



Planning Guide

For use by ACT Staff and
State Organization Leaders

Introduction

This **Planning Guide for ACT State Organizations** has been prepared by ACT for the purpose of supporting the State Organization and ACT collaborative planning process.

Planning is an important activity for any organization and certainly one that is an essential element of ACT's success. A thoughtful and collaborative State Organization planning process provides several benefits to the states. First and foremost, the planning process provides the basis for a State Organization to develop strategies that address the educational needs and issues confronting the state. In addition, the planning process:

- Increases the likelihood of achieving the desired outcomes
- Provides the State Organization with a tool for self-evaluation and accountability
- Establishes direction independent of the continuity in State Organization leadership
- Provides the State Organization with the opportunity to draw on the expertise and capabilities of ACT staff across the organization
- Leverages State Organization and ACT resources to target the highest priorities in the state to achieve the best results

Because effective planning is dynamic in nature, the planning process within each State Organization is also dynamic. This guide was not prepared to direct or control the State Organization planning process. Rather, it was designed to be a tool that assists the State Representative and the Officers of the State Organization to (1) understand the planning process at ACT and (2) recommend an approach to planning that will meet the needs of state constituencies.

The Planning Process at ACT

The Corporation

The ACT Board of Directors establishes the vision, values, strategic direction, mission, and goals for a fiscal year. For fiscal year 2014 (September 1, 2013, through August 31, 2014), the following vision, values, strategic direction, mission, and goals were established:

Our Vision: To be the leading source for information and innovative solutions that advance individuals throughout their lifetimes

This vision emphasizes:

- Providing information rather than just data
- Helping people advance throughout their lives rather than at a few discrete points in their education and careers
- Offering innovative solutions

Our Values:

- Excellence
- Diversity
- Leadership
- Empowerment
- Learning
- Sustainability

Strategic Directions:

- Put people first
- Customer-centric
- Empowered employees
- Foster a culture of innovation
- Utilize advanced technology and social media solutions
- Continuously improve

Our Mission:

Helping people achieve education and workplace success

Strategic Goals:

1. **Product Continuum**—Build and deliver highly credible, connected solutions that support individuals from K through Career.
2. **Customer**—Create and engage an active and diverse community of customers and stakeholders.
3. **Assessment and Analytics**—Deliver robust and easy-to-use assessment development, data analytics, and reporting capabilities.
4. **Leadership**—Shape and influence our environment with thought-leading policy, research, advocacy, and strategic engagement.

Office of State Organizations Goals

The Office of State Organizations also engages in the planning process that yields direction and support for the goals and strategies identified by each state's organization.

The Planning Timeline

The annual planning and budgeting cycle at ACT generally begins shortly after the first of the year with the corporate goals established by the ACT Board of Directors and senior management. Once these goals are finalized, they are cascaded to all business areas of ACT for development of area goals.

The timing and sequence of the corporate planning process suggests that the planning cycle for the State Organizations should take place in the late spring/early summer (most likely May, June, and July). Engaging in the planning process at this time:

- Creates the optimum window for aligning state needs with ACT's Strategic Goals and Initiatives
- Dovetails with the calendar of the institutional and organizational representatives serving on the Council of the State Organization
- Permits finalization of the State Organization plan prior to the academic year in which it will be implemented

It should be noted that the above recommendation does not preclude the State Organization Executive Committees and/or Councils from discussing their needs and priorities in advance of this timeline.

The Planning Process for State Organizations

The following model is offered as a starting point for effective State Organization planning. In addition, a set of suggested planning forms are included at the back of this guide and may be useful in the planning process.

Step 1: Determine the Planning Team and Create a Planning Calendar

The State Representative is responsible for leading the State Organization planning process. It is urged that the planning team include, at a minimum, the members of the Executive Committee and the ACT State Lead. The Executive Committee may add members to the planning team and, in some instances, the entire Council might constitute the planning team. The planning team may also want to engage others within the state as consultants to the process. It is important that the planning team be a manageable, working group representative of educational constituencies in the state.

