

# 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

<b>Goal</b>	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?”
<b>Strategy</b>	Strategies are the actions required to guide plans to move the organization from where it is to where it wants to be. <i>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.</i> Strategies must be <i>few in number and comprehensive in action.</i>
<b>Indicator</b>	<i>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.</i>
<b>Measure</b>	<i>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.</i>
<b>Target</b>	<i>Targets are short term incremental steps measuring growth toward the Goal. Targets are set for each measure. Goals without targets lack power and usefulness.</i>
<b>Action Plan</b>	<i>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.</i>
<b>Key Performance Indicator (KPI)</b>	<i>A <b>Key Performance Indicator</b> is a measurable value that demonstrates how effectively a company is achieving <b>goals and strategies</b>. . Organizations use <b>KPIs</b> at multiple levels to evaluate their success at reaching targets.</i>

**Activity One: Update the Strategic Foundation or Preferred Future Based on Stakeholder Feedback. Consider stakeholder feedback and continue to work on your Preferred Future Statement. Use the Findings of the Vision Retreat documents to see summary of concepts and ideas from our last session.**

<b>Components</b>	<b>Reflections for changing the Preferred Futures Statement</b>
<b>Mission</b>	
<b>Vision</b>	

<b>Core Values</b>	
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## **Activity Two Part A: Review current long-range themes/goals. Consider revisions 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 a **“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.
- ✓ Align resources to accomplish priorities within a balanced budget.
- ✓ 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.

<b>Current Goals</b>	<b>Suggested Revisions</b>
<b>GOAL: STUDENT GROWTH &amp; ACHIEVEMENT</b> - Ensure continuous development, growth and achievement for all students.	
<b>GOAL: LEARNING ENVIRONMENT</b> - Cultivate a positive learning environment that meets the physical, academic, and social-emotional needs of every student.	
<b>GOAL: HIGH QUALITY WORKFORCE</b> - Recruit, develop, support and retain a high-performing and diverse staff that practices collaboration and pursues continuous improvement.	
<b>GOAL: FAMILY AND COMMUNITY PARTNERSHIP</b> – We will foster partnerships and shared responsibility between schools, families and the	

community to enrich the lives of all stakeholders.	
<b>GOAL: RESOURCES</b> – We will continue to demonstrate effective and efficient business operations and ensure excellent stewardship of public resources	

**Activity Two Part B: Learn about what makes a goal SMART and the importance of Key Performance Measures and Targets. Discuss Tools for Schools: Work Smarter Not Harder.**

SMART	KPIs	Targets
S		
M		
A		
R		
T		

**Activity Two Part C: Provide feedback on POSSIBLE goal Key Performance Indicators/Measures to be used to measure progress**

**monitor, and report performance on the long-range goals. Discuss Redefining Ready. Discuss Evidence Base for How We Learn. Understand the importance of Defining Student Success.**

