School Discipline Summit Planning Guide

February 2016

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Introduction

> *Being suspended **once** in ninth grade is associated with a twofold increase in the likelihood of dropping out, from **16%** for those not suspended to **32%** for those suspended only once (Losen D.J. & Martinez, T.E., 2013).*

A growing body of evidence has demonstrated the negative impact that punitive discipline has on children and youth. As such, educators, judges and court administrators, health providers, child welfare personnel, law enforcement, advocates, and youth have been motivated to make changes (Aizer & Doyle, 2013; Carmichael, Whitten, & Voloudakis, 2005; Columbi & Osher, 2015; Fabelo et al., 2011; Kang-Brown, Trone, Fratello, & Daftary-Kapur, 2013; Lee, Cornell, Gregory, & Fan, 2011; Morgan, Salomon, Plotkin, & Cohen, 2014; Mosehauer, McGrath, Nist, & Pillar, 2012; Stearns & Glennie, 2006; Suh, Suh, & Houston, 2007). To make changes in school discipline, it is important for all stakeholders to know about the latest research, understand the local impact of punitive discipline on systems and youth, and coordinate a collaborative response. One approach that some states have used is to host a statewide (or regional or local) summit with key stakeholders.

Benefits of Hosting a Summit

There are numerous benefits to hosting a summit focused on improving school discipline—representatives from different districts and counties from across a state can (a) come together to discuss a common goal; (b) obtain a better understanding of the issues in the jurisdiction; (c) meet others from different sectors that are involved with school discipline, forming a school-justice partnership; and (d) promote positive outcomes for young people.

A summit can also provide a space for participants to build relationships with their peers; youth; community leaders; and members of the justice, education, health, child welfare, and law enforcement systems. Participants can include individuals who are dedicated to improving and further understanding the way school discipline operates in schools across their state/region/locality as well as how policies and practices can affect a young person's engagement in school or involvement in the juvenile justice system.

Purpose of This Guide

This document is a quick guide that organizations, agencies, and other key stakeholders engaged in improving school discipline can use to understand the major steps needed in planning a summit focused on school discipline. It includes a planning worksheet with helpful templates and questions to consider.

This guide would be most useful for those who are in the beginning stages of summit planning. It's important to note that planning a summit can take up to 4–6 months for a smaller event and up to one year for a larger event. The guide contains:

1. Initial steps for planning a coordinated state, regional, or local summit on supportive school discipline, improving justice-school partnerships, and fostering positive outcomes for youth in a state/community;

2. Suggested practices for holding a successful summit; and

3. Resources that can be used during the planning, delivery, and follow-up phase.

Step 1: Set Foundation for Summit Planning

To host the summit, **it is critical to have core leadership and sufficient funding in place**. Without them, it will not be possible to coordinate or understand the parameters within which you have to work. A small group of key leaders needs to come to consensus on the overall intent of the summit and each leader's capacity to help. The leaders need to be fully committed to work through initial cumbersome hurdles, including securing funding, recruiting a champion (Step 2) and a summit planning team (Step 3), and making decisions throughout the planning process.

One of the biggest barriers that groups who want to host a state summit encounter is financial (Fister, 2015). It is essential to understand what funding is and is not available before moving forward with planning. It is also highly recommended to have team members who are knowledgeable about the philanthropic sector and writing grant proposals.

Step 3, below, includes resources on the roles of summit planners, including the leading coordinators. Chapters 4 and 5 of Youth Employment Summit—Event Planning Book (pp.17–22) discuss how to make a budget and cover costs for the event. The resources below relate to finding funding for such an event.

- A Guide to Funding Resources provides links to funding opportunities and online guides to assist grant writers; details the funding process, how federal and private funding functions, and how to obtain funding; and provides other critical methods and explanations to help obtain funding.

- Foundation Center is the leading source for information about philanthropy worldwide, the Center maintains the most comprehensive database on U.S. and global grant makers and their grants.

- Grant Writing 101: Resources for Grant Writers provides a condensed and detailed list of resources to assist with grant writing.

