



CDA Planner

The CDA Planner is an all-in-one organizational and reflective tool designed to support Community Development Agents (CDAs)¹ in planning, documenting, and reflecting on their work throughout the school year. From big-picture yearly overviews to detailed trackers, this planner helps CDAs capture important information about CLC operations.

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¹In this document, "Community Development Agent" (CDA) refers to any person or team carrying responsibility for implementing the CLC Action Plan, regardless of official title.

How to use this planner

This planner is your companion for navigating the dynamic, relationship-driven work of a Community Development Agent (CDA). It's designed to help you stay organized, track your impact, and reflect on the meaningful connections you build across your school and community.

Here's how to make the most of it:

DIGITAL VS. PAPER

This planner is designed to work in whatever format supports your workflow.

- Go Analog: Print it out and keep a copy in a folder or binder.
- Go Digital: Make a copy to create your own editable version, or download it as a PDF if you prefer to type directly into the templates.
- Go Hybrid: Use digital logs for easy updates and reporting and print templates for note-taking during meetings.

START WITH THE BIG PICTURE: SETTING THE STAGE AND TYPES OF TASKS

- Download a copy of your CLC Action Plan and include it in your CDA Planner folder to help anchor your work in a clear vision. The CLC Action Plan supports you in aligning your daily activities with broader school and school board goals. Along with the CLC Online Journal, it helps track progress on outcomes that matter.
- Review the CDA work categories to get clear on the type of tasks you will engage with in your role.

YEAR AT A GLANCE AND MONTH-BY-MONTH PLANNING

- Included are two templates to help you create a snapshot of the year ahead and help you stay organized, anticipate busy periods, and capture key learning moments as they happen.
- Use them to map out major events, identify partners, and note important logistical details.

COORDINATE AND COLLABORATE

- Use the Partnership Engagement Log to track who you're working with. Since the Online Journal does not capture individual meetings, this log can help you keep track of the collaboration before (and during, and after) it generates an activity, funding, and/or a material donation.
- Use the Meeting Logs to keep track of key conversations with staff, principals, and other key internal stakeholders.

TRACK FUNDING & GRANTS

- Use the Grant Tracker to maintain a high-level overview of funding opportunities, deadlines, and reporting requirements.
- Use the Grant Information Template to capture detailed information for each grant, including partners, budgets, conditions, reporting, and reflections.

REFLECT AND ADJUST

- The Reflection Section offers a space to step back and assess what's working, what needs adjustment, and reminds you to capture the process for yourself and your collaborators.
- You are encouraged to schedule some time throughout the year for reflection. If you are unlikely to take the time for solo reflection, you can schedule some time with your partner(s), school team, school-board rep, and/or a member of the PRT.

USE WHAT YOU NEED AND MAKE IT YOURS

- Not every section will be relevant every day. This planner is flexible. Use the parts that support your workflow.
- Add in any additional information and templates you find useful to create a customized planner to support you in your work.

Work Categories: Understanding Your Tasks

Your work as a Community Development Agent spans four main categories: People, Admin, Projects, and Professional Development. Depending on your job classification, the tasks assigned by your school board and principal(s), the time of year, and the priorities you are focusing on, some categories will take precedence over others. Learning to balance these priorities comes with experience, strategic planning, and a reflective practice.

People

CONSULTATIONS, COMMUNICATIONS & OUTREACH

- Internal: School Staff, Administrator(s), Students, School Board Personnel, Governing Board, Home & School Association, Parent Participation Organization (PPO), Daycare staff
- External: Families, Partners, Service Providers, Community Roundtables, CLC Network

Admin

STRATEGIC PLANNING, DATA COLLECTION & REPORTING

- Needs assessment/data sourcing, developing an annual plan (CLC Action Plan)
- Data Collection (surveys, participation numbers, feedback)
- CLC Online Journal, reports for internal stakeholders, reports for partners/funders
- Board-related forms and procedures

Projects

PROGRAM DEVELOPMENT, PLANNING & COORDINATION

- Project planning
- Sourcing funding & partners
- Resource management & allocation

Professional Development

PROFESSIONAL DEVELOPMENT & LEARNING OPPORTUNITIES

- LEARN: PD Workshops, Conferences, PLCs, Networking opportunities, Partner Spotlight, Coaching and Consultation Services
- School Board: CLC Team Meetings, Board-Wide PD and Workshops
- External: Organizational partners (PD and Networking opportunities), Centres of Excellence, Books, Articles, Podcasts

Tip: Jump to pages 19 and 20 for a self-assessment on People, Admin, and Project categories.