Current Goals	Suggested Revisions
<b>GOAL: STUDENT GROWTH &amp; ACHIEVEMENT</b> - Ensure continuous development, growth and achievement for all students.	<ul style="list-style-type: none"> <li>➤ <b>Students are Early Learning ready</b> <ul style="list-style-type: none"> <li>○ Students demonstrate readiness for Kindergarten.</li> <li>○ Students demonstrate readiness for First Grade.</li> </ul> </li> <li>➤ <b>Students are 3<sup>rd</sup> Grade ready</b> <ul style="list-style-type: none"> <li>○ Students read on grade level by the end of second grade.</li> <li>○ Students achieve annual growth targets in reading and mathematics.</li> <li>○ Achievement gaps are closing.</li> </ul> </li> <li>➤ <b>Students are Middle School ready</b> <ul style="list-style-type: none"> <li>○ Students meet or exceed middle school readiness scores in reading and mathematics. (MAP)</li> <li>○ Students achieve annual growth targets in reading and mathematics.</li> <li>○ Students achieve learning standards/outcomes as defined by the district in all core curricular areas (forthcoming)</li> <li>○ Achievement gaps continue to close.</li> <li>○ Student enrollment in honors courses in middle school increases over time.</li> </ul> </li> <li>➤ <b>Students are High School ready</b> <ul style="list-style-type: none"> <li>○ Students meet or exceed high school readiness scores in reading and mathematics.</li> <li>○ Students are placed in on-track high school courses.</li> </ul> </li> <li>➤ <b>Student Achievement and Growth Compares Favorably with Benchmark Districts</b></li> </ul>
<b>GOAL: LEARNING ENVIRONMENT</b> - Cultivate a positive learning environment that meets the physical, academic, and social-emotional needs of every student.	<ul style="list-style-type: none"> <li>➤ <b>Climate and Culture:</b> <ul style="list-style-type: none"> <li>○ Maintain class size ranges as per District guidelines.</li> <li>○ Student attendance improves over time.</li> <li>○ Student disciplinary infraction rates improve over time.</li> <li>○ Student participation in extra-curricular/athletic activities improves over time.</li> <li>○ Student learning engagement improves over time.</li> </ul> </li> <li>➤ <b>Student Perceptions:</b> <ul style="list-style-type: none"> <li>○ Student survey perception data improves over time (5 Essentials, IAB Survey).</li> </ul> </li> <li>➤ <b>Student Social and Emotional Support:</b> <ul style="list-style-type: none"> <li>○ Identified SEL climate indicators improve over time.</li> </ul> </li> </ul>
<b>GOAL: HIGH QUALITY WORKFORCE</b> - Recruit, develop, support and retain a high-performing and diverse staff that practices collaboration and pursues continuous improvement.	<ul style="list-style-type: none"> <li>➤ <b>Climate and Culture</b> <ul style="list-style-type: none"> <li>○ Staff attendance improves over time.</li> <li>○ Staff retention improves over time.</li> </ul> </li> <li>➤ <b>Staff Satisfaction</b> <ul style="list-style-type: none"> <li>○ Staff survey perception data improves over time (5 Essentials, IAB Survey).</li> </ul> </li> <li>➤ <b>Professional Development and Other Support</b> <ul style="list-style-type: none"> <li>○ Staff licensure continues to meet highly qualified designation.</li> <li>○ Staff Bilingual Certification increases over time.</li> <li>○ Teacher leadership opportunities increase over time.</li> <li>○ Professional Development surveys - all indicators reflect positive feedback.</li> </ul> </li> <li>➤ <b>Strategic Planning</b> <ul style="list-style-type: none"> <li>○ Goal Progress - all indicators document growth and/or improvement.</li> <li>○ Action plans document progress in an authentic manner.</li> <li>○ District departments/grade levels meet or exceed student performance targets, as defined.</li> </ul> </li> </ul>

<p><b>GOAL: FAMILY AND COMMUNITY PARTNERSHIP –</b> We will foster partnerships and shared responsibility between schools, families and the community to enrich the lives of all stakeholders.</p>	<ul style="list-style-type: none"> <li>➤ <b>Family Satisfaction</b> <ul style="list-style-type: none"> <li>○ Family survey perception data improve over time (5 Essentials, IAB Survey).</li> </ul> </li> <li>➤ <b>Community Satisfaction</b> <ul style="list-style-type: none"> <li>○ Community perception data improve over time (measure yet to be identified).</li> </ul> </li> <li>➤ <b>Partnerships with Community Agencies, Businesses, etc.</b> <ul style="list-style-type: none"> <li>○ Service learning opportunities increase over time.</li> <li>○ Collaboration efforts with community partners increase over time.</li> </ul> </li> </ul>
<p><b>GOAL: RESOURCES –</b> We will continue to demonstrate effective and efficient business operations and ensure excellent stewardship of public resources</p>	<ul style="list-style-type: none"> <li>➤ <b>Facilities</b> <ul style="list-style-type: none"> <li>○ Capacity and utilization is equitable and optimal.</li> <li>○ Life-Safety requirements addressed on schedule.</li> <li>○ Facility data shows building satisfaction with safety, maintenance, cleanliness, and maintenance team responsiveness.</li> <li>○ Facility Plan remains on schedule.</li> </ul> </li> <li>➤ <b>Technology</b> <ul style="list-style-type: none"> <li>○ 1 : 1 initiative maintains effective instructional focus.</li> <li>○ Internet bandwidth and wireless network remains viable and responsive.</li> <li>○ Help-Desk data indicate quick and responsive assistance.</li> </ul> </li> <li>➤ <b>Finances</b> <ul style="list-style-type: none"> <li>○ State Financial Profile Designation remains strong over time.</li> <li>○ No significant findings identified in annual audit.</li> <li>○ Rate of fund balance expenditure monitored closely by Board and administration, and communicated to community on a regular basis.</li> <li>○ EAV per pupil and Tax Rate compare favorably with benchmark districts.</li> <li>○ 5 Year financial forecast is known by stakeholders.</li> </ul> </li> </ul>

