

Step 5: Action Planning and Dissemination

Concepts: Articulating Long-Term Goals, Milestones, and Action Items; Sharing Your Success Story

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Overview

People interested in improvement planning at any level—district, school, classroom—might find the Create an Action Plan activity organizer in this step helpful, but it is most valuable to those who have completed all the steps in the Guidebook. If you have completed Steps 1 through 4 of the Guidebook, you have a set of completed activity organizers that document the collegial discussions you have had analyzing **best practices**, how they look in action, and how you want them to look in your own organization.

In this step, you can refer to those activity organizers as you complete a concrete action plan for making your vision a reality. And as you move toward success, you are provided with a simple template to record your progress and develop a **success story** that can be shared on The Knowledge Loom as a learning tool for others.

Even if you have not completed the other steps in this Guidebook, consider using the activity organizers in this step to organize your thinking about improvement in your district, school, or classroom. And most important, use Activity Organizer 5.2 to create a success story about your own site and submit it for inclusion on The Knowledge Loom.

2

ACTIVITIES

You will work as a team to create an action plan, using the activity organizers you completed in Steps 1 through 4 to guide the process, and you will establish a way to document your school improvement work—resulting in a success story that can be shared on The Knowledge Loom. During the Step 5 extension activity, you will review your organization’s **school improvement goals** and **action items**, then think about committing to personal action items that will support the ‘big picture.’ A participants’ evaluation form is provided for your convenience in Appendix C.

DURATION

Open-ended (consider a series of short team sessions in which the plan is recorded and then presented to stakeholders). Recording the improvement process to create a success story is ongoing.

PREPARATION

This overview and the section, How Do I Move From Planning to Success?, can be copied and distributed to introduce participants to important concepts and processes used in this step.

Note:

Terms appearing in boldface text are defined in Appendix A: Glossary.

How Do I Move from Planning to Success?

“*Benchmarking fails when it is seen as a solution, rather than the starting point.*”

Industry CEO

It is important to point out that this Guidebook is only a beginning. School improvement is an ongoing process and obviously does not end after a plan for one or two goals has been set. It requires taking action on your plan, systematically revisiting and monitoring results, and returning to resources like The Knowledge Loom for information and inspiration as new needs arise. These are important next steps in advancing school improvement.

If you have completed Steps 1 through 4 in this Guidebook, you have selected a **focus theme** for your work and studied research-based **best practices** related to this theme. You have examined best practices already in action at your own site, and you have analyzed what other schools, districts, and organizations are doing to achieve success. You have also reviewed the research behind the best practices, and have explored a variety of Web-based resources that further support your goals and interests for school improvement. You have done all this through a **collaborative inquiry** process, and as people think together, they define and evaluate assumptions and establish a collective understanding about where they are and where they want to go. Now that you and your colleagues are speaking the same language, you are ready to define and implement a plan for the achievement of your targeted **school improvement goals**.

3

Long-Term Goals, Short-Term Goals (Milestones), and Action Items

If you did not realize it before beginning your work with The Knowledge Loom, once you have completed several steps in the Guidebook, you will recognize that implementing best practices means much more than saying you are going to do it. Implementation, of course, is a process, and it does not happen overnight. The work that you and your school improvement team are doing will take months, perhaps a few years, to complete. In order to keep your eyes on the prize, it is important to articulate from the beginning what it is you are working toward—your **long-term goals**.

In order to reach the long-term goals, you will need to map out a series of **short-term goals** or **milestones**. These smaller goals will allow you to focus your energy on specific, doable tasks, while keeping the long-term goal in mind. Try to imagine the two or three major phases or big steps toward reaching each long-term goal, and make each of those a short-term goal or milestone.

Once you have identified the big steps to take toward your long-term goal, it is time to begin identifying **action items**—things you can do today, this week, or this month to reach the milestones. After your plan has been outlined, there is one more significant step—sharing with others.

Documenting and Sharing Your Success

The **benchmarking** process you engaged in as you used this Guidebook will be successful if you have:

- Established clear objectives driven by results,
- Included all key stakeholders in the process,
- Studied and accurately interpreted data, and
- Planned soundly and devised built-in mechanisms for evaluating your progress.

