School Psychology: Creating Our Future(s)
Action Planning Handbook

**Advocacy in School Psychology**

The Futures of School Psychology

- Conduct Needs Assessment
- Define Vision & Goals
- Identify Strengths & Challenges
- Define Action Items
- Generate Concrete Outcomes
- Plan Evidence-based Strategies
- Implement Action Plan
- Evaluate Effectiveness

Online Webinar (Keynote, Featured, Panel Presenters)
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Introduction

Welcome to the Action Planning Handbook for the 2012 School Psychology Futures Conference. The Futures Planning Committee has engaged in intensive planning that has culminated in three online conference sessions: Leadership, Critical Skills, and Advocacy. We believe the activities in this handbook will guide you in planning your local, state/provincial, national, and/or international goals for the profession of school psychology. Together, our work will better prepare the field of school psychology to address critical issues that face children, families, and schools in the 21st century.

We have a lot to accomplish. Regardless of whether you are a graduate student in training or are a school psychologist or faculty member at the early, mid, or well-seasoned stage of your career, you will wrestle with pivotal questions facing our specialty. We have high hopes for the 2012 Futures Conference. It is a working conference, including significant background preparation, challenging discussions, critical analysis, consensus building, and an on-going effort to plan for implementing strategic actions and monitoring progress toward our goals.

This handbook was designed for all conference participants. It will walk you through a process to plan your actions based on the three main themes of this conference: leadership, critical skills, and advocacy. The overall tasks for action planning will encompass: reviewing a needs assessment for our profession; identifying strengths, challenges, opportunities, and resources; and planning next steps to reach each theme’s goals as they apply to your context (local, state/provincial, national, international).

Use the following resources for more information about the 2012 Futures Conference and historical information about the 2002 Futures Conference:

- Information and history: http://www.indiana.edu/~futures/f12_info.html
- Values and Assumptions: http://www.indiana.edu/~futures/f12_values.html

Again, welcome to the conference. You have an important task ahead of you and we appreciate your dedication and effort to better the future of our field and the lives of children.

Themes & Goals

The conference is one part of a comprehensive process to analyze our profession and plan strategies for the future. The overall goals include:

- Define leadership, critical skills, and advocacy by and for school psychologists.
- Identify local, state/provincial, national, and/or international strengths that will promote development of leadership, critical skills, and advocacy by and for school psychologists.
- Identify local, state/provincial, national, and/or international challenges that will inhibit development of leadership, critical skills, and advocacy by and for school psychologists.
- Identify resources in existing structures (e.g., professional organizations, local and state/provincial education agencies, research, graduate programs) that will support leadership, critical skills, and advocacy by and for school psychologists.
- Identify systems-level and individual opportunities to research, promote, and demonstrate leadership, critical skills, and advocacy by and for school psychologists.
Purpose and Use of the Handbook
This handbook was designed to provide each conference participant with a framework to participate in the conference meaningfully. It provides relevant background information to foster understanding of conference goals and worksheets to guide participants’ discussions during the conference and afterwards to develop action plans whatever your local situation may be.

The actual conference presentations will provide unique perspectives from keynote speakers outside of our field, applications from featured speakers within our field, and implementation strategies from panel presenters who are practitioners.

To get the most out of the conference presentations, individuals and groups will need to review the activities in this handbook before conference sessions; listen to conference speakers; and then complete the activities in this handbook as a follow-up to the conference sessions and as a pathway toward improvement of our profession. Access to the Futures website is also essential because it will be used as a hub for important resources.

Background Readings
Contributing to the future of school psychology requires general and specific information about each conference theme. To facilitate knowledge acquisition for participants, the Futures Planning Committee has compiled background readings for the conference. The reading references are available on the Futures Conference website at the following locations:

- Leadership: http://www.indiana.edu/~futures/f12_leadership.html?tab=3

Participants: Groups and Individuals
Groups of participants and individuals will collaborate on local, state/provincial, national, and/or international action plans.