The timeline for the planning team should be established at the outset to ensure maximum participation of planning team members. As stated above, the timeline established by the State Organization should consider the ACT corporate planning calendar.

The planning process should result in a calendar that lists specific dates of activities and events (see page 10).

Step 2: Conduct a State Environmental Scan

The environmental scan for the state identifies the pressing educational issues in the state. Many of these issues could be identified as priorities by state policy leadership. This step should include the identification of appropriate documents authored by state agencies or others as well as pertinent pending legislation. Still other issues could be those of import to the State Organization.

ACT staff will provide in advance of this session a record of ACT program use in the state and a list of pertinent state objectives for the coming year.

It is recommended that this step involve as broad an audience as possible. Ideally, the environmental scanning process will include the input of Council membership. This step may be accomplished in connection with a regularly scheduled meeting of the Council, via a webcast involving Council members, or through a structured survey of the Council membership.

It may also be possible to draw institutional/organizational members of the State Organization into the scanning process through surveys, focus groups, or discussions held at state conferences.

The scanning process will most likely require the planning team to synthesize and summarize the ideas generated.

The environmental scan should result in a list of the educational issues confronting the state. (see page 11).

Step 3: Prioritize State Educational Issues

After all pressing educational issues are identified, the list should be prioritized from highest to lowest. As with the environmental scan, the planning team should seek input on priorities from as broad an audience as is feasible. Prioritization of the issues should involve, at a minimum, all members of the Council membership and should be accomplished during a regularly scheduled or special Council meeting.

This step should result in a prioritized (from highest to lowest) list of the state's critical educational issues (see page 12).

Step 4: Align State Priorities with ACT's Strategic Goals and Initiatives

Each issue on the prioritized list of state educational issues should be reviewed for fit with ACT's Strategic Goals and Initiatives.

Several of the issues will align directly with ACT programs and services. An example of direct alignment would be increasing the college readiness of students in urban environments.

While other issues may align indirectly with ACT programs and services, those issues may be included in the educational priorities if those priorities also include those in direct alignment with programs and services. An example of indirect alignment would be increasing the number of qualified teachers in the state.

This step should result in a list of those state educational priorities that align with ACT programs and services (see page 13).

Step 5: Prioritize the Subset of Issues

The planning team, the Council, or the Executive Committee should prioritize, from most important to least important, the subset of state issues that align with ACT programs and services. Because the resources of the State Organization are finite, it may be necessary to focus the planning effort on the top priorities.

This step should result in a manageable number of issues that will be addressed in the state's plan (see page 14).

Step 6: Develop State Organization Objectives

Determination of the objectives may be accomplished by the State Organization's planning team, the Council, or the Executive Committee.

State Organization objectives should be designed to address the subset of priorities identified in step 5 above. A limited number of objectives should be formulated for each priority. It is recommended that no more than five objectives be established, and it is possible that one objective may be sufficient to address a particular priority.

Objectives translate priorities into actionable statements. When developing State Organization planning objectives, members of the planning team should consider the following characteristics of a quality objective:

- The objective should be **specific**. Does the objective clearly and concisely state what is to be accomplished?
- The objective should be **meaningful**. If accomplished, will the objective have an impact on the issue?
- The objective should be **achievable**. Is it realistic to assume that the State Organization can accomplish the objective?
- The objective should be **measurable**. There are two pivotal questions in determining if an objective is measurable.
 - The first question is what criteria will be used to determine success? How will you know that the State Organization has accomplished the objective?
 - The second question is how long will it take to achieve measurable results? On this second question, an objective may have a time horizon for its accomplishment of longer than a year but should not exceed three years. Multiple-year objectives should include a set of action steps with annual benchmarks that measure progress toward the objective.

This step should result in the identification of objectives that address the State Organization's priorities (see page 15).

Step 7: Define Action Steps to Accomplish the Objective(s)

Action steps are at the core of a sound State Organization plan. Action steps clearly delineate the activities necessary to accomplish the objective(s). It is likely that each objective will include several action steps. Each action step should identify the task to be accomplished, an individual responsible for accomplishing the task, and a timeline for task completion.