Step 2: Identify and Secure a Champion

Having a respected and compelling champion at the table is vital while planning and hosting a summit. A champion will be the voice for your effort, keep members aware of changing politics and initiatives, serve as a bridge between systems, and bring to (and keep) other influential stakeholders at the table. In other words, the champion typically is not one who manages the details of the summit but one who brings big ideas and connections. This person can be anyone with a link to and influence across the justice, education, and mental health communities (e.g., a chief justice), and/or be a charismatic, well-informed academic from a college or university. This individual should be someone who is not only willing to help but also has an understanding of what needs to be accomplished, shares a similar perspective on how to tackle issues, is willing to speak up, will motivate others to

> "I am filled with gratitude to all those who made this remarkable venture possible…I pause to underscore my immeasurable debt to Kathleen DeCataldo and Toni Lang of the Permanent Judicial Commission on Justice for Children, The Atlantic Philanthropies, and the firm of Skadden, Arps, who has hosted this initiative from its very first sparks in Fall 2009."
> —**Former Chief Judge Judith S. Kaye** on the creation of the New York City School-Justice Partnership Task Force
> *(Kaye, J., & New York City School-Justice Partnership Task Force, 2013)*

contribute to the effort, and is willing to act as a convener. The resources below will help clarify the importance of securing a champion and the type of individual who could be a good fit and also provide ideas for making a pitch to a potential champion.

- What Is a Champion Connection? details what a champion is and how to form and maintain a relationship with such an individual.

- To Close a Deal, Find a Champion accurately describes the importance of a champion and explains what the person brings to the table.

- The Big Mistake That's Hurting Your Nonprofit (and How to Fix It) provides a detailed step-by-step guide on how to develop an elevator pitch and also provides examples of. and feedback on other readers' pitches in the comment section

Step 3: Form a Planning Team

Because the impact of school discipline crosses many systems, it is important to **engage key stakeholders—from youth to educators to judges—from the start**. In particular, as you are planning a summit on school discipline, it is critical to form a representative planning team comprising youth and their family members; mental health experts; and representatives from law enforcement, education, courts, and other agencies that interact with the juvenile justice system. Each perspective will be critical for solidifying the focus of the summit (Step 4), identifying the audience for the summit (Step 5), planning an appropriate agenda (Steps 6, 7, and 8), and contributing to the overall success of the summit.

As the team expands from the smaller group of leaders to a larger advisory group, be very thoughtful concerning who is going to be a part of the team. The team members should ultimately be able to unite under a **common set of goals** and have both the determination to keep the initiative moving forward and the ability to support one another through the process. The team should be **large enough to be representative but small enough to be an effective work group** that can make progress as efficiently as possible. Factors to consider when looking for members of your planning team include the following:

- Defining what their roles on the planning team may be (e.g., lead coordinator, logistics, communicator, note taker, contributor);

- Determining what skills are necessary for members to have to make the summit a success (e.g., visioning and goal-setting, communication, analytic, organizational); and

- Selecting members that are representative of the community and participants you are hoping to attract to the summit.

The following are resources to help you find and run a successful team:

- Effective Committees: The Basics reviews the basic concepts for running a successful planning team; provides helpful tips on what to do and what not to do; and includes a sample team meeting agenda and sample meeting feedback form.

- Targeted Community Action Planning Toolkit—Identify Key Community Leaders and Establish a Planning Team (pp. 9–10) provides examples of who should be on the planning team, how to recruit certain members (such as youth), important information on organizational structures, and more.

- Sample Conference Planning Timeline provides a few suggestions on how to organize your team to complete these logistical tasks.

Step 4: Determine Summit Outcomes

The desired outcomes for your summit can be challenging to conceptualize, but it is critical to discuss possible outcomes early in the planning process so you are **planning with the end in sight**. This process will anchor the team and help keep everyone dedicated to the long-term goal, even when the discussion becomes difficult and seems plagued with barriers.

To plan summit outcomes, the team must know:

- Where they stand together on the issue they're planning to tackle;
- What is working and not working for young people;
- What supports are necessary to move the initiative forward; and
- What needs to change to move beyond the status quo.

Members must also determine:

- What the expected impact of the summit will be on participants in the short term;
- How the community is going to benefit in the long term;
- The type of impact they want to have on the youth and families in the community; and
- How the community can sustain these initiatives moving forward.

An excellent tool to assist with this step in the process is a **logic model**, which is a step-by-step approach for defining and measuring short- and long-term outcomes. When developing tangible outcomes for a summit, creating a logic model is not necessary but can be extremely helpful. The following resources will help define what a logic model is and how to develop one.

