Data Retreat Participant Handout

Data Retreat Purpose

The Data Retreat starts with existing elements, building on what is currently in place. Throughout the retreat, the plan team paints a data picture of the current reality of the district. It answers the question, "Where are we now"?

External analysis focuses on political, economic, social, demographic, educational and technological trends and forces. It includes examination of national and state educational requirements and mandates. It identifies customers' and stakeholders' needs.

Internal analysis focuses on culture and performance; communication clarity, employee's capabilities and capacities, internal stakeholder groups and their needs, core competencies and strengths, as well as weaknesses.

The analysis of strengths, weaknesses, opportunities and threats (SWOT) leads to review and possible revision of the vision, mission, core values and goals. It also informs identification of customers and stakeholders and their respective needs and interests.

The product of the retreat is the SWOT analysis that then is shared with all the stakeholder groups represented on the strategic plan team for feedback between the Data Retreat and the Vision Retreat.

Common Vocabulary

Competitive Advantage	A statement that explains what your district is best at. It describes what you do that is unique. It sets you apart from others.
Customers	The direct beneficiaries or end-users of the districts' services or products.
Environmental Scan	External and internal analyses of the districts' competitive position, policies and regulations, governance, markets, capacity and capability, customers and stakeholders.
Performance Measure	Provide objective evidence aligned to indicators and measures of progress toward a strategic goal and are an analytical basis for decision-making.
Perspective	A view of organizational strategic performance through a particular "lens". Typical perspectives include financial stewardship, customer service, capacity for learning and growth, internal processes, etc.
Process Measure	Performance drivers measure what is happening in the system or process that produces a specific output (efficiency, quality, timelines, waste).
Stakeholders	The universe of entities, wither as individuals or groups, that have an interest in the district. Examples include: students, families, employees, community, leaders, regulators, partners, etc.
SWOT Analysis	An acronym for Strengths, Weaknesses, Opportunities and Threats. They include inhibitors and drivers of organizational success.
Target	The desired level of performance for the reporting period in question.

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Agenda for Strategic Planning
Data Retreat
Location: District Board Room
Date: January 17, 2018
Time: 8:00 am – 3:00 pm

Outcome	Activity	Facilitator/ Time
Review who we are and what we are here to do ***Essential Question: Where are we now?***	Welcome Review who is in the room	David Negron 15 MIN 8:00-8:15 Slides: 2 Handouts: DNA
Review the strategic planning process. Learn the purpose of today's Data Retreat. ***Essential Question: How does today's work fit into the strategic plan "Big Picture?"***	Understand the Big Picture of the strategic planning process and the role of the plan team Set outcomes for the Data Retreat. Begin with the END in mind.	Mark Van Clay 15 MIN 8:15-8:30 Slides: 3-10 Handouts: DNA
Activity One: Identify key ideas from four homework readings that will assist us in assessing our data. ***Essential Question: How can effective practices in the field provide us ideas around how to use and manage data as evidence of continuous improvement?***	Log the top 3-4 top take-aways on your assigned wall chart. *How Do You Know?* *The X Factor Is Why* *The Five Habits of Effective PLCs* *Triple Strength Feedback*	Mark Van Clay 15 MIN 8:30 – 8:40 analysis 8:40 – 8:45 share Slide: 11 Handouts: 4-7
Activity Two: Learn about the results of the Strategic Management Survey. ***Essential Question: How does our District compare to elements of a highly effective strategic management system?***	Hear a summary report on the results of the Strategic Management Survey taken last week by the Administrative Team and the Strategic Planning Team. Assess the results in terms of potential District Strengths and Opportunities.	Mark Van Clay 25 MIN 8:45-9:05 presentation 9:05-9:10 analysis Slides: 12-14 Handout: 8
Activity Three: Review our perceptions about what is going well in the district and what our greatest challenges are for the future. ***Essential Question: What are our perceptions about what is going well in the district and needs to be continued and celebrated as well as what is not going well and needs attention?***	Each table determines Strengths of and Opportunities for the District, taking into account members' won District experiences and the information generated by the two previous activities.	Mark Van Clay 25 MIN 9:10-9:15 directions 9:15-9:40 analysis 9:40-9:50 share Slides: 15-16 Handout: 9
BREAK		10 MIN.

		9:50-10:00

Activity Four: Paint a data picture that describes the current state of the district as to what is going well and what are the challenges ahead.
 	
Reports include District State Report Card Summary Information along with important data the district collects to report its progress.
 	
Essential Question: What does the district data tell us? What does trend, cohort, subgroup, and comparative data tell us?
	Team will rotate through three, 45-minute reports given by district leaders.
	
