

Orientation Participant Handout

Orientation Purpose

The Orientation session is to answer the question, “Who are we and what are we being asked to do”? The Orientation session paints the “Big Picture” of the strategic planning process so that all strategic planning team members have a shared understanding of the process and their roles and responsibilities in helping the district set clear direction for the future.

At the Orientation, team members will meet one another and learn the stakeholder group that each represents. Stakeholder groups include: community, families, students (in K-12 districts), certified staff, non-certified staff, management, board and union.

The Orientation session will include opportunities to learn about the current plan and the status of plan execution and results.

Common Vocabulary

Change management	A structured approach to transitioning individuals, teams and organizations from a current state to a desired future state.
Organizational alignment	The existence of a consistently clear understanding of the district’s mission, vision and strategy throughout the entire organization. An aligned organization is one where everyone understands how each level of the organization contributes to the aspirations of the organization. It is clear to all how departments, teams and employees interact to create value for the organization’s customers and connect to the organization’s vision.
Perspective	A view of the organization’s strategic performance viewed through a particular lens. Typical lens perspectives include financial stewardship, customer service, internal processes and organization capacity for learning and growth.
Strategic Goal	The specific continuous improvement activities, balanced across the perspectives, that break down strategy into components and make strategy actionable. The long-range goals that, if accomplished, will allow the district to fulfill its mission and vision. Goals must be specific, measurable, actionable, results-oriented, and timely (SMART).
Strategy	The choices made and the actions taken, from many choices and actions that are potentially available, to move the organization from its current state to some desirable future state. A “game plan” to address the top priorities that, if accomplished, will position the district to better achieve its mission, vision and goals.
Strategic Plan	The document used to communicate throughout an organization, and to its stakeholders and customers, the organization’s mission, vision, core values, goals and strategies. The document that sets “Big Picture” direction and focus and helps the district align its resources of people, time and money in that direction.
Strategic Planning	An organizational management activity that is used to set priorities, focus energy and resources, strengthen operations, ensure that employees and other stakeholders are working toward common goals, establish agreement around intended outcomes/results and assess and adjust the organization’s direction in response to a changing environment. Effective strategic planning articulates not only where an organization is going and the actions needed to make progress, but also how it will know if it is successful. The result of the planning process is a strategic plan.

An organization has two choices: Be intentional about the path the organization follows or turn on the organization's autopilot. If you are running your organization without a plan, you are just using the navigation system and not paying attention to how you are moving your organization to a higher level of performance. Strategic planning is not about taking on additional work; it is about taking all those numerous daily decisions and initiatives and making them part of an integrated, focused system. Strategic Planning is a continuous improvement process based on key questions:

1. **Where are we now?** (How would you describe what is working and what needs attention? What are the strengths, weaknesses, opportunities and threats as described by data, information and perceptions?)
 - a. **Mission statement**
 - b. **Data Review**
 - c. **SWOT (data analysis to identify strengths, weaknesses, opportunities and threats)**
- b) **Where do we want to be?** (What are your best hopes for the future? What do you want to be different 5-10 years from now compared to what it is currently? What is the preferred future?)
 - a. **Vision Statement**
 - b. **Values statement/commitments**
 - c. **Sustainable competitive advantage**
2. **How will you get from where you are to where you want to be?** (What will everyone do differently to get improved results? What research-based strategies will you implement with fidelity? How will what you do drive your professional development planning and implementation?)
 - a. **Long-range Goals**
 - b. **Critical Strategies**
3. **What are you learning?** (How will you be certain that your implementation of the research-based strategies is adding value and improving your results? How will you monitor and report your progress?)
 - a. **Action plans**
 - b. **Progress monitoring**
 - c. **Short-term goals, priorities and initiatives**
 - d. **Execution**

Surprising strategic planning stats:

- ✓ 95% of a typically workforce does not understand its organization's strategy.
- ✓ 90% of organizations fail to execute strategies successfully.
- ✓ 86% of executive teams spend less than one hour per month discussing strategy.
- ✓ 60% of organizations don't link strategy to budgeting.

Strategic Plans:

- Are based on the pillars of mission, vision, values/commitments and goals.
- Reflect the values of the organization.
- Define commitments and nonnegotiables.
- Set focus and priorities.
- Define the criteria for measuring success.
- Connect initiatives to needs and requirements.
- Define what we ALL need to do well together.
- Inspires action to achieve a big future.
- Guides everyone in daily decision making.

Agenda for Strategic Planning Orientation

Location: Board Meeting Room
Date: Wednesday, December 13, 2017
Time: 6:00 – 7:30 pm

Outcome	Activity	Facilitator/ Time
<i>Essential Question: Who are we and what are we here to do?</i>	Welcome. Identify who is in the room and what is the charge to the plan team. <ul style="list-style-type: none"> • Plan Team Roles and Responsibilities • Team Roster • Team Schedule of Meetings: Dates and Times 	Superintendent 5 MIN CEC Facilitator 15 MIN
<i>Discuss the homework articles:</i> <ul style="list-style-type: none"> • <i>Transforming the Teaching Profession</i> • <i>The Strategic Management Maturity Model</i> • <i>What is a Professional Learning Community?</i> • <i>Big Ideas Behind Whole System Reform</i> 	Ask the team to identify key concepts in the article read that they feel should assist the team as it works together to set a new direction for the district.	CEC Facilitator 15 MIN
<i>Review the strategic planning process.</i>	Set the pathway for the strategic planning process.	CEC Facilitator 15 MIN
<i>Review the strategic management system.</i>	Learn of district office survey results related to strategic management. Understand the importance of a strategic management system	CEC Facilitator 15 MIN
<i>Review the pre-read copy of the current district strategic plan.</i>	Hear short report about the status of the current plan	Superintendent or Designee 10 MIN
<i>Examine a district strategic plan as a model that illustrates what we hope to accomplish.</i>	Learn about the parts of an effective strategic plan and strategic planning process .	CEC Facilitator 5 MIN
<i>Preview the strategic plan website.</i>	Demonstrate how our work will be documented and accessible throughout the process for both team members and constituents.	Superintendent or Designee 5 MIN
<i>Preview the Data Retreat</i>	Preview the agenda and assignments for the Data Retreat	CEC Facilitator 5 MIN
<i>Adjourn</i>		

ACTIVITY ONE: Review the team roster, meeting schedule and roles and responsibilities of the plan team. Ensure commitment of plan team's members.

