SETTING DIRECTION RETREAT
Participant Handout

Setting Direction Retreat Purpose

The Setting Direction Retreat provides an opportunity for the strategic plan team to develop a shared understanding of the current mission, vision, core values and strategic themes and build upon those ideas to move the district forward in answering the question, *"Where do we want to be five years from now that is different than where we are today?"*

The outcome for the afternoon is for the plan team to verify Long-range Goals and Measures and Prioritize the Strategies that need most attention to move the district toward continuous improvement. The product of the day will be a DRAFT of the Strategic Plan.

Common Vocabulary

Goal	Long-range goals provide clarity in what the district hopes to achieve throughout the duration of the strategic plan timeline. They foster a results orientation and help close They help identify the targets and timelines that enable a staff to answer the question, "How will we know if all of this is making a difference?"
Strategy	Strategies are the actions required to guide plans to move the organization from where it is to where it wants to be. *Strategies are gaps that currently are not yielding the results that are necessary and if addressed would present the most probable return on the investment of time, people and other resources.* Strategies must be *few in number and comprehensive in action.*
Indicator	*The standards, skills, or evidence of performance that comprise or lead to attainment of a goal. Lagging indicators are summative in nature. Leading indicators are formative in nature. Indicators indicate what will be used as evidence for goal progress monitoring and reporting.*
Measure	*Measures are the instruments or tools aligned to the indicators that defines success. Often there are multiple measures for one indicator. Measures may be quantitative or qualitative.*
Target	Targets are *short term incremental steps measuring growth toward the Goal. Targets are set for each measure. Goals without targets lack power and usefulness.*
Action Plan	*An action plan defines the sequence of steps that must be taken, or activities that must be performed well, for a strategy to succeed. An action plan has four major elements (1) Specific tasks: what will be done and by whom. (2) Resource allocations: what specific funds are available for specific activities; timelines; people responsible (3) Professional Learning and Support: what will people need to know and do for effective implementation, and (4) Evidence: what will serve as the products for progress monitoring and strategy attainment.*
Key Performance Indicator (KPI)	*A **Key Performance Indicator (KPI)** is a measurable value that demonstrates how effectively a company is achieving **goals and strategies**. Organizations use **KPIs** at multiple levels to evaluate their success at reaching targets.*

Activity One: Update the Strategic Foundation or Preferred Future Based on Stakeholder Feedback

Preferred Future Statement Component	Revisions Based on Vision Retreat Themes
Mission	
Vision	
Core Values	

Activity Two: Reflect on the homework articles read. Identify key concepts the plan team can use as it identifies long-range goals and key strategies to set direction

Article	Notes
Working Smarter Not Harder	
Defining Excellence	
What are Key Performance Measures	
Redefining Student Success	

<u>Activity Three:</u> Update the district's long-range goals.

STRATEGIC GOALS: The final pillar of the foundation asks members to clarify the specific goals they hope to achieve as a result of their improvement initiative. The goals pillar identifies the targets and timelines that enable a staff to answer the question, *"How will we know if all of this is making a difference?"* Goals provide a sense of priorities and the steps to achieve the benchmarks.

Effective goals foster both the results orientation and the individual and collective accountability for achieving the results. They help close the gap between the current reality and where the organization hopes to move performance to a higher level (the shared vision). Goals must have a results-orientation.

A goal tells us what we want to achieve.   A strategy tells us what we might do differently to see if we can achieve the goal. A goal is s **"WHAT"!**   A strategy is a **"HOW"!**

(adapted from DuFour, DuFour, Eaker, and Many, *Learning By Doing,* Second Edition: Solution-Tree, 2010)

Criteria for evaluating a goal statement:

- Does it manifest our mission and vision?
- Is it specific and strategic?
- Is it measurable?
- Is it actionable and aligned?
- Is it results-oriented?
- Is it time bound and target-oriented?
- Will it guide with work of school improvement?
- Will it guide the work of team/department and classroom improvement?
- Can it be aligned to leader and employee performance goals?
- Will it provide a data system to monitor and report performance at all levels

Examples of Strategic Goals:

- ✓ Ensure college and career readiness for ALL students.

- ✓ Ensure maximum development, growth, and achievement for all students.

- ✓ Engage families and the community as vital partners in the education process.

- ✓ Provide a rigorous, relevant, engaging and satisfying learning environment.

- ✓ Provide a productive, safe, and supportive learning environment.