Groups at Local, State/Provincial, National, and/or International Level
The overarching goal of groups is to promote collaborations that result in improved outcomes for children, families, schools, and communities. This handbook was designed to facilitate the planning process.

If your group has not yet registered for the conference, please take a moment to let us know your group will be attending by registering on the Futures Conference website: http://www.indiana.edu/~futures/registration.html. This site also contains detailed information on the logistics of hosting a Futures Conference website.

Individuals
We also hope that individual school psychologists, graduate students, faculty, and others view the live or archived conference webinars (from their work or home laptops, desktops, or mobile devices) and complete the activities in this handbook.
If you have not yet registered for the conference, please take a moment to let us know you will be attending by registering on the Futures Conference website: http://www.indiana.edu/~futures/registration.html

**Group Processes**

Many of the participants in the 2012 Futures Conference will be working in groups and collaborating on the creation of action plans for the future of school psychology. Working within a team presents its own challenges and can be a struggle for novice and seasoned team members alike.

The Futures Planning Committee is providing the following resources to support effective teaming and successful group processing:

- George Mason University’s *Process Improvement*: http://gunston.doit.gmu.edu/708/teamwork.asp
- Clemson University’s *Successful Strategies for Teams*: http://www.clemson.edu/OTEI/documents/teamwork-handbook.pdf
- University of Colorado Denver – Effective Collaborative Leadership and Teaming Strategies: http://csefel.vanderbilt.edu/ppt/effective_collaboration_voiceover.ppt

**Evidence-based Practice**

The Futures Conference Planning Committee advocates for the selection and implementation of effective, evidence-based practices when developing action plans. Consider the following resources when selecting programs, strategies, interventions to implement your action plan:

Futures Development Model

The Futures Development Model, defined by the Futures Conference Planning Committee, is a series of problem-solving stages that will guide participants through a process of action planning. All participants are invited to engage in this process. The action planning activities in this handbook are to supplement the online conference to support and promote sustainable change locally, statewide, nationally, internationally, and professionally.

To achieve this goal, a The Futures Conference Planning Committee will facilitate the creation of a Futures Development Team after the conference sessions are complete. The purpose of this Futures Development Team will be to lead the on-going effort for sustainable change in our profession including dissemination of information to relevant constituents. The Futures Development Team will consist of one member from each School Psychology Roundtable membership organization. There will be three Futures Development Teams: Leadership, Critical Skills, and Advocacy. The teams will be charged with creating action plans for the profession of school psychology and responsible for monitoring implementation. Selection of members for the Futures Development Team will be facilitated by the eight member organizations of the School Psychology Roundtable. If you are interested in participating, contact the director or president of your organization.

Creating the Action Plan for Our Profession

We will look to you to submit your action items to the Futures Development Team via the Futures Conference website. The team will consider all action item submissions to define the action plan for the future of our profession. The Futures Development Teams will also be responsible for implementation and evaluation of action items within the plan.

Local, state/provincial, national, and international action items will populate the action plan for our profession.
# Futures Development Model Stages

The Futures Development Model can be broken down into these familiar stages:

<table>
<thead>
<tr>
<th>Stages of the Futures Development Model</th>
<th>Futures Conference Planning Committee Tasks</th>
<th>Participant Tasks</th>
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</thead>
</table>
- Review needs assessment, and  
- Update for local context. |
| 2. Understand the vision and goals for our future. | Completed pre-conference: used needs assessment data to define themes, vision, and goals. | Through Activity 2 (Page 8):  
- Review vision and goals, and  
- Update for local context. |
| 3. Identify contextual strengths, challenges, opportunities, and resources. | Completed pre-conference: identified national/international strengths, challenges, opportunities, and resources. | Through Activity 3 (Page 13):  
- Identify strengths,  
- Identify challenges,  
- Identify existing opportunities and resources, and  
- Identify pathways for research and promotion. |
| 4. Define goal-oriented action items. | | Through Activity 4 (Page 17):  
- Define action items. |
| 5. Generate concrete outcomes for the action items. | | Through Activity 4 (Page 17):  
- Determine concrete outcomes for action items. |
- Plan to use evidence-based strategies for each action item, and  
- Combine action items into an action plan. |
- Plan implementation. |
- Plan evaluation strategies and tasks. |
Activity 1: Viewing the Online Webinar

Purpose of this Activity
The purpose of this activity is to register, prepare for, and view the online conference webinar for Advocacy.