4

Others can benefit greatly from your eventual success, and it is important for you to feel a professional responsibility to tell your story of school improvement.

There is nothing like a good story to illustrate a point. A story ties an explanation of what to do with an example of how to do it. The Knowledge Loom Web site (<http://knowledgeloom.org>) links proven best practices to narratives about districts, schools, and classrooms where these practices have been put into action, to create a living textbook of what works and how it works. Now that you have embarked on a school improvement effort, we invite you to tell YOUR story on The Knowledge Loom and help colleagues learn from your success. Activity Organizer 5.2 will help you document your story and prepare it for submission to The Knowledge Loom.

Loom Locations

You will probably spend most of your time completing Step 5 away from The Knowledge Loom, concentrating on your own school improvement goals and referring back to your notes and completed activity organizers from Steps 1 through 4. However, revisiting details from the online success stories can provide you with ideas for how to set your long- and short-term goals and action items. Look especially at the “**Feature Story**,” “**Design and Implementation**,” and “**Replication Details**” sections of each success story related to your selected Knowledge Loom spotlight.

To find the success stories for a specific best practice:

- 1 Go to The Knowledge Loom home page (<http://knowledgeloom.org>) and click the spotlight title you wish to explore.
- 2 Select “**Investigate this Spotlight**” or “**GO**” from that spotlight’s cover page.
- 3 Click the “**Policy, Stories, Research**” link immediately below the best practice(s) you wish to study. You will see a list of success stories listed by site name and location.
- 4 Click on the name of each site to view its story.

Note: In some spotlights an index page will appear after clicking “**Investigate**” or “**GO**.” In these cases, you will need to select a subcategory of best practices and click “**Learn More**” before you see the “**Policy, Stories, Research**” links.

Design & Implementation

Results

▶ Replication Details

Contact Information

Evaluating Criteria

Take Action

Print This Story

Send This Story to a Colleague

Join the Dialog

Panel Discussion

Have Your Say

Ask an Expert

[LOG IN](#)

[REGISTER](#)

Replication Details

Replication Tips

NOTE: If you have not already read the 'Design and Implementation' section, selecting that from the menu before reading further will provide a context for the replication details below.



Mary Russo, Principal 1990-6

[Hear Mary Russo comment on getting started. \(transcript\)](#)

A mapping process was used to assess phases, reforms, and points of reference:

Summary of Mapping Exercise

| 1990 | 1991 | 1992 | 1993 | 1994 | 1995-6 |
|------|------|------|------|------|--------|
| | | | | | |

Major Phases

| Preparation | Putting structure in place | Deeper structural development | Change in ways of doing business | Control of resources | Consolidation and future planning |
|-------------|----------------------------|-------------------------------|----------------------------------|----------------------|-----------------------------------|
| | | | | | |

Development/Reforms

| Reflection on status | Team development | Schoolwide Program development | Local of control | Recognition Staff development | Future orientation Learning |
|----------------------|------------------|--------------------------------|---------------------|-------------------------------|-----------------------------|
| Scouting reform | Taking stock | Inclusion | Training | Use of talent | |
| Training | Vision | Teaching & learning | Inquiry/ evaluation | Induction | |
| New leadership | Expectations | Partnerships | Outcomes | Technology | |
| | Customer focus | | Teacher teams | | |

Figure 1: Example of use of a timeline in the “Replication Details” section of a success story.

Step 5—Activity 1

Planning Goals, Milestones, and Action Items

GOAL

Create an action plan to realize your selected long-term improvement goals.

MATERIALS

Activity Organizer 5.1—Create an Action Plan

Activity organizers and notes completed during Steps 1 through 4 in this Guidebook (if available)

Activity Organizer 5.3—Disseminating Your Action Plan

DURATION

Open-ended

RATIONALE

An action plan is most effective when created by a team of strategically selected colleagues with a vested interest in the end results. Depending on the focus theme that has been selected for this plan, the team might be all the people in a curricular department, a cross-curricular school improvement team, or some other sort of representative grouping of colleagues and stakeholders.

Activity Organizer 5.1 – Create an Action Plan

When this activity organizer is complete, you will have a list of steps and actions to take toward reaching your long-term goals.