- Shaping Outcomes and Logic Model provides a general introduction to what an outcome is and the benefits of developing an outcome-based program and a logic model, as well as initial steps for developing both.
- Logic Models: A Tool for Effective Program Planning, Collaboration, and Monitoring details what a logic model is, what purpose it serves, and how to create and use one.
- Strengthening Nonprofits: A Capacity Builder's Resource Library—Measuring Outcomes is a detailed guide on what a *measurable* outcome is, identifying where to focus, data collection methods, tools for analysis, and more; it describes how to determine outcomes and helps a team brainstorm these concepts.

Here are a few thoughts to keep in mind as you work through Step 4:

- ***Everyone must be on the same page.*** The goals and priorities have to be agreed upon by all members of the planning team (Step 3) and advisory team (Step 1) before moving forward to determine the next steps in the process. Finding agreement rests on securing the right team members, as described in Step 3.
- Some of your goals, objectives, and outcomes may be achieved quickly; others may be longer term. Find the "low-hanging fruit," and work on crossing that off the list first.
- To increase the likelihood of a successful summit, the planning and advisory teams must nail down the purpose and desired outcome of the summit before moving to Step 5.
- It might take a while to move forward from this step to the next, and that's okay.

Step 5: Identify the Summit Audience

Narrowing the audience of the summit is critical. The summit should not only appeal to participants' interests, it **should also move them to action**. To accomplish this, the planning team needs to think critically about whom to invite. As mentioned in Step 2, it is ideal for the diversity of the planning team members to match that of potential summit participants. If it was important for the planning team to include youth and their family members, community leaders, educators, judges and court administrators, and law enforcement, for example, the summit should include representatives from these groups in the summit audience.

For the desired summit outcomes to be achieved, whether they are long-term or short-term goals, **participants must become *engaged* with these concepts during the event**. They will share information and make new connections based on their experiences at the summit, so it is vital that they understand the importance of what the summit is aiming to achieve. This may mean that the audience includes only groups that are ready for change (e.g., have sufficient systems in place to move the change forward, are motivated to make changes), with the idea that summit participants could pilot approaches and mentor others later. Or, depending on school discipline data and priorities, it may mean that localities that have the highest rates of punitive discipline or highest rates of disproportionality in their response to student behavior are selected. The following resources will help throughout the process of identifying your summit audience.

1. Know Your Target Audience: 10 Questions to Ask provides guidance on how to narrow the focus audience of the summit and breaks down the top 10 questions to ask yourself, such as, "What is the desired action of your target audience?" and "How does your idea, service, or product help your target audience?"

2. Getting the Most Out of Your Summit: Planning Guide—Engage the Right People (pp.11–12) details how to engage the right people, suggests with whom to engage, and describes how to work with them strategically.

Step 6: Determine the Summit Theme

Deciding on a theme for your summit can be surprisingly tricky. While working through Step 4, it may have become apparent that many topics need attention and ultimately need to be discussed during the summit to achieve the desired outcomes. The **theme of your summit needs to resonate with all participants and anchor the summit's content**, guiding participants to achieve the goals and outcomes established in Step 4.

Be careful **not** to select a theme that is too broad. The theme "Reforming School Discipline," for example, would be too broad for a single summit; topics under this theme would be too numerous. Focusing on a more specific issue that a majority of jurisdictions are encountering would be more advantageous. "Disparities in School Discipline," "Reducing Arrests on School Campuses," "Improving Relationships Among School Resource Officers, Students, and School Staff," or "Improving School Climate" are examples of themes that are sufficiently focused while still permitting discussion of a wide range of topics that affect a large number of individuals from various sectors, including those who are newer to this topic. For more information, see the resources below:

- [Framework for Convening a Community Summit—Identify and Formulate Summit Goals, Themes, Objectives, and Breakout Sessions (pp. 8–9)](#) explains why the focus needs to be carefully sculpted and how to narrow the discussion topics.
- [Choosing a Theme for Your Meeting](#) details how to choose a theme for your summit and provides examples of how to integrate the ideas of that theme into the various sections of the summit.

Step 7: Decide on the Format of the Summit

As established earlier in this guide, engaging all stakeholders attending the summit is critical if you want to realize your goals and outcomes. A major factor contributing to the success of any summit is **determining the format of meetings, presentations, and discussions** (e.g., large vs. small groups) and the **flow of participants moving between sessions**.