- ✓ Develop shared responsibility and accountability through a partnership among and between school, home, and the community.

- ✓ Integrate technology effectively and efficiently to enhance teaching and learning.

- ✓ Align resources to accomplish priorities within a balanced budget.

✓ Ensure students are college and career ready.

✓ Engage families and the community as vital partners in the education process.

✓ Cultivate a positive and productive working environment that attracts, develops and retains high quality staff.

✓ Demonstrate effective and efficient business operations and ensure excellent stewardship of public resources.

✓ Ensure a productive and satisfying climate for learning and teaching.

✓ Attract, develop, and retain a high quality, diverse, and accountable workforce.

✓ Demonstrate effective and efficient business operations and ensure excellent stewardship of public money.

Reminder: The difference between a goal and a strategy is . . .

Goal: What we want to achieve and if we achieve all goals we will fulfill our mission and vision.

Strategy: What is most urgent for us to address and do differently to achieve our goals. While a strategy is aligned directly to a goal, a strategy may have impact on more than one goal. Action plans will be developed following strategic planning for all strategies.

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SUGGESTED GOALS	DRAFT OF STRATEGIC LONG-RANGE GOALS ALIGNED TO THEMES BASED ON SWOT AND PREFERRED FUTURE STATEMENT
GOAL ONE: Student Growth and Achievement	<u>DRAFT GOAL ONE:</u> *We will provide a rigorous education for all students to ensure they are life, career, and college ready.* *Make it better.*
GOAL TWO: Work Environment	<u>DRAFT GOAL TWO:</u> *We will foster a continuous improvement culture through a safe, nurturing, innovative learning environment.* *Make it better.*
GOAL THREE: Work Environment	**DRAFT GOAL THREE:** *We will foster a continuous improvement culture through high performing, collaborative teams.* *Make it better.*
GOAL FOUR: Family and Community Connections	**DRAFT GOAL FOUR:** *We will engage families and our community to partner in ensuring all students' success.* *Make it better.*
GOAL FIVE: Resources	**DRAFT GOAL FIVE:** *We will ensure effective and efficient use of our resources to people, time, and money* *Make it better.*

VISION RETREAT: FINAL S.W.O.T.

Strengths: What do we consider to be our strengths? What advantages do we have? What do others say our strengths are?

- **Solid Financial Standing**
- **Improved Culture & Climate**
- **Increased Student Academic Growth**
- **Updated Curriculum & Resources**
- **Inclusion – "All Means All"**
- **Bilingualism**
- **Gold Standard Preschool**
- **Student Attendance**
- **Decreased Suspensions**
- **Dedicated and Committed Teachers & Staff**

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?

- **Diversity, Retention of Staff**
- **Student Academic Attainment/ Close Achievement Gap**
- **Parent Engagement**
- **Current Technology Access**
- **Student Behavior**
- **Facilities/Space Needs**
- **Student Truancies & Tardiness**
- **Playgrounds & Recess**
- **Class Size (Too Large)**
- **Teacher Team-building/Attendance**

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?

- **Instruction/Curriculum Improvements**
- **Increased Parent Engagement** (teacher-parent communication, parent training)
- **Technology Opportunities**
- **Playgrounds & Recess**
- **Student Emotional Well-being**
- **Community Partnerships & Support**
- **Further PLC Development/ Refinement**
- **Staff Diversity**
- **Preschool Expansion**
- **More Specials – Music, Art, etc.**

Threats: Who or what threatens us the most? What challenges are coming that we must respond to? What might block our progress?

- **Politics & State Finances**
- **Challenging Home Environments**
- **State & Federal Mandates**
- **Aging, Landlocked Facilities**
- **Stigmas Toward Staff & Parents**
- **Teacher Recruitment & Retention**
- **Gap Between Student Attainment Levels and State Expectations**

Activity Four: Preview and provide feedback on possible indicators/measures to be used to measure, progress monitor and report performance.