Begin by jotting your long-term goals in the first column. Discuss and define two or three big steps toward achieving each long-term goal; write these short-term goals in the middle column. Create your to-do list in the Action Items column.

| Long-Term Goals | Short-Term Goals or Milestones | Action Items |
|---|--|---|
| <p><i>Get teachers involved in analyzing student data and using analyses as a basis for setting their own professional development plans.</i></p> | <p><i>Improve technology tools and procedures for collecting and sharing student data.</i></p> | <p><i>Talk to Director of Tech. Test new student info system. Find out about intranet.</i></p> |
| | <p><i>Restructure school schedule to allow for team data analysis meetings.</i></p> | <p><i>Talk to scheduling committee. Develop a prototype schedule. Investigate funds for release time.</i></p> |
| | <p><i>Establish submission and review procedure for professional development plans.</i></p> | |
| <p><i>Make collaborative problem-solving the basis of all professional development offered in the district.</i></p> | | |
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Directions: Step 5—Activity 1

1

Identify a team of strategically selected colleagues to identify improvement goals, milestones, and action items. Provide them with all the activity organizers and notes completed during Steps 1 through 4 in the Guidebook (if available) to guide their decisions about improvement planning.

2

Begin by identifying your long-term goals in the first column of Activity Organizer 5.1. Long-term goals can be those that you reach when you have implemented a number of best practices, or they can be the best practices themselves. In Step 2 of this Guidebook, you identified and studied a number of best practices related to your focus theme.

3

For each long-term goal, discuss and define two or three big steps toward achieving the long-term goal. Fill these into the second column as short-term goals or milestones.

4

In the last column, create your to-do list—those actions you can do today, this week, or this month toward reaching your milestones.

9

Once the action plan is complete, brainstorm ideas for disseminating it to all stakeholders for implementation. List your thoughts about dissemination on Activity Organizer 5.3. Be sure each appropriate stakeholder is provided with a copy of the action plan. As you begin dissemination of the plan to various stakeholders and constituents, elicit their ideas for other ways to disseminate the plan, thoughts about possible stakeholder groups that may have been overlooked (teachers, administrators, parents, students, community members, local universities and businesses), and ideas for keeping communication lines open over time as the plan is implemented. Consider not only sharing the action plan, but also sharing copies of The Knowledge Loom success stories that influenced the plan's development.

Activity Organizer 5.3—Disseminating Your Action Plan

If you have been using the Guidebook prior to completing this activity, you know that a good way to engage with Knowledge Loom content is to share your thoughts and ideas about it with local colleagues, members of the broader education community, and members of The Knowledge Loom online community. Now that you have created an organizational action plan with long-term goals, milestones, and action items, list ways you can disseminate this plan, get feedback, and garner buy-in from all stakeholders.

Extension: Broadening the Conversation

Action plan dissemination and ongoing communication ideas:

Sample

Step 5—Activity 2

Documenting Your Organization’s Success Story

GOAL

Document and then share your school improvement success story with a national network of educators.

MATERIALS

Activity Organizer 5.2—Our Organization’s Success Story

DURATION

Open-ended and ongoing

RATIONALE

The Knowledge Loom offers stories about best practices in action. Where do these stories come from? They depend on people like you—districts, schools, and individual educators who are committed to educational excellence, who have found a way to achieve it, and who are willing to share with others about how they did it. Developing a success story to submit to The Knowledge Loom is a good way to track the completion of action items listed on your improvement plan and document the steps toward measurable results.

Activity Organizer 5.2 is provided as a template that will guide you over time as you record facts about your school and its path to success. Once the facts are recorded, you will use them to write a narrative about your success.

Activity Organizer 5.2—Our Organization's Success Story

When you complete this activity organizer, you will have:

- A record of where you started your improvement process and why,
- A record of the steps toward realizing your goals, and
- A record of results related to your efforts.

On separate paper, record information about each of the fields noted in bold on this template for documenting a Knowledge Loom success story. You will write lists of facts, followed by a narrative (The Facts and The Story). Record the facts over time. Write your story summary and narrative after all the facts have been recorded. E-mail your completed story (or questions about the development of your story) to loom@lab.brown.edu.

THE FACTS

These can be recorded as bulleted lists, charts, and graphs of progress over time (rather than in narrative form). They are intended to give you and readers an overview of your steps to success.