Year at a Glance | Instructions

These templates help you plan and track your year at a glance.

Use them to map key dates, anticipate busy periods, and capture learning as it happens.

Together, they support both planning and reflection across the school year.

How to Get Started

- Identify your main areas of work: People, Admin, Projects, and Professional Development.
- Map the school year timeline: open house, parent nights, holidays, ped days, exams, and major school events.
- Add known projects, partner and staff meetings, community roundtable meetings, PD and conferences, grant deadlines, and reporting requirements.
- Layer in projects that are still in development, noting approximate timing and duration.
- Review the timeline based on your actual work schedule (hours, days, locations, and schools, if applicable).
- Consider scheduling check-ins with school administrator(s) at key moments in the school year.

HORIZONTAL - YEAR AT A GLANCE (SNAPSHOT)

This high-level planning template gives you a snapshot of the year. Note major events, themes, or focus areas for each month. Keep it simple! Titles or short notes help you spot busy periods and align activities with the school calendar.

VERTICAL - YEAR AT A GLANCE (DETAILED)

This template supports real-time planning and reflection. Use it to track events, partners, logistics, and notes for next time. Think of it as a living timeline that helps you document what worked, what to adjust, and who to reconnect with, supporting coordination, reporting, and future planning.

MORE HELPFUL CALENDARS & RESOURCES

Use the following resources to support your Year-at-a-Glance planning and avoid scheduling conflicts. Refer to what is most relevant to your context.

- School & School Board Calendars: ped days, exams, reporting periods, school events, GB and Staff meetings
- CLC Network Calendar: Online Journal & Action Plan deadlines, PRT PD calendar
- Community & Partner Calendars: Municipal events, partnership tables, key community organization events
- Funding & Reporting Timelines: Grant deadlines, funding reports, partner reporting requirements
- Personal Work Schedule: hours, workdays, schools, locations
- Intercultural calendars: (MEQ website resources in [English](#) and [French](#))

July	August	September	October	November	December
January	February	March	April	May	June

July	August	September	October	November	December
	Back to School	National Day for Truth & Reconciliation (Orange Shirt Day)	- National Senior's Day - Thanksgiving	First CLC report (Online Journal) due - Remembrance Day & Veteran's Week - ECE Week (order materials)	Winter holidays
January	February	March	April	May	June
	Second CLC report (Online Journal) due - Literacy Month - Black History Month - School Perseverance week - Teacher and Staff appreciation week - Pink Shirt Day	- Nutrition Month - Semaine de la Francophonie - International Women's Day FYI: Many community organizations are closing out their fiscal year this month - connect with them early in the month to see if they have any funds they need to spend before March 31st	- Earth Day - National Volunteer Week	Final CLC report (Online Journal) due CLC Action Plan due CLC End of Year Survey - Quebec Family Week - Mental Health Week	- Indigenous History Month - Paternity Week

Month by Month | CLC Events

	Events	Partners	Logistics	Notes/Next Time
AUGUST				
SEPTEMBER				
OCTOBER				
NOVEMBER				
DECEMBER				
JANUARY				

Month by Month |

	Events	Partners	Logistics	Notes/Next Time
FEBRUARY				
MARCH				
APRIL				
MAY				
JUNE				
JULY				
NEXT YEAR				