It is important to delineate the need for ACT resources (speakers, materials, etc.) during this step of the planning process.

It is recommended that the action steps be determined, if possible, during the meeting where the objectives are finalized or immediately following that meeting.

This step should result in the delineation of activities necessary to accomplish each objective (see page 16).

Step 8: Implement the Action Steps

Step 9: Assess the Outcomes

Each State Organization should determine how best to evaluate its plan's impact and success. It is suggested that an assessment of the outcomes includes both the activity and the results.

For example, if part of the plan were to host a meeting to advance good practices pertaining to reducing the dropout rate in the state's high schools, evaluation criteria would focus on the essentials of the meeting and the qualitative aspects of the meeting. Using the example above, an assessment of the activity itself might include the following questions:

- How many attended and from what schools/organizations?
- Did the meeting attract the audience the State Organization had targeted?
- Were the presentations well delivered and on target?

From a qualitative perspective, the following questions would be appropriate:

- Did anyone request follow-up assistance to further consider the solutions and principles presented at the meeting?
- Did anyone actually implement a good practice presented at the meeting?
- Did the meeting result in any measurable outcomes (recognizing that some results may not be visible for sometime)?

Each State Organization objective should be evaluated on an annual basis to determine if the objectives were achieved or progress was being made in order to inform the next planning cycle. In this connection the State Representative will assume responsibility for ensuring that the plan is monitored and for reporting on the status of the objectives.

Finally, it should be noted that careful planning is critical to organizational success. As a result, State Organizational planning should become a cyclical process. As objectives are realized, as priorities shift, and as new issues surface in the state, the ACT State Organizations should engage in an annual planning process.

ACT Resources in Support of State Organizations

A major and ongoing role of both the ACT State Lead and the Director of ACT State Organizations in the national office is to connect State Organizations with a wide variety of ACT resources that will assist in the realization of their objectives. A concerted effort will be undertaken to communicate with and make these resources accessible to State Organization leadership. One resource is the talented pool of ACT staff that may be available for special projects and conference presentations. Additional resources include, but are not limited to, research reports, information briefs, educational policy reports, newsletters, presentation support materials, and program description materials. Many of these resources will be delivered through the ACT website.

This page intentionally left blank.

Planning Documents

Step 1: Create a Planning Calendar

Step 2: Conduct a State Environmental Scan

Conduct an environmental scan by listing the educational issues confronting the state.

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.
- 11.
- 12.
- 13.
- 14.
- 15.

Step 3: Prioritize State Educational Issues

Prioritize (from highest to lowest) the educational issues identified in step 2.

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.
- 11.
- 12.
- 13.
- 14.
- 15.

Step 4: Align State Priorities with ACT's Strategic Goals and Initiatives

List those state educational priorities that align (directly or indirectly) with ACT's Strategic Goals and Initiatives.

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

Step 5: Prioritize the Subset of Issues

In priority order (from most important to least important), list the subset of state priorities that fit with ACT's Strategic Goals and Initiatives. This may result in the deletion of one or more of the priorities identified in step 4.

1.

2.

3.

4.

5.

6.

7.

Step 6: Develop State Organization Objectives

Develop a manageable number of objectives that address the priorities established in step 5.

Objective 1

Objective 2

Objective 3

Objective 4

Step 7: Define Action Steps

Describe the activities that need to be accomplished to achieve the State Organization's Objective(s). (Use one form for each objective.)

Description of the Activity	Person(s) Responsible	Completion Date
-----------------------------	-----------------------	-----------------

Description of the Activity	Person(s) Responsible	Completion Date
-----------------------------	-----------------------	-----------------

Description of the Activity	Person(s) Responsible	Completion Date
-----------------------------	-----------------------	-----------------

Description of the Activity	Person(s) Responsible	Completion Date
-----------------------------	-----------------------	-----------------

Description of the Activity	Person(s) Responsible	Completion Date
-----------------------------	-----------------------	-----------------





ACT National Office
500 ACT Drive
PO Box 168
Iowa City, IA 52243-0168
Telephone: 319.337.1000