Not only is it important that participants be actively engaged throughout the event, it is also vital that the information shared is delivered in the best way possible. Reflect on the outcomes and goals at stake. What is the best way both to deliver your message and engage your audience as well as provide the opportunity for participants to carry their knowledge back to their communities?

When you have a clear understanding of the outcomes and goals you are aiming to achieve, formatting the summit becomes easier. For instance, if the goal is to educate a large constituency of stakeholders, having large group sessions is important, because you want to make certain that all stakeholders hear the same message. If your goal is for participants to leave the summit with action plans that help move two to three significant issues forward, you will want to include small group sessions in the format of the summit so participants can develop action plans on a specific topic. You will also want to give some careful thought to the make-up of these smaller, action-based sessions so individuals in each group can put forward a diversity of ideas and approaches and contribute long-term development goals to the action plans.

The following resources are examples of how three different summits established their meeting formats. The first resource is the agenda from a **statewide** summit that details when plenaries occurred, what small group workshops took place, and when breaks were taken. This resource also provides potential topics to consider and may help you with Step 6 of the planning process. The second resource, a program guide from another **statewide** summit, is an excellent resource to help brainstorm the type of format that would work best for your summit, decide how to organize the summit, and see the individual sponsors who helped make the summit possible. The third resource, the agenda from a **national** summit, provides details on how the summit was organized. Looking at these resources may help you determine what is more realistic for your community or state in terms of budget, time, and audience.

- [Michigan Leadership Summit on School Justice-Partnerships: Keeping Kids in School and Out of the Justice System—Agenda](#)
- [Keeping Kids in School and Out of Court Initiative—Program Guide](#)
- [National Leadership Summit on School Discipline and School Climate—Agenda](#)

Step 8: Select Summit Topics

Selecting specific topics for the summit may seem simple since the theme and format have already been designated, but with such a wide range of school–justice and discipline topics to cover, this task could be more difficult than expected.

When you are selecting topics that will likely identify session titles, remember to **keep your outcomes as well as your audience in mind**. Ensure that the chosen topics align with the ideas and concepts that are headlining the summit. For example, if a summit theme is "Lesbian, Gay, Bisexual, Transgender, and Questioning (LGBTQ) Youth and the School-to-Prison Pipeline," having a plenary session to discuss racial dipartites in school discipline would not necessarily make sense, even though racial disparities also could affect LGBTQ students. It is also important to select speakers who are knowledgeable in the subject area but also engaging and effective in their presentation.

The first resource below provides an example of how and why the *2015 National Rx Drug Abuse Summit* chose their breakout session topics that it did. They also provide information on their summit presenters, all of whom are experts in their fields. The second resource details the summit tracks chosen for the *2012 Women and the New American Dream* summit, including the topics discussed under that track, the presenter and liaisons that facilitated the discussion, and a short description detailing why a track was selected to be a part of the summit.

- [2015 National Rx Drug Abuse Summit—Summit Tracks](#)
- [2012 Women and the New American Dream—Summit Tracks](#)

Once your team has decided on the topics that will be discussed, the next step is either to identify the best speakers for these topics or to reach out to individuals who can identify the best presenter for each topic. Your champions will come in handy for this task. They will be able to advocate for the cause and bring onboard more people with whom you can collaborate. A majority of state summits partner with state universities, the state department of education, and/or sectors of the state justice department. You will be surprised to learn how many individuals from these three sectors will provide their services and expertise for little or no compensation.

Step 9: Facilitate the Summit

Now that you have planned effectively for the summit, the final step is to deliver the quality summit that the planning team has spent months planning. If this hasn't already been done, it is recommended that a **subgroup of the planning team work together very closely** to ensure that summit logistics and processes occur as planned. The lead for the execution of the summit must work with a well-informed team to ensure that the inevitable challenges that will arise are promptly addressed.

Venue and room arrangement are important considerations for a successful summit. The environment should be adequate for the number and flow of participants and conducive to participants' discussion and interaction. For example, the rooms for plenary and breakout sessions should be selected based on the type of discussion that will be held in each session. It is also recommended that the small, well-informed team create a **checklist of critical logistical**

items to ensure they are ready before the summit's first scheduled event. This checklist would include items such as:

- Feedback and evaluation forms designed for each session;
- Room assignments for speakers;
- Printed, collated handouts and tools needed by each presenter and panel member in designated locations for ease of collection and distribution; and
- Slide decks and other documents (e.g., additional data or information relevant to attendees) loaded onto flash drives for participants.