Example for Vertical Template

Events	Partners	Logistics	Notes/Next Time
Welcome BBQ → Families, Community	- Grocery store (donations) - City (events coordinator to hand out info/flyers for events)	☐ Principal already secured donations; ask about delivery date and storage ☐ Ask 2 teachers & caretaker to help with set-up ☐ Need table for city reps to set up ☐ Ask for Parent volunteers	Have a backup date in case of inclement weather - inform all partners and volunteers in advance
Outreach to partners	- Municipality (esp. library) - CHSSN/NPI - Table de concertation - Maison de la famille	☐ Confirm date for community night ☐ Ask partners for their events calendar if available	Ask if library can make cards on-site during school events
Check-in with PRT		☐ Set up meeting with PRT rep (email/booking page)	Ask about ☐ Funding for lunch/snack programs ☐ “Ma place est ici” ☐ Kitchen Brigades ☐ Upcoming PD
Review Action Plan w/ School Principals in Multi-Site CLC		☐ Set up meeting with principals ☐ Email Action Plan to new principal(s)	Ask lead principal to set up the calendar invitation → send them my work days schedule

Partner Landscape

What is your Partner Landscape this year?

Key Organizational Partners

- Who are your key partners this year?
- What are their strategic goals/orientation for this year/funding cycle? What are their offers of service?

HELPFUL RESOURCES

- [Community Organizations Resource Guide](#)
- [Working with partners](#) (multiple resources)
- Local or regional directory of services and organizations
- Create (or update) an [Asset Map](#) of the partners, service providers, and important places in your community.

Partnership Engagement Log

Organization	Contact Information	Role	Purpose of Partnership	Date(s) of contact	Notes



Meeting & Communication Log

TYPE OF MEETING:

☐ Principal Check-in

☐ Staff Meeting

☐ Governing Board

☐ CLC Team Meeting Other:

☐ PRT

☐ Other: _____

DATE: _____

PARTICIPANTS: _____

Key Topics & Notes (Brief Summary)

Topic/Agenda Item	Notes/Discussion Points	Links to CLC Action Plan Note where this meeting supports the CLC priorities

Decisions & Action Items

Action/Task	Person Responsible	Deadline	Status (NS=Not Started, IP=In Progress, C=Completed)
			☐ NS ☐ IP ☐ C
			☐ NS ☐ IP ☐ C
			☐ NS ☐ IP ☐ C

Follow-Up/Next Steps

Item	Plan/Next Contact

Shared Communication Template

This template can be copied into a new document and shared with the principal(s) of the school(s) you support. It functions as an abbreviated log of your discussions and a tracker for any action steps. As with any template, feel free to modify it to suit your needs.

EXAMPLE:

School	Date	Update/Issue	Action Required	Due Date	Status	Notes
Parkdale	01/18/2025	Parent Engagement Night	Approve Flyer	01/20/2025	Pending	Sent via email
Gardenview	01/18/2025	Volunteer training scheduled	Confirm date	01/21/2025	Completed	Confirmed 1/18
Maple Grove	01/20/2025	Community Movie Night	Add to Principal Newsletter	02/20/2025	Pending	Sent via email

TEMPLATE:

School	Date	Update/Issue	Action Required	Due Date	Status	Notes

Grant Information Template

Use this template to capture important information about individual grants, from application through reporting.

GRANT OVERVIEW

Grant or Funding Program Name: _____

Funder / Organization: _____

Focus Area / Priority: _____

Amount Requested: _____ Amount Awarded: _____

School(s) / Project Name: _____

Lead Partner(s): _____

APPLICATION DETAILS

Application Deadline: _____ Submitted On: _____ Submitted By: _____

Application Link / Portal: _____

Documents Required:

- ☐ Application form
- ☐ Budget
- ☐ Letters of support
- ☐ Data / needs assessment
- ☐ Other:

Status:

- ☐ Planning ☐ Submitted ☐ Approved ☐ Declined ☐ Waitlisted



DECISION & RECEIPTDecision Date: _____ Notification Received: ☐ Yes ☐ NoFunds Received: ☐ Yes ☐ No Date Received: _____

