to support facilitation, data collection, and communication management.	- - -
Financial Resources	X	The Success Planning team has documented a budget and fundraising plan, with personnel dedicated to fundraising.	Some public and private funding has been secured, as well as strategic and in-kind support.	The work is fully funded for 3-5 years through diverse funding sources.	- - -
Sense of Urgency		There is a current challenge in the community that has been identified for which Success Planning can support. X	Data and political will has been generated on a pressing challenge that can be addressed by Success Planning.	Families, community members, and leaders have mobilized and committed to Success Planning as a solution to tackle an evidence-based challenge.	- - -

Aligned Vision

Another condition of collective impact focuses on an aligned vision. It is important that key stakeholders see Success Planning as an approach to improve child and youth outcomes. Please reflect on the following three statements and to what extent they apply to your community context:

Statement	Reflections
A core group of multi-sector partners are committed to developing all four components, in partnership with the community and with a focus on equity.	Yes. The team is multi-sector. There is currently a team in the planning phase.
Success Planning may start as a pilot at an individual or several schools or programs, but the goal is to scale the framework across all students in the district. EdRedesign believes it is important for Success Planning to be implemented for all children within a given school or program rather than for a demographic subset. All children should have a Navigator and a plan, although each plan will look different.	The aim is to scale the program from the initial 2 schools to all four district schools.
The school district embraces the concept of supporting students holistically to include physical and mental health; social services; and extracurricular activities, in addition to academic supports.	The school district uses a holistic approach but is building the area of extracurriculars.

Nuts and Bolts of Collaboration

While it is entirely feasible to start the process with a blank slate, it is helpful to understand existing entities, practices, programs, and initiatives that align with Success Planning. Below are some questions to consider in advance of the July workshop:

Statement	Reflections
Is there a history and culture of collaboration among potential organizations for Success Planning? If yes, how can you build on past success?	No
Is there a neutral convener who has the respect of Success Planning stakeholders that is best positioned to lead the planning process?	No

Do relationships exist that will enable engaging a broad, cross-sector group of actors to lead and implement the Success Planning effort? If not, how will you begin that process?	Yes
Are stakeholders committed to using data to set the agenda and improve the work over a period of time?	Yes

¹ The Collective Impact Forum's [Readiness Assessment](#) informed the development of this section of the pre-work.