Data & Sources for this Activity
There are no data or sources for this activity.

Expected Outcome of this Activity
View successfully the online live or archived webinar for Advocacy.

Notes for Facilitators & Group Sites
If you are a facilitator or a participant at a group site, you will want to consider the following guidelines:
• If a group site contains participants from differing contexts (e.g., districts, schools, organizations), participants from the same context need to work together to complete the activities in this workbook.
• The activities in this handbook are designed to be completed after the conclusion of the 90-minute webinar.
Activity Steps

Step 1: Register for the Conference Webinar

Register for the conference webinar as an individual or as a group.

- Individual registration: http://www.indiana.edu/~futures/forms/singlereg.html
- Group registration: http://www.indiana.edu/~futures/forms/groupreg.html
- Consider important registration information for group sites: http://www.indiana.edu/~futures/futures2012_files/futures2012_reg_info.pdf

Step 2: Prepare Your Technology for the Live Conference Webinar

The Futures Conference is occurring online through Adobe Connect meeting software hosted by Indiana University. Joining this conference using your laptop, computer, or mobile device is easy - with a little preparation. The following resources can help you prepare to join the live sessions (the archived sessions will not require this preparation):

- Instructions for testing your technology and joining the live Futures Adobe Connect Meeting: http://www.indiana.edu/~futures/futures2012_files/instructions.pdf
- ONLINE VIDEO to accompany instructions above: http://www.indiana.edu/~video/stream/launchflash.html?format=mp4&folder=edvideo&filename=ic/cummings/get_your_computer_ready3.mp4
- If after using these instructions and watching the online video you require assistance, please contact or IT department or futuresconference2012@gmail.com for further assistance.

Step 3: View The Live or Archived Webinar

The Advocacy live webinar will begin on November 10, 2012 at 3:30pm Eastern.

- Join the live webinar: http://connect.iu.edu/futures
- Note: when joining the live Futures Adobe Connect meeting, please login 5-10 minutes early so you have time to resolve any technical glitches and become comfortable with the Adobe Connect software. The Futures sessions will begin promptly at 3:30pm Eastern.

To view the archived webinar, access to Advocacy web page.

- View the archived webinar: http://www.indiana.edu/~futures/f12_advocacy.html?tab=2

Step 4: Develop Your Action Plan

Using information from the webinar presentation, develop the action plan for your local context by moving on to Activity 2.
Activity 2: Needs Assessment for Advocacy

Purpose of this Activity
During 2011-2012, the Futures Conference Planning committee used multiple data collection methods to identify major needs and issues at the national and international levels. The purpose of the national and international needs assessment was to gather feedback from members of our profession about what our field needs to better support children’s success.

The goal of this activity is to have conference participants review the needs assessment compiled by the Futures Planning Committee for the Advocacy theme and add and prioritize needs and issues for the local context.

Data & Sources for this Activity
The raw data sources include: focus group feedback, survey responses, and online collaborative discussion posts. The raw data are archived on the Futures Conference website at the following location:


Based on the national/international needs assessment, the Futures Conference Planning Committee defined the vision of the Advocacy theme and determined specific goals to explore and achieve. The vision and goals are listed on Futures Conference website at the following location:


Expected Outcome of this Activity
Understand our shared vision and goals for advocacy based on an assessment of our needs for the future of school psychology.

Notes for Facilitators & Group Sites
If you are a facilitator or a participant at a group site, you will want to consider the following guidelines:

- If a group site contains participants from differing contexts (e.g., districts, schools, organizations), participants from the same context need to work together to complete the activities in this workbook.
- The activities in this handbook are designed to be completed after the conclusion of the 90-minute webinar.
**Activity Steps**

**Step 1: Review Theme Description**

The Futures Planning Committee developed the following theme description based on focus group and survey data.