STRATEGIC PLAN GOALS	POSSIBLE INDICATORS/MEASURES
DRAFT GOAL ONE: *Student Growth and Achievement*	- Percentage of students meeting or exceeding state standards in reading and mathematics according to state assessment. - Percentage of students meeting their annual growth targets in reading and mathematics according to NWEA MAP. - Students achieve learning standards/outcomes as defined by the district in all core curricular areas according to report cards. - District academic performance is at or above the state average according to the Illinois Report Card. - Achievement gap closes according to NWEA MAP.
DRAFT GOAL TWO: *Learning Environment*	- Student Attendance: Improves over time (measured daily/weekly/monthly and reported out by school - action plans) - School environment: Improves over time (Measured by school walk-throughs and checklists) - Student Engagement: Improves over time. (Measured by culture/climate surveys and walk-throughs) - Students participate in Co-Curricular Activities: This is our baseline year- measuring in Power School. This will be measured annually by actual student participation numbers. - Career pathway course sequence: Enrollment with a written plan beginning in grade 7 (Vir
DRAFT GOAL THREE: *Work Environment*	- Leader and Staff Retention: Improves over time (Measured by ISBE) - Staff demonstrates continued learning (university or in-district approved workshops, coursework, professional development) - Staff Attendance: improves over time (Measured by Frontline AESOP) - Staff Performance: Improves over time (Measured by Talent-Ed evaluations) - Staff Work Satisfaction: Professionally Engaging Place to Work (Measured by staff District S
DRAFT GOAL FOUR: *Family and Community Connections*	- Parent Satisfaction: Improves over time (5 essentials Survey) - Community Satisfaction: Improves over time (5 essentials Survey and/or District Survey) - Opportunities for family engagement increase over time (Measured by participation in Distr
DRAFT GOAL FIVE: *Resources*	- State Rating: Recognition status - Balanced Budget: Revenues exceed expenditures - Facilities are safe, clean and well-maintained (measured by school and district walk through tools, School Dude completion records) - Ten-year Life Safety Plan in on schedule - Maintain a good Credit Rating with Standard & Poor's - Technology Plan (timeline) is on schedule

Activity Five: Identify the most urgent strategies for action.

Strategies: Strategies are the actions that are required to guide plans to move the organization from where it is to where it wants to be. ***Strategies are gaps that currently are not yielding the results that are necessary and if addressed would present the most probable return on the investment of time, people and other resources.*** Strategies must be ***few in number and comprehensive in action***.

Strategies are identified by the strategic plan team at the district level but are turned over to action plan teams who are best qualified and certified to identify how the organization will go about closing the gaps. Action planning must follow the Plan-Do-Study-Act process to ensure consistency in approach and quality in research-based practice.

A goal is what we hope to achieve. A strategy is something we are going to do differently to achieve the goal.

(adapted from DuFour, DuFour, Eaker, and Many, **Learning By Doing,** Second Edition: Solution-Tree, 2010)

Criteria for evaluating a strategy statement and related SMART Action plan:

- Is it an urgent gap or need that must be addressed to achieve our goals?
- It is supported by data and information from stakeholders?
- Is it a mandate that must be accomplished within a timeframe that demands we do it now?
- Is it a high priority?
- Is there buy in and ownership from stakeholders as to the urgency for our alignment of time, money and people resources?
- Do we know what had been done in the past to address this strategy that has not worked?
- Do we know what is required to do this strategy differently?
- Can this strategy be measured and progress monitored?
- Will it guide the work of school and district improvement?

Examples of Strategy Ideas:

- ✓ Engaging, Motivating, and Challenging Educational Program
- ✓ Inquiry-Based Learning; Problem-based Learning
- ✓ STEM or STREAM
- ✓ Technology Integration
- ✓ Aligned, Articulated Curriculum and Assessment
- ✓ High Impact Instruction; Differentiated Professional Development
- ✓ Standards Based Reporting
- ✓ Student Responsibility for Their Own Learning
- ✓ High-Quality Interventions and Enrichments
- ✓ Data Driven Decision Making: Goals, Measures, Targets, Progress Monitoring and Reporting
- ✓ Collaboration and Teaming for Continuous Improvement; Professional Communities of Practice
- ✓ Master Facilities Plan: Life Safety & Universal Access
- ✓ Social Emotional Learning

HOLDOVER STRATEGIES TO BE COMPLETED FROM 2013 PLAN:

Identifying the Most Urgent Strategies that Need Attention for the District to Realize Its Mission, Vision and Goals in the Next Five Years

Long Range GOALS	DRAFT OF NEW STRATEGIES BASED ON SWOT AND PREFERRED FUTURE STATEMENT
Student Growth and Achievement	
Learning Environment	
Work Environment	
Family and Community Partnerships	
Resources	

Reminder:

**Final Meeting of Plan Team is on May 16 from 8:30 –
11:30 am**