Following are two related resources that will help you facilitate the summit effectively:

1. Sample Conference Planning Timeline provides a timeline for technical aspects of the summit, such as choosing a registration platform, making venue reservations, and more.
2. Event Planning Handbook: How to Organize an Event provides examples of and explains the logistical elements that need to be completed to make the event a reality.

Conclusion

The tips and resources provided in this guide are designed to help the organizers of a summit on improving school discipline. Summits play an important role in bringing together partners, colleagues, and other members of the community involved in school discipline matters. The intensity of summits has a way of providing an opportunity for important stakeholders and decision-makers to focus their attention exclusively on the school–justice partnership.

Although preparing to host a state or local summit may seem daunting, it can be done! The outcomes of the summit may not happen as quickly as desired, but with the support and help of the passionate team assembled to improve outcomes for young people, your goals will be met. The relationships and decisions that come out of school–justice summits are far reaching and can help a state or community achieve goals that were never imagined to be achievable.

Summit Planning Worksheet

Step 1: Set the Foundation for Summit Planning

Key Summit Leaders

Names	Who Approves Their Decisions?	What Parameters Do They Have?

Based on key leaders focus and direction, what is the key goal in summit planning?

Step 2: Identify and Secure a Champion

Potential Champions

Name	Affiliation	Who Can Connect Them to the Champion?	Pros	Cons	Rank Recruitment Priority

Which priority groups do you think you have to engage at the summit?

Of the potential champions, who would be able to communicate most effectively with the priority groups?

How might the champion affect the development of the summit (e.g., emphasize a particular topic, approach)? Is that ok?

Step 3: Form a Planning Team

Confirm your focus of the summit:

❏ Policy change

❏ Practice change

Indicate representatives you seek/secure to participate in the summit planning team:

❏ Education
- Administrator
  - State level
  - School level
  - District level
- Student support personnel (social workers, school psychologists, counselors)
  - State level
  - School level
  - District level
- Educator/teacher
- School board
- Union leadership

❏ Courts/Juvenile Justice
- Judge
- Prosecutor
- Public defender
- Court administrator

❏ Law Enforcement
- Sheriff
- School resource officer

❏ Advocates
- Community organization
- Family of young people
- Youth

❏ Child welfare personnel

❏ Mental health service provider

❏ Other

Is there a particular geographical area you are seeking to focus on?

Planning Team List

Name	Affiliation	Contact Information	Role on Planning Team	Particular Interest

Initial Summit Planning Team Plan

Coordinator of Meetings
Location of Meetings
Frequency of Meetings
Regular Schedule for Meetings
Notetaker (including action steps)
Planning Time Required

Step 4: Determine Summit Outcomes

What do you want people to know?

What outlook would you like people to have?

If stakeholders are committed to change, what do you anticipate they will do?

If they do that, what will ultimately change?

How will you know these changes took place?

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Step 5: Identify the Summit Audience

Whom do you want to engage according to the outcomes outlined above?

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Who are you hoping will meet those outcomes?

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Who needs to come to help them achieve those outcomes?

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Do you want a broad or narrow group of participants?

☐ Experienced, ready for change

☐ Based on data, representatives from areas needing tremendous change (e.g., highest rates of suspensions and expulsions)

☐ Focused geographical area

☐ Mix

Step 6: Determine the Summit Theme

Based on the outcomes outlined in Step 4 and your audience in Step 5, narrow the focus of the summit and its theme(s).

Focus

What is the main point of the summit?

Theme(s)

What ideas do you want participants to come away with?

Step 7: Decide on the Format of the Summit

What information and how much do you want the summit to convey?

What kinds of skills do the participants need to meet the outcomes above?

How can you integrate the key focus and themes across the summit?

Session Types

☐ Plenary session(s)

☐ Panel(s)

☐ Action planning session(s)

☐ Topical breakout session(s)

Step 8: Select Summit Topics

Based on the intended outcomes, key focus and themes, what topics need to be covered?

Topic Planning Template

Topics	What Is Critical to Cover	What Skills Are Critical to Practice	Session Type	Potential Speakers/ Facilitators

Step 9: Facilitate the Summit

Confirm each is complete:

☐ Participant agenda, list, handouts, materials

☐ Annotated agenda for planning team, support staff, and presenters/speakers that explains the role, location, and timing

☐ Materials

☐ Feedback form

☐ Space

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