Selected Spotlight Title:

This relates to the focus theme of your improvement planning. Your story will be linked to this Knowledge Loom spotlight. **Note:** Some success stories might link to more than one spotlight, such as Adolescent Literacy in the Content Areas and Professional Development.

Selected Best Practice(s):

Copy one or two of these from the list of best practices displayed in your selected Knowledge Loom spotlight. These correlate with the benchmarks or long-term goals represented in your action plan and will be the focus of your work and your success story activities and results.

Best practice #1:

Best practice #2:

Name of School:

City, State:

Grade Levels:

Setting: (urban, suburban, rural)

Type: (public, private)

Demographics:

What is the size of your staff and student population? Are there other distinguishing characteristics such as free and reduced lunch, number of transient population, etc.

Background and Context:

What is currently going on at your site that you want to integrate into your work? In a sense, this is your long-term solution.

Design and Implementation:

How did you/will you implement the best practices from your copy of your action plan in this section?

Success story:

*Samuel Mason Elementary School
Roxbury, MA*

At the Samuel Mason Elementary School, situated in an old warehouse district in Boston, the students aren't the only ones learning more than ever before. From secretary to teacher to principal, every staff member here is required to formulate a personal development plan each September. Although all of the teachers by now have obtained dual certification in regular and special education, they are still expected to continuously identify what they don't yet know and to structure their learning accordingly. Summer and release-day time is set aside for school-wide work, and creative scheduling throughout the year enables grade-level teams and study groups to meet once a week during the normal school day to discuss upcoming efforts. Lead teachers in each subject area are available to assist others with incorporating new practices.

To view the rest of the story, go to The Knowledge Loom (<http://knowledgeloom.org>). Click the "Search" tab, find the key word box and input: "Samuel Mason Elementary School".

Directions: Step 5—Activity 2

1

Assign an individual, a pair, or a small team to operate as the historians of your improvement process.

2

Begin by having the historians record the following information listed on Activity Organizer 5.2: Selected Spotlight Title, Selected Best Practices, Name of School, City, State, Grade Levels, Setting, Type, Demographics, Background and Context, and Contact Information. They can also begin to list information in the Design and Implementation section, drawing from the completed action plan (as well as including a copy of the action plan itself). This section will be added to and adjusted as the improvement process progresses.

3

As the organization progresses through the action plan, the historians will keep records of action items completed, milestones achieved, qualitative and quantitative results, and adjustments made in the plan. The developing success story should be posted where all those involved in the work can readily access it—either online or in a binder in a central location.

4

It is important that others within the organization who are involved with the improvement work play a role in reporting progress that can be added to the developing success story. Encourage them to periodically check the story and comment on missing details. Consider establishing a periodic method of sharing individual progress and results that can be added to the story. The historians will add these details to the Design and Implementation, Replication Details, and Results sections of the template.

5

Once your organization feels that sufficient progress has been accomplished with your action plan, write a short summary and feature story about your success. E-mail the completed template and success story to loom@lab.brown.edu. Include your contact information, and we will get back to you about next steps for posting the story on The Knowledge Loom.

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Note: The Knowledge Loom also can accommodate other types of media in addition to text. We can discuss the possibilities of including documentation you might have available, including audio files of teachers or students talking about their work, video files of teachers in action, student work samples, slide presentations, etc. This type of media provides a powerful vision for others about how to create plans of their own based on your success.

6

When your story is posted on The Knowledge Loom, use it to advertise and celebrate your successful school improvement efforts!

Activity Organizer 5.2 continued

Results:

Over time, note things like changes in test scores and changes in student or faculty attitudes and practices. Record success measures (evidence) that your action plan is moving forward. You will want to note both qualitative and quantitative changes. Test scores are not the only measure of success. Anecdotes add story value and are good illustrations for others.

Replication Details:

As you work with your improvement plan, keep a running list of things you implemented, what worked, and what needed adjustment. Think of this as a journal that documents your path toward improvement. These notes will serve as tips for others who might try to adapt what you did to their own situations.

Contact Information:

Name, address, phone, e-mail of a person at your site who could talk to others about this success.