Conditions / Restrictions: _____

IMPLEMENTATION & TRACKING

Project Start Date: _____ Project End Date: _____

Budget Notes / Spending Tracking: _____

Key Partners / Roles: _____

REPORTING REQUIREMENTS

Report Type	Due Date	Submitted	Notes/ Link to documents
<i>Interim</i>		☐ Yes ☐ No	
<i>Final</i>		☐ Yes ☐ No	
<i>Other</i>		☐ Yes ☐ No	

SUPPORTING INFORMATION**Data to Collect:**

- ☐ Participation numbers
 ☐ Surveys / feedback
 ☐ Photos / stories
 ☐ Outcomes / impact indicators
 ☐ Other:

Where Is Documentation Stored?

Examples: Online (TEAMS or Google Drive), physical binder, shared

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Grant Tracking Template

Reflection | Project Debrief

This reflection is designed to be completed after a major project, program, or initiative, particularly those carried out in collaboration with one or more partners. Taking time to debrief shortly after an activity allows you to capture key learnings while details are still fresh before moving on to the next priority.

This process helps you document what worked, identify areas for improvement, recognize contributions, and clarify impact. It also creates a record you can draw on for reporting, storytelling, future planning, and strengthening partnerships.

Use this section to reflect, adjust, and intentionally build on the experience for next time.

Highlights & Successes <i>What worked well?</i>	Key Learnings <i>What contributed to its success?</i>
Challenges & Obstacles <i>What didn't go as planned?</i>	Adjustments/Support Needed <i>Actions to improve or adapt</i>
Capture the process <i>What were all the tasks involved? Who did them?</i>	Make it easier <i>Who could help next time? When to start the planning next time?</i>
Capturing the impact <i>What were we trying to achieve? Did we capture all the data needed?</i>	Showcasing impact <i>Did we showcase the impact of this program/event? How? To whom?</i>

Reflection | Developing Relationships & Trust at My School(s)

Strong relationships are the foundation of effective community school work. Staff are more likely to collaborate, share needs, and engage with initiatives when they know you, trust you, and understand your role. Building these relationships takes time, intention, and consistent presence, and it directly contributes to the success of your CLC.

Use this section regularly to reflect on how you are building and maintaining relationships within your school(s).

RELATIONSHIP-BUILDING REFLECTION

How visible and present have I been in the school community this month?

- Which staff members have I connected with informally (hallway conversations, check-ins, shared moments)?
- Who do staff go to when they have an idea, concern, or opportunity? Am I one of those people?
- Where do I feel strong trust and collaboration? Where is it still developing?
- How have my actions helped staff feel supported rather than “asked to do more”?