Advocacy is a critical skill to influence and create change for the future of our nation’s children. All too often, advocacy may be interpreted as self-promotion and our profession may not be as active and vocal as other professions. School psychology and school psychologists need to further develop effective advocacy strategies to support our children and youth, to enhance the profession, and to incorporate evidence-based assessment and treatment in schools. The presentation will focus on:

- How do we advocate and promote healthy schools and classroom climates?
- What is educational advocacy and what tools are needed to promote the effective education of all children?
- How do we advocate for the profession of school psychology?
- How do we educate for advocacy on both the university and practitioner level?
- How do you support, advocate for, and implement evidence-based practices?
- What are some examples of effective advocacy at the local level?

**Step 2: Add To or Refine Theme Description**

Add to or refine the list above to reflect advocacy efforts that apply to your context (local, state/provincial, national, and/or international). (If needed, you may conduct a needs assessment for advocacy within your context that may better reflect needed advocacy efforts listed in Step 1.) Also, consider advocacy efforts needed at each level: local, state/provincial, national, and/or international.

*Example A. Advocate for district’s social-emotional learning curricula.*

*Example B. Advocate for statewide support for clinical supervision.*

1. 

2. 

3. 

4. 

5. 
**Step 3: Prioritize Needs**

Consider the lists developed in Steps 1 and 2 above; prioritize them for your context. You will use this list in Activity 4 when planning how to achieve your goals.

1. 

2. 

3. 

4. 

5. 

Activity 3: Strengths, Challenges, Resources, and Opportunities

Purpose of this Activity
The purpose of this activity is to consider strengths, challenges, resources, and opportunities in your context. Strengths may help to support and promote advocacy while challenges may act as barriers to your efforts. Resources and opportunities may provide tools and strategies to achieve your goals. The main objective in identifying resources and opportunities is to avoid reinventing the wheel – programs and interventions needed to reach your goals may already exist and be proven effective.

Through this activity, participants will generate lists of strengths, challenges, resources, and opportunities for consideration during action planning. The Futures Conference Planning Committee has generated a list of existing national/international resources. Participants will review this list and add resources available in their context.

Data & Sources for this Activity
The list of national/international existing resources for the Advocacy theme is archived on the Futures Conference website at the following location:


Expected Outcomes of this Activity
- A list of contextual strengths that will promote advocacy
- A list of contextual challenges that will inhibit advocacy
- A list of contextual resources within existing structures
- A list of contextual opportunities to research, promote, and demonstrate advocacy efforts

Notes for Facilitators & Group Sites
If you are a facilitator or a participant at a group site, you will want to consider the following guidelines:

- If a group site contains participants from differing contexts (e.g., districts, schools, organizations), participants from the same context need to work together to complete the activities in this workbook.
- The activities in this handbook are designed to be completed after the conclusion of the 90-minute webinar.
Activity Steps

**Step 1: Review Theme Goals**

The Futures Planning Committee developed the following theme goals based on focus group and survey data.

The broad conference goals to create our future for advocacy by and for school psychologists include:

a. Define advocacy by and for school psychologists.
b. Identify local, state/provincial, national, and/or international strengths that will promote advocacy by and for school psychologists.
c. Identify local, state/provincial, national, and/or international challenges that will inhibit advocacy by and for school psychologists.
d. Identify resources in existing structures (e.g. professional organizations, local and state/provincial education agencies, research, graduate programs) that will support advocacy by and for school psychologists.
e. Identify systems-level and individual opportunities to research, promote, and demonstrate advocacy by and for school psychologists.

In this activity, we will focus on parts (b), (c), (d), and (e). Part (a) was completed in Activity 2: Needs Assessment for Advocacy.

**Step 2: Identify Strengths**

Identify strengths in your context (local, state/provincial, national, and/or international) that will promote advocacy.

*Example A. Strong professional development in advocacy skills.*

*Example B. Open and available pathways to promote school psychology.*

1. 

2. 

3. 

4. 