	Hear reports related to:
	• Student Growth and Achievement (Presenter - Barbara Dahly)
	• Culture: Learning and Working Environment, Technology (Presenter - Caroline Pate-Hefty
	• Resources: Finance and Facilities (Presenter - Raymond Lauk)
	
	Reports will share status of current goals through key indicators/ measures.
	   • Where possible, report will summarize trend and comparative data.
	   • Where possible report will summarize progress toward district targets.
		Mark Van Clay – Achievement
		
		95 MIN
		Slides: 17-25
		Handouts: 10-12
		
		Directions:
		10:00 - 10:05
		
		Three rotating reports:
		
		First Rotation: 10:05-10:50
		
		Second Rotation: 10:55-11:40

LUNCH		40 MIN. 11:40-12:15

(Activity Three continued) Process learning's from reports: Analyze the key data indicators to determine what are strengths and what are opportunities for improvement	Teams will identify key findings from reports:
	  •What do the data tell us?
	  •What <u>don't</u> the data tell us?
	  •What data are missing?
	  •What is there to celebrate?
	  •What is there to consider for improvement?
	Teams will share with one another their findings.
		Mark Van Clay
		District Leaders
		95 MIN.
		
		Third Rotation
		12:15-1:00
		
		Processing
		1:00-1:40
		
		Report Outs:
		1:40 – 1:50

BREAK		10 MIN. 1:50-2:00
Activity Five: *Conduct a SWOT analysis* • ***Strengths*** • ***Weaknesses*** • ***Opportunities*** • ***Threats***	Identify our Strengths, our Weaknesses, our Opportunities and our Threats	CEC Facilitator 40 MIN. 2:00-2:40 Slides: 26-29 Handouts: 13-14 Report Out Top 2 for Each Area 10 MIN. 2:40-2:50
Set the stage for the Visioning Retreat	Discuss role of team members in sharing the learning from the Data Retreat with constituent groups. Preview the Vision Retreat Reflect on the Day	CEC Facilitator 10 MIN. 2:50-3:00 Slides: 30-33 Handouts: DNA
Adjourn		3:00

ACTIVITY ONE: REFLECTION ON HOMEWORK ARTICLES

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How Do You Know?

1.

2.

3.

4.

5.

More if necessary:

ACTIVITY ONE: REFLECTION ON HOMEWORK ARTICLES

The X Factor Is Why

1.

2.

3.

4.

5.

More if necessary:

ACTIVITY ONE: REFLECTION ON HOMEWORK ARTICLES

The Five Habits of Effective PLCs

1.

2.

3.

4.

5.

More if necessary:

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ACTIVITY ONE: REFLECTION ON HOMEWORK ARTICLES

Triple Strength Feedback

1.

2.

3.

4.

5.

More if necessary:

ACTIVITY TWO: STRATEGIC MANAGEMENT SURVEY REFLECTIONS

Table	Strengths	Opportunities
1		
2		
3		
4		
5		
6		

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ACTIVITY THREE: OUR PERCEPTIONS	
	Table #
What are we MOST PROUD about?	**What are our GREATEST CHALLENGES for the Future?**

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ACTIVITY FOUR DATA REPORT: STUDENT ACHIEVEMENT RESULTS

What did you learn about the student achievement and growth data that lets us know how the DISTRICT is performing? Performing compared to others? Performing compared to the past?

1.   **What do the data tell us?**

2.

3.

4.   **What _don't_ the data tell us?**

5.

6.

7.
                                                What data are missing?
8.

9.

10

Analysis of the Data from the Report on STUDENT ACHIEVEMENT	
Going Well; Needs to be Celebrated	*Could be better: Is a Possible Opportunity for Improvement*
1.	*1.*
2.	*2.*
3.	*3.*
4.	*4.*
5.	*5.*

ACTIVITY FOUR DATA REPORT: LEARNING AND WORK ENVIRONMENTS/ TECHNOLOGY

What did you learn about the learning and work environments/ technology that lets us know how the DISTRICT is performing? Performing compared to others? Performing compared to the past?

1.   **What do the data tell us?**

2.

3.

4.   **What don't the data tell us?**

5.

6.

7.

8.   **What data are missing?**

9.

10.

Analysis of the Data from the Report on LEARNING AND WORK ENVIRONMENTS	
Going Well; Needs to be Celebrated	*Could be better: Is a Possible Opportunity for Improvement*
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.

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ACTIVITY FOUR DATA REPORT: FINANCES and FACILITIES

What did you learn about the finances and facilities that lets us know how the DISTRICT is performing? Performing compared to others? Performing compared to the past?

1.   **What do the data tell us?**

2.

3.

4.   **What <u>don't</u> the data tell us?**

5.

6.

7.

8.   **What data are missing?**

9.

10.

Analysis of the Data from the Report on FINANCES and FACILITIES	
Going Well; Needs to be Celebrated	*Could be better: Is a Possible Opportunity for Improvement*
1.	*1.*
2.	*2.*
3.	*3.*
4.	*4.*
5.	*5.*

ACTIVITY FOUR: SWOT ANALYSIS

Table #

STRENGTHS: What do we consider to be our strengths? What advantages do we have? What do others say our strengths are?	**WEAKNESSES:** What do we consider to be our weaknesses? What are we most criticized for or receive the most complaints about? What do we seem to have a hard time doing well?
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.
6.	6.
7.	7.
8.	8.
9.	9.
10.	10.

	Table #
OPPORTUNITIES: What opportunities for improvement do we know about, but have not addressed? Where with a little work could we change a weakness into a strength? 1. 2. 3. 4. 5. 6. 7. 8. 9. 10.	**THREATS:** Who or what threatens us the most? What challenges are coming that we must respond to? What might block our progress? 1. 2. 3. 4. 5. 6. 7. 8. 9. 10.

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