RELATIONSHIP-BUILDING CHECKLIST

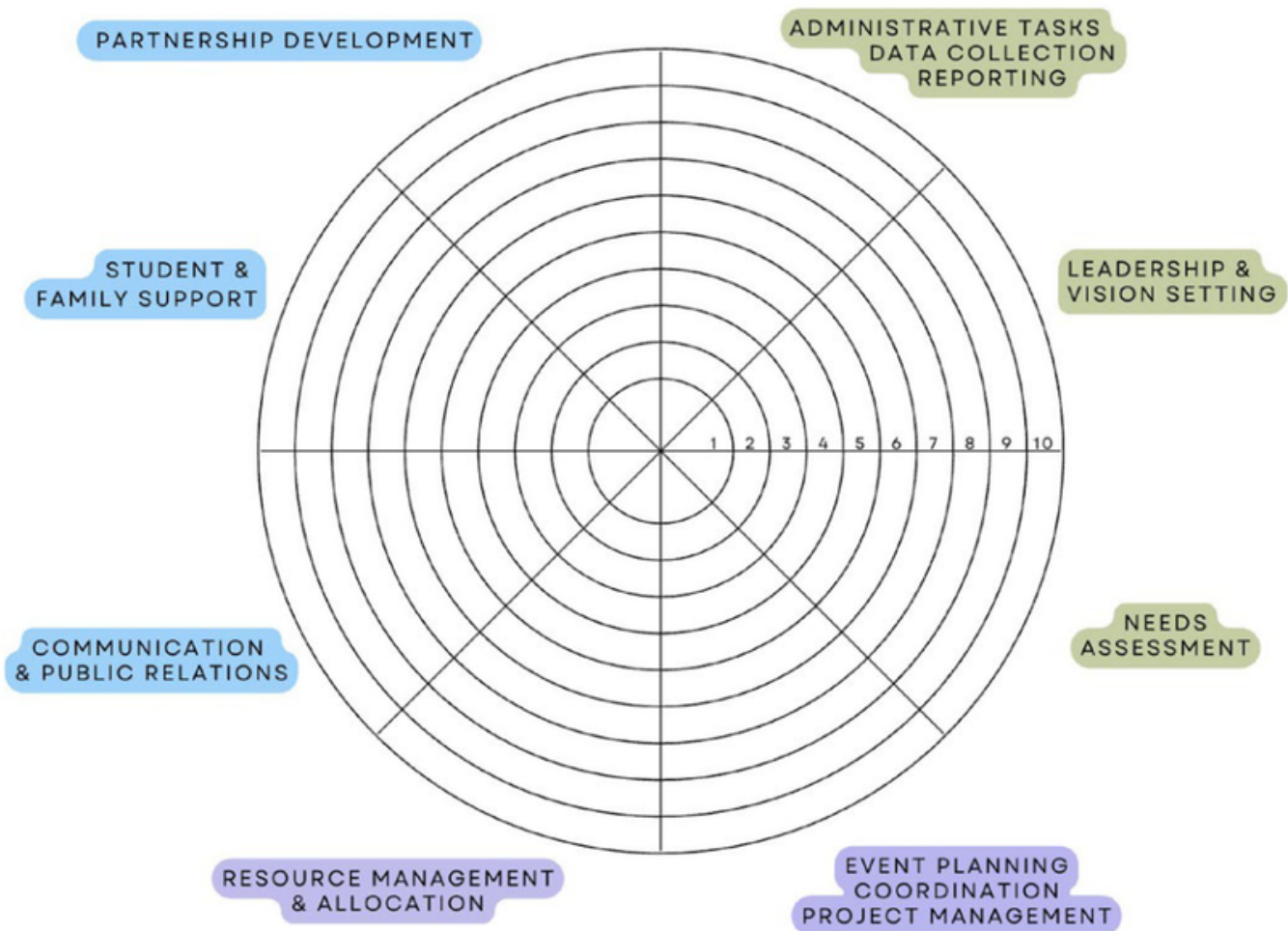
Use this checklist to intentionally strengthen staff relationships over time:

- ☐ I have taken time to introduce myself and my role to new staff
- ☐ I regularly check in with staff outside of project-related needs
- ☐ I listen to staff priorities and constraints before proposing initiatives
- ☐ I follow through on commitments and communicate clearly
- ☐ I acknowledge staff contributions and celebrate shared successes
- ☐ I am present at school events, meetings, or informal gatherings when possible
- ☐ I seek feedback from staff about what is working and what could improve
- ☐ I adapt my approach based on staff comfort levels and readiness

LOOKING AHEAD

- Which relationships would benefit from more time or attention next month?
- Who could I proactively connect with to strengthen trust before launching new initiatives?
- What small actions could help deepen collaboration (coffee chat, classroom visit, co-planning)?