5. 
**Step 3: Identify Challenges**

Identify challenges in your context (local, state/provincial, national, and/or international) that will inhibit advocacy.

*Example A. Lack of funding to implement results of advocacy efforts.*

*Example B. Lack of competency in advocacy in general.*

1. 

2. 

3. 

4. 

5. 

For the following activities, you will identify opportunities and resources in existing structures that will support you in achieving your action plan outcomes. It is important to consider the strengths and challenges in your context when identifying these opportunities and resources.

**Step 4: Review Existing Resources**

Review the list of identified national/international resources, developed by the Futures Conference Planning Committee, which may support advocacy:

- National/International Resources: 

**Step 5: Identify Resources**

Now, identify resources in existing structures (e.g., professional organizations, local and state/provincial education agencies, graduate programs) that will support advocacy by and for school psychologists.

*Example. Local, state/provincial, and/or national professional learning communities.*

1. 

2. 

3. 

4. 

5. 
**Step 6: Identify Opportunities**

Lastly, identify systems-level and individual opportunities to research, promote, and demonstrate advocacy by and for school psychologists.

*Example A. Dr. Smith from the university has mentioned he wants to support advocacy in our school.*

*Example B. We could offer advocacy seminars for our entire district/state.*

1. 

2. 

3. 

4. 

5. 

**Step 7: Submit Your Strengths, Challenges, Resources, and Opportunities**

Submit your lists to the Futures Development Team by filling out the submission form on the Futures Conference website:

- [http://www.indiana.edu/~futures/forms/resources.html](http://www.indiana.edu/~futures/forms/resources.html)
Activity 4: Action Planning

Purpose of this Activity
The purpose of this activity is to determine action items for the goals you prioritized in Activity 2 and plan evidence-based action strategies to achieve your desired outcomes.

Data & Sources for this Activity
Consider the background readings; theme vision and goals; and identified strengths/challenges/opportunities/resources (from Activity 3) for this activity. Information for the Advocacy theme is archived on the Futures Conference website at the following location:

Expected Outcome of this Activity
- A viable action plan.

Notes for Facilitators & Group Sites
If you are a facilitator or a participant at a group site, you will want to consider the following guidelines:
- If a group site contains participants from differing contexts (e.g., districts, schools, organizations), participants from the same context need to work together to complete the activities in this workbook.
- The activities in this handbook are designed to be completed after the conclusion of the 90-minute webinar.
Activity Steps

**Step 1: Select Goal**

Select one goal (from Activity 2, Step 3) to begin the action planning process. Write the goal below:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

**Step 2: Develop Action Items**

First, brainstorm evidence-based strategies* that may achieve the goal listed in Step 1 above. Next, revise strategies so they are actionable (i.e., *concrete, measurable, and feasible*) and empirically supported*. ("If needed, review Evidence-Based Practice in the Introduction).

Example. An administration-focused campaign to promote school-based mental health.

1. ______________________________________________________________________

2. ______________________________________________________________________

3. ______________________________________________________________________

4. ______________________________________________________________________

5. ______________________________________________________________________

**Step 3: Prioritize Action Items**

Select up to three action items from Step 2 above and list them here:

1. ______________________________________________________________________

2. ______________________________________________________________________

3. ______________________________________________________________________
**Step 4: Create Action Plan**

For this step: (1) re-list the needed action items; (2) identify responsible party; (3) define timeframe for completion; (4) indicate the major activities (action steps) of each action item; and (5) define outcomes that indicate progress.

<table>
<thead>
<tr>
<th>Action Item (1)</th>
<th>Responsible Party &amp; Timeframe (2) &amp; (3)</th>
<th>Major Activities, Action Steps (concrete, measurable, and feasible) (4)</th>
<th>Progress Indicator, Outcomes (concrete, measurable, and feasible) (5)</th>
</tr>
</thead>
<tbody>
<tr>
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<td>3.</td>
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</tbody>
</table>

**Step 5: Submit Action Items**

The Futures Development Team will compile action items into the action plan for our profession. Submission form:

- [http://www.indiana.edu/~futures/forms/action_items.html](http://www.indiana.edu/~futures/forms/action_items.html)

**Step 6: Repeat**

Return to Step 1 of this activity to develop action items for additional goals. Use the action plan template in *Appendix One* to compile all action items created in Steps 1 – 5 into a comprehensive action plan.
Activity 5: Implementation & Evaluation

Purpose of this Activity
The purpose of this activity is to support implementation and on-going evaluation of outcomes.