### **Activity Three: Discuss the difference between a goal and a strategy. Learn about College, Career, and Life Readiness Standards. View examples of goals and aligned strategies.**

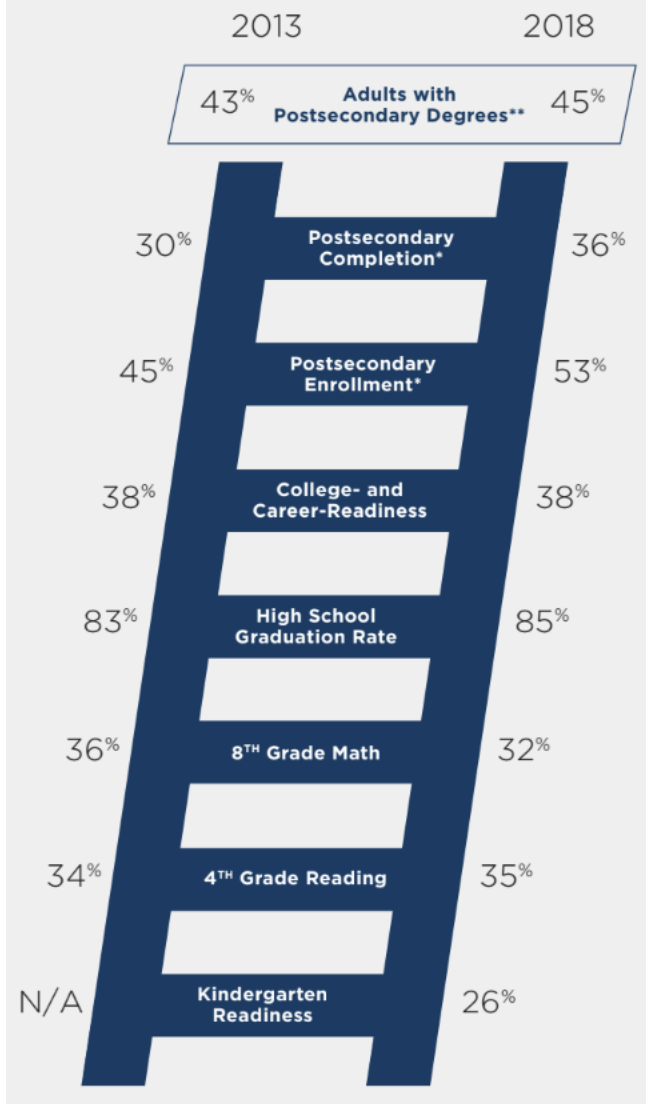
**Reminder:** The difference between a goal and a strategy is . . .

**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.

### WHERE ILLINOIS NEEDS TO GO BY 2025

Illinois aims to ensure that 60 percent of adults attain a postsecondary degree or credential by 2025.





## Activity Four Part A: Reflect on SWOT analysis and Preferred Future Statement to identify 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:

- ✓ Equity
- ✓ Student Agency: Voice, Choice, ownership of learning
- ✓ Inquiry-Based Learning; Problem-based Learning
- ✓ STEM or STREAM
- ✓ Community perception/satisfaction
- ✓ Staff engagement, professional development, collaboration
- ✓ Technology Integration
- ✓ Aligned, Articulated Curriculum and Assessment
- ✓ High Impact Instruction; Differentiated Professional Development
- ✓ 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
- ✓ Limited Resources

Long Range GOALS	DRAFT OF NEW STRATEGIES BASED ON SWOT AND PREFERRED FUTURE STATEMENT
<b>GOAL: STUDENT GROWTH &amp; ACHIEVEMENT</b> - Ensure continuous development, growth and achievement for all students.	
<b>GOAL: LEARNING ENVIRONMENT</b> - Cultivate a positive learning environment that meets the physical, academic, and social-emotional needs of every student.	
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**Activity Four Part B: Summary of most frequently identified strategies:**

**Reminder:**

**The Final Meeting of the Strategic Plan Team is on March 5**

**A draft of the plan will be sent out for stakeholder feedback between now and that meeting.**

**On March 5 the team will review all feedback and make final refinements to the draft of the plan. The plan will then be readied for Board approval.**