Wheel of CDA Life



INSTRUCTIONS

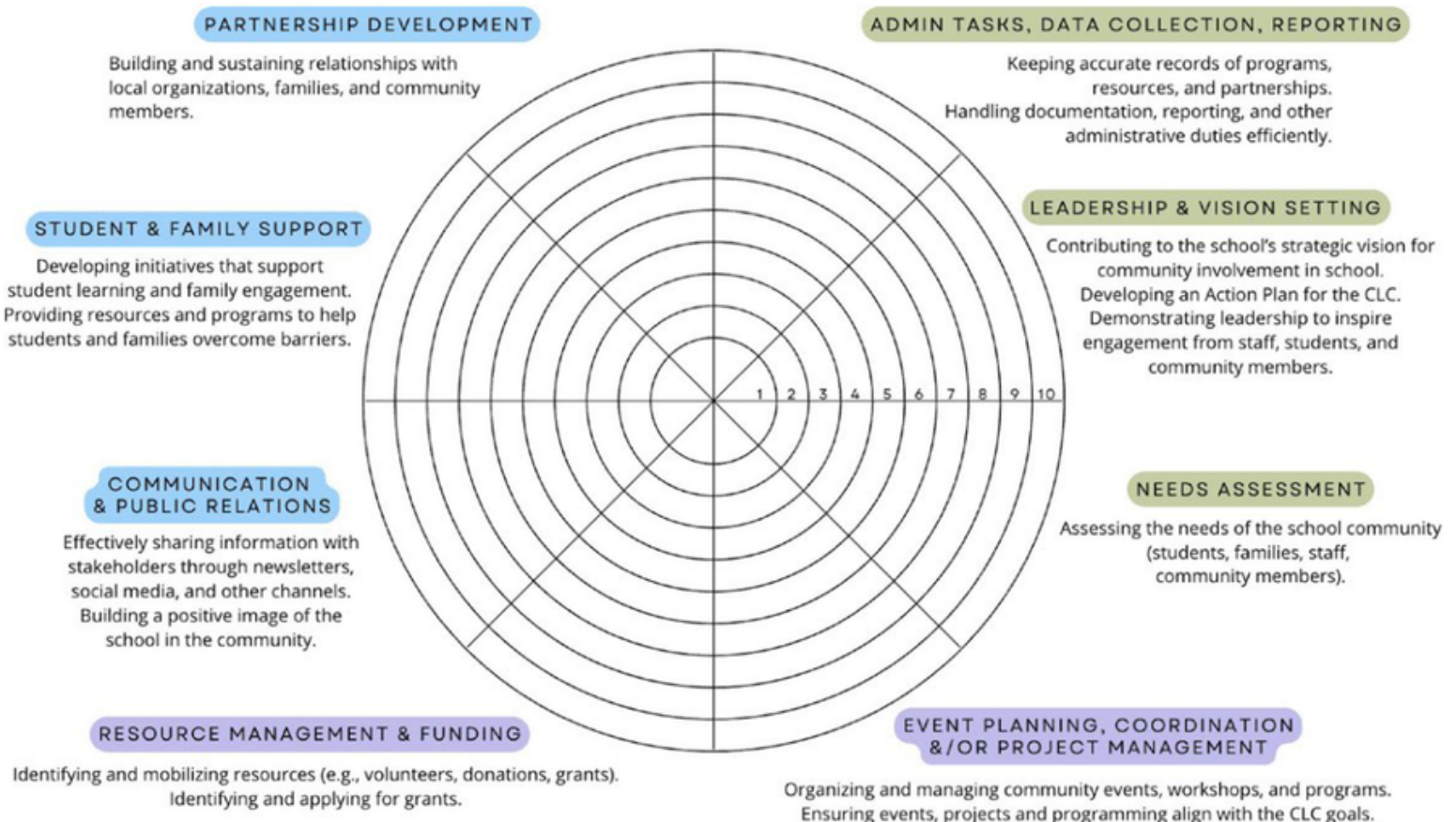
Rate your strength in each area of responsibility:

1 = "needs significant improvement" to 10 = "excellent"

Plot each rating on the wheel by marking a point along the spoke for each section.
Connect the points to see a visual representation of your strengths across all areas.

Proceed to reflection questions.

Wheel of CDA Life



REFLECTION

- Which area(s) do you feel strongest in?
- Where do you see room for improvement?
- What small actions can you take to improve your strength in lower-rated areas? How does each area impact the others?
- In which areas do you need additional support or PD?