- **See Team Roster**
- **See Meeting Schedule**

The responsibilities of the planning team members include:

- Attend all meetings of the planning team.
- Prepare for each meeting by reading materials aligned to each agenda.
- Conduct a data analysis of the district at a Data Retreat by reviewing key data indicators and measures to determine the district's strengths and opportunities for improvement.
- Develop a shared understanding of the needs of stakeholder groups through a review of an environmental scan or stakeholder satisfaction data at a Data Retreat.
- Explore educational, demographic, political, economic, social, and technological impacts on the future of the district at a Vision Retreat.
- Explore research-based, effective practices of high performing districts at a Vision Retreat.
- Review and revise the district's shared mission, vision, values/commitments and goals at a Vision Retreat.
- Provide suggestions for indicators and measures that align to monitoring and reporting district success at a Setting Direction Retreat.
- Identify key strategy gaps that are aligned to the data-based opportunities for improvement through a review of the environment scan and/or system assessment (internal audit)
- Present a draft of the plan for stakeholder review and input.
- Revise and finalize the draft of the plan based on stakeholder review and input.
- Recommend the strategic plan to the superintendent.
- Learn about the responsibilities to live the Plan.

ACTIVITY TWO: REFLECTION ON ARTICLES READ

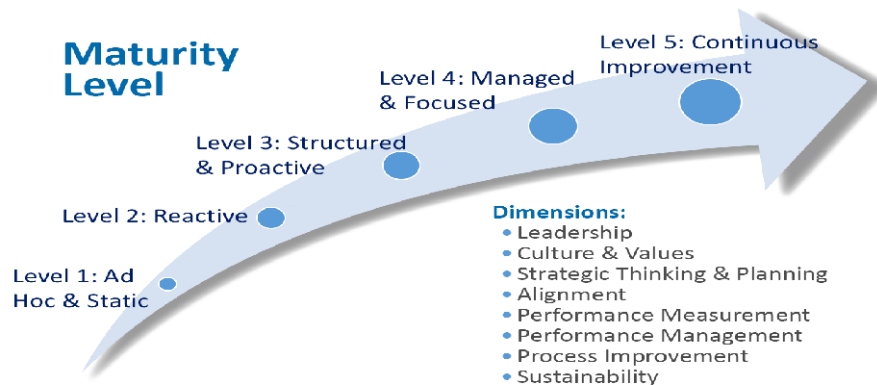
ARTICLE	IMPLICATIONS FOR OUR STRATEGIC PLAN WORK
<i>Transforming the Teaching Profession</i>	
<i>Big Ideas Behind Whole System Reform</i>	
<i>What is a Professional Learning Community?</i>	
<i>The Strategic Management Maturity Model</i>	

ACTIVITY THREE: REVIEW THE STRATEGIC PLANNING PROCESS



ACTIVITY FOUR REVIEW THE STRATEGIC MANAGEMENT SYSTEM

- *Are we doing things RIGHT? OPERATIONAL MANAGEMENT*
- *Are we doing the RIGHT things? STRATEGIC MANAGEMENT*
- *Assess the growth and performance of a district related to the dimensions of Strategic Management*
- *Allow benchmarking across districts or departments within a district to compare and learn from one another*



Dimension:	Level 1	Level 2	Level 3	Level 4	Level 5
Leadership					
Values and Culture					
Strategic Thinking and Planning					
Alignment					
Performance Measurement					
Performance Management					
Process Improvement					
Sustainability					

Dimension:	Total Points	Mean Score	Strength or Opportunity
Leadership			
Values and Culture			
Strategic Thinking and Planning			
Alignment			
Performance Measurement			
Performance Management			
Process Improvement			
Sustainability			

ACTIVITY FIVE: REVIEW THE STATUS OF THE CURRENT STRATEGIC PLAN

ACTIVITY SIX: EXAMINE A DISTRICT STRATEGIC PLAN BASED ON THIS STRATEGIC PLANNING PROCESS

One Page:

- Mission and Vision
- Core Values
- Long-range Goals
- High-Leverage Strategies

Supporting Documents:

- Vision Continuum
- Key Performance Indicators
- Strategy Action Plan Templates
- Commitments Aligned to Core Values
- Strategic Management System
- Living the Plan

ACTIVITY SEVEN: PREVIEW THE DISTRICT'S STRATEGIC PLANNING WEBSITE

One stop shop for strategic plan team as well as stakeholders who want to follow the process.

ACTIVITY EIGHT: PREVIEW THE DATA RETREAT

Date: January 17, 2018

Time: 8:00 am – 3:00 pm

Location: Board Room

Purpose: To paint a picture with data and other information of “where the district is now” with its performance.

- Academic Data and Information
- Culture Data and Information
- Resources Data and Information

We will examine trend, cohort, subgroup and comparative data.

We will develop a shared understanding of what is going well (Strengths) and what needs our attention (Opportunities).

We will produce a SWOT Analysis (Strengths, Weaknesses, Opportunities, and Threats)