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Strategies Quick Start Guide for Districts

Copy and Share a Plan

Improvement plans can be copied and shared from a district institution to school institutions under the district hierarchy. This applies to plans created by the district and plans created by any of the schools.

Follow these steps to copy a plan:

- 1. Open Strategies from your district's myJourney dashboard.
- 2. From the My Plans dashboard, click the Actions 🖉 drop-down to the far right of the plan you want to copy, and then click Copy 🖲.

≡		≌ Strategies						Welcome,
							Q	New Plan
	My Plans (1 plans)			Include Assoc	iated Institutions		
	Name	Institution	Creator	Last Modified	Start Date	End Date	Status ~	*
	2023 Continuous Improvement Plan	Demo District-	Institution Admin Demo District- Professional	04./17/2023	04/03/2023	05/03/2023		E Open
								 ✓ Edit ▲ Download in Delete ④ Copy

- 3. Select the information to be copied into the new plan:
 - To copy everything, select the checkbox Copy the entire plan with all information G.
 - To copy only certain plan statements, select the checkbox **Check box to include the Vision**, **Mission, and Believe Statements**, and then proceed to select the priority statements.
- 4. Click the Next 🕞 button.

ြုံ Copy Plan	×
1-2-3-4	
Copy the entire plan with all information from Continuous Improvement Plan .	
Create a New Plan with information imported from Continuous Improvement \ensuremath{Plan} .	
Step 1:	
Please review your current Vision, Mission, and Belief Statements. If there are no changes ch the box to include your new plan. Next, add the Priority Statement(s) that will continue to connect to your new plan. Then select "Next" to proceed.	ieck
Vision, Mission, and Belief Statement	
Check box to include the Vision, Mission, and Belief Statements	
Add Priority Statement(s)*	
Select one or more Priority Statements	•
* Indicates required field	



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- 5. If you did not copy the entire plan, complete steps 2 and 3 of the Copy Plan process.
- 6. On step 4 of the *Copy Plan* process, modify the **plan name** (and **target dates** (optional). (By default, when copying a plan, the plan name is automatically appended with *Copy*.)
- 7. Click the Add New Plan button 🕕.

<u>ل</u> co	opy Plan	×
1-2	4	
Step 4: Please remember to rename your copied plan of use and identification. Then select "Add Ner Name your Plan*		ates for ease
2024 Continuous Improvement Plan - Copy		
Select Target Dates	F	Remaining: 48
Start Date	End Date	i
* Indicates required field	Previous Ad	ld New Plan

- 8. Select the institutions the new plan should be copied to:
 - To copy the plan to the district and all schools under the district, select the checkbox Select all **0**.
 - To copy the plan to the district only, select the checkbox District Only I.
 - To copy the plan to only certain schools under the district, select the checkbox for each individual school 🔞.
 - To copy the plan to the district and certain schools under the district, select the checkbox **District Only 1** and select the checkbox for each **individual school 1**.
- 9. Click the Finish ^[] button to complete the process.

🕒 Copy Plan 🛛 🗙	
Select institutions below*: Demo District- Professional Development - (District Only) Demo Elementary School- Professional Development Demo High School- Professional Development Demo Middle School- Professional Development	
* Indicates required field Previous Finish	

The plan is displayed on the My Plans dashboard for each institution it was copied to, but you must refresh the page for the plan to appear on the district's My Plans dashboard. Should they choose to, the individual schools can rename their copy of the plan and/or modify the target dates.