THE STORY

Once you have listed all the facts about your success, use this information to write a short summary and a feature story about your success. A helpful story-writing guide and story samples can be accessed online at <http://www.lab.brown.edu/bpo/psguide/writingguide.html> Scroll to bottom of page and click on "Writing Guide Appendix E."

Short Summary:

A list of bullets (3-5 that clue the reader in to the main points about your story) and a 150-word overview that tells people the real turn-around story or the essence of your success model.

Feature Story:

A 500- to 750-word narrative that expands on the summary, reads like a magazine article feature, relates the story of your success, and will inspire others.

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Step 5—Activity 3

Developing a Personal Action Plan

GOAL

Develop a personal action plan to support your team’s action plan and long-term goals.

MATERIALS

Completed copy of Activity Organizer 5.1—Create an Action Plan
Activity Organizer 5.4—Personal Action Planning

DURATION

30 minutes

RATIONALE

An action plan usually outlines organizational milestones and action items, but waiting for others to make them happen, while continuing your status quo, day-to-day routines, does not accelerate successful change. Individuals and their deliberate commitment to change will support the successful implementation of the plan most efficiently.

Activity Organizer 5.4–Personal Action Planning

Extension: Reflection

Personal action items that support your organization's action plan:

2

Sample

Directions: Step 5–Activity 3

1

Review the action plan recorded on Activity Organizer 5.1 and think about personal milestones and action items to which you can commit that will support the achievement of the action plan.

2

List these personal action items on Activity Organizer 5.4. These might be additional milestones and corresponding action items that correlate with organizational milestones stated on the plan, or they might be action items that lend personal support to each milestone already stated on the plan.

3

Consider selecting a trusted colleague with whom to share personal milestones and action items. Offer opinions, support, and clarifications to one another.

4

Each week, thoughtfully review the list you have created and make notes about your progress. We suggest that you get a notebook in which to date and record these weekly reflections, noting questions such as: “Have I actively incorporated my action items into this week’s activities? What changes have I noticed in myself, my colleagues, my students? Are there other action items I should be attending to? How is our organization/team progressing as a whole? Are there conversations we need to have about our action plan?” It is very helpful to document progress and use it to both adjust old action items and plan new ones.

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Notes for Facilitators

- Step 5—Activity 1 is designed to help participants create a list of things they can do today to begin, or continue, implementing best practices locally. The three levels of the activity organizer help them see how immediate to-do items can be tied to long-term goals. It is important to emphasize that long-term goals can be broken down into smaller, more manageable projects.
- Revisiting Knowledge Loom success stories can really help participants identify those actions that they should be taking. It is important, though, that participants understand that their path to school improvement is not going to look exactly like another school's or district's. Rather than just laying out a plan based on actions taken by the success-story group, participants should think carefully about local issues including time schedules, personnel, and other resources. Adaptations of another's success should be planned with these local particulars in mind.
- Sharing copies of The Knowledge Loom success stories that influenced the development of the action plan is an effective way to establish scenarios that can concretely define the improvement process and help set expectations for realistic results. Devising ways to share these success stories and discuss scenarios—what will it look like when it is working—can add an effective dimension to the school improvement process.
- Consider having participants complete the extension activity while you are working with them face-to-face. Sharing personal action items with colleagues can inspire new ways of thinking about the work and each other. It also provides an opportunity for establishing mentorships and support-relationships among colleagues.
- Strongly encourage participants to develop a plan for the ongoing documentation of their improvement work that will result in a success story that can be shared on The Knowledge Loom. The notion of collaborative inquiry, upon which this Guidebook is built, is not restricted to face-to-face interactions. Persuade educators to feel a responsibility, as professionals, for contributing to the knowledge base about what works in teaching and learning, and sharing this with colleagues worldwide. The Knowledge Loom provides an effective venue for this level of sharing. As a professional development facilitator, you can play an important role in helping to establish a new paradigm for collegial sharing that reaches beyond one classroom, one school, or one local community.

Step 5: Activity Organizers

Activity Organizer 5.1 – Create an Action Plan

| Long-Term Goals | Short-Term Goals or Milestones | Action Items |
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Activity Organizer 5.1—Create an Action Plan

When this activity organizer is complete, you will have a list of steps and actions to take toward reaching your long-term goals.