Data & Sources for this Activity
Consider the background readings; theme vision and goals; identified strengths/challenges/opportunities/resources (from Activity 3); and action plan (from Activity 4) for this activity. Information for the Advocacy theme is archived on the Futures Conference website at the following location:

- Background Readings: http://www.indiana.edu/~futures/f12_advocacy.html?tab=3
- Vision and Goals: http://www.indiana.edu/~futures/f12_advocacy.html?tab=1

Expected Outcome of this Activity
Updated action plan that includes evaluation and monitoring activities.

Notes for Facilitators & Group Sites
If you are a facilitator or a participant at a group site, you will want to consider the following guidelines:

- If a group site contains participants from differing contexts (e.g., districts, schools, organizations), participants from the same context need to work together to complete the activities in this workbook.
- The activities in this handbook are designed to be completed after the conclusion of the 90-minute webinar.
Activity Steps

Your task is to implement your action plan to achieve your goals. Start right away. You may have ten years, but change is slow so do not wait!

Step 1: Determine First Steps

What will you do now to get your action plan in gear?
- Do you need to create a task force to drive the change process?
- Do you need to gain administrative support?
- Consider the Leadership conference session and handbook for strategies to lead change.
- Also, consider the Critical Skills conference session and handbook for strategies to prepare school psychologists for change.

Step 2: Plan First Steps

List the steps you need to take to achieve your goals:

1. 

2. 

3. 

Step 3: Publish

We request that you report publicly about your progress in completing the items in your action plan. Review your action plan and ensure you have the following action items incorporated into your plan:
- Publish yearly reports on action plan progress (examples: articles in association newsletters, district reports, School Psychology Quarterly, or Communiqué).
- Publish a comprehensive report at the five-year mark.
- Consider holding a local, state/provincial, national, and/or international mini-conference at the five-year mark to report on progress, gather feedback, and adjust goals for the next 5 years.
- Publish a final ten-year report in leading professional publications.

The Futures Development Team will report to the profession on the progress of the action plan for the future of school psychology. This reporting will occur each year; at the five-year mark with an update and mini-conference for each theme; and at the ten-year mark with a final report.

Step 4: Monitor Progress

When completing yearly progress reports, reflect on the effectiveness of the action plan strategies for achieving outcomes. Adjust as needed.

In addition, and most importantly, reflect on the action plan itself for its effectiveness in reaching your overall goals. Adjust as needed.
## Appendix One

An electronic version of this template is available at: [http://www.indiana.edu/~futures/f12_advocacy.html?tab=4](http://www.indiana.edu/~futures/f12_advocacy.html?tab=4)

**Goal 1:**

<table>
<thead>
<tr>
<th>Implementation</th>
<th>Evaluation</th>
<th>Status (Not started, In Progress, Completed)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Item</td>
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<td>Major Activities, Action Steps (concrete, measurable, and feasible)</td>
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**Goal 2:**

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<tbody>
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<td>Responsible Party &amp; Timeframe</td>
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**Goal 4:**

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<th>Evaluation</th>
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<tr>
<td>Action Item</td>
<td>Responsible Party &amp; Timeframe</td>
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<th>Implementation</th>
<th>Evaluation</th>
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<tbody>
<tr>
<td>Action Item</td>
<td>Responsible Party &amp; Timeframe</td>
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### Goal 6:

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<tr>
<th>Implementation</th>
<th>Evaluation</th>
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</thead>
<tbody>
<tr>
<td>Action Item</td>
<td>Responsible Party &amp; Timeframe</td>
</tr>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
</tr>
</tbody>
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