Begin by jotting your long-term goals in the first column. Discuss and define two or three big steps toward achieving each long-term goal; write these short-term goals in the middle column. Create your to-do list in the Action Items column.

| Long-Term Goals | Short-Term Goals or Milestones | Action Items |
|--|---|--|
| <i>Get teachers involved in analyzing student data and using analyses as a basis for setting their own professional development plans.</i> | <i>Improve technology tools and procedures for collecting and sharing student data.</i> | <i>Talk to Director of Tech. Test new student info system. Find out about intranet.</i> |
| | <i>Restructure school schedule to allow for team data analysis meetings.</i> | <i>Talk to scheduling committee. Develop a prototype schedule. Investigate funds for release time.</i> |
| | <i>Establish submission and review procedure for professional development plans.</i> | |
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| <i>Make collaborative problem-solving the basis of all professional development offered in the district.</i> | | |
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Activity Organizer 5.2—Our Organization's Success Story

When you complete this activity organizer, you will have:

- A record of where you started your improvement process and why,
- A record of the steps toward realizing your goals, and
- A record of results related to your efforts.

On separate paper, record information about each of the fields noted in bold on this template for documenting a Knowledge Loom success story. You will write lists of facts, followed by a narrative (The Facts and The Story). Record the facts over time. Write your story summary and narrative after all the facts have been recorded. E-mail your completed story (or questions about the development of your story) to loom@lab.brown.edu.

THE FACTS

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Selected Spotlight Title:

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Selected Best Practice(s):

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Best practice #1:

Best practice #2:

Name of School:

City, State:

Grade Levels:

Setting: (urban, suburban, rural)

Type: (public, private)

Demographics:

What is the size of your staff and student population? Are there other distinguishing characteristics such as free and reduced lunch, number of native languages spoken, special-needs population, transient population, etc.

Background and Context:

What is currently going on at your site that prompted you to focus on the best practice(s) you chose to integrate into your work? In a sense, this is your problem statement. And, your action plan is your long-term solution.

Design and Implementation:

How did you/will you implement the best practice(s)? What systems will be put in place? Including a copy of your action plan in this section is helpful.

Activity Organizer 5.2 continued

Results:

Over time, note things like changes in test scores and changes in student or faculty attitudes and practices. Record success measures (evidence) that your action plan is moving forward. You will want to note both qualitative and quantitative changes. Test scores are not the only measure of success. Anecdotes add story value and are good illustrations for others.

Replication Details:

As you work with your improvement plan, keep a running list of things you implemented, what worked, and what needed adjustment. Think of this as a journal that documents your path toward improvement. These notes will serve as tips for others who might try to adapt what you did to their own situations.

Contact Information:

Name, address, phone, e-mail of a person at your site who could talk to others about this success.

THE STORY

Once you have listed all the facts about your success, use this information to write a short summary and a feature story about your success. A helpful story-writing guide and story samples can be accessed online at <http://www.lab.brown.edu/bpo/psguide/writingguide.html>
Scroll to bottom of page and click on "Writing Guide Appendix E."

Short Summary:

A list of bullets (3-5 that clue the reader in to the main points about your story) and a 150-word overview that tells people the real turn-around story or the essence of your success model.

Feature Story:

A 500- to 750-word narrative that expands on the summary, reads like a magazine article feature, relates the story of your success, and will inspire others.

Activity Organizer 5.3–Disseminating Your Action Plan

If you have been using the Guidebook prior to completing this activity, you know that a good way to engage with Knowledge Loom content is to share your thoughts and ideas about it with local colleagues, members of the broader education community, and members of The Knowledge Loom online community. Now that you have created an organizational action plan with long-term goals, milestones, and action items, list ways you can disseminate this plan, get feedback, and garner buy-in from all stakeholders.

Extension: Broadening the Conversation

Action plan dissemination and ongoing communication ideas:

Note: If you have not already done so, take The Knowledge Loom tour to get better acquainted with what the site offers. Click the "TOUR" button located on the home page at:

<http://knowledgeloom.org>

Activity Organizer 5.4–Personal Action Planning

Extension: Reflection

Personal action items that support your organization's action plan:

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<http://knowledgeloom.org>