Design Workbook
Spring Branch Independent School District
Strategic Planning 2015/2016
DESIGN THINKING OVERVIEW
Design thinking is a human-centered approach to designing systems and solutions that focus (as an end result) on the needs of people. The process aims to “unlearn” in an effort to more effectively consider the utilization of resources and the possibilities of technology within new designs for products, processes or environments. Design Thinking focuses first on empathy (needs of the human subject) and defining the current and ideal states. Once defined, the process pushes ideation by first focusing on quantity and narrowing efforts through quality. At the core of this process is a bias towards action and creation: by creating and testing something, you can continue to learn and improve upon your initial ideas.

EMPATHIZE

Empathy is the centerpiece to this human-centered design process.

The Empathize Phase seeks first to understand the needs of the stakeholder(s). Design teams seek to unlearn; forcing detachment (as best as possible) from the current context, views and biases that exist within the schema of every member. Through this work to better understand people, team members seek context through observation, collective study and discussion. As a result, members/teams will be able to use observations to better define both the current and ideal states of a given theme.

WHY Empathize?
In design, the matters that an individual is working to improve upon are rarely exclusive to that designer. Most often, these opportunities in need of improvement are particular group of people. In order to design for them, the designer (or team) must gain empathy for the needs of that group without allowing their context, views or biases to alter the manner in which they are observing.

For example, a principal may observe a student in a classroom regardless of the impact on the student, they may view a lesson as highly successful given their context of best practices. However, in utilizing that context, they may miss that the student they are observing became unengaged after the first fifteen minutes due to the length of time they were required to sit and listen.

Because our minds automatically filter out a lot of information without our even realizing it, designers need to learn to see things “with a fresh set of eyes” as if viewing an experience for the first time.
Observing what people do and how they interact with their environment gives the designer clues about what they think, feel and need. By watching people, the designer can capture physical manifestations of their experiences – what they do and say. This allows the designer to infer the intangible meaning of those experiences in order to uncover insights that will provide direction to create innovative solutions.

**Design Team Member Specifics:**
- **Objective:** Gather and consider all available and relevant data including quantitative data (numbers-based) and qualitative (observations, interviews, focus groups, etc.).
- **Role:** “Detective” – Teammates serve as impartial investigators researching quantitative and qualitative data points to better understand the current context of their specified theme.

**Deliverables and Timeline:**
The Empathize Phase begins with our Design Teams Kickoff on December 1st and spans the next two weeks, through December 18th. Teams will meet for the first time to develop team norms, roles and a calendar of regular meetings. Team members will consider what data points are needed to better understand the current state of their specified focus area. Some members may gather quantifiable data while others may observe stakeholders in various settings.

*To be completed by December 18th*
*Please see templates in design workbook*
- Teams meet to develop norms, roles and calendar of regular meetings.
- Teams collectively develop answers to key questions related to specific theme.
- Team members complete observation.
- Team members review Cross-Functional Team Summary.
- Team members review engagement meeting data.

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**DEFINE**

The Define Phase brings clarity and focus to the design space.

This distinct but important phase provides the designer (or team) the chance and responsibility to define both the challenge and the optimal state.

Design Teams will:
- Use previous observations (qualitative data) and all available quantitative data to define the current state of the theme.
- Work collaboratively to clearly define the ideal or optimal state.
- Highlight internal “bright spots” and external “exemplars” that help inform and stretch their work going forward.
- Use these collective insights, to jumpstart the Ideate Phase by brainstorming and narrowing lists of perceived barriers and core actions.
WHY Define?
The Define Phase is critical as it results in several actionable statements that inform the Ideate Phase. By defining both the current and optimal states of the organization, designers are better able to see the Point A to Point B connection they will work to design for in the coming ideation phase. By specifically naming an ideal/optimal state, the design team sets an expectations bar for which they will collectively hold themselves accountable.

Design Team Member Specifics:
- **Objective:** Provide clarity and focus to each specified theme by defining the current state, the ideal state, and other details that will guide ideation.
- **Role:** “Forensic Scientist” – Teammates work to consider the gathered evidence to define key elements of their specific theme.

Deliverables and Timeline:
In analyzing data gathered during the Empathize Phase, teams collectively define the below elements related to their theme.
- **Current State:** A summary of our current performance, strengths and needs within this area. This summary includes a list of internal “Bright Spots.”
- **Ideal State:** A vivid description of the personalized environment intended as a target for all students or stakeholders.
- **Exemplars:** A list of exemplars for consideration and study is generated.
- **Key Actions:** A list of key actions that need to be prioritized in order to drive the organization towards the ideal state within this theme.
- **Barriers:** A list of current/expected barriers specific to education code or the foundational structure of the organization.

*Deliverables Due January 13th*
*Please see templates in chapter three of the design workbook*
- Send Define Deliverables Worksheet (see workbook) to Bailey Hampton (bailey.hampton@springbranchisd.com)

**IDEATE**

The Ideate Phase is when the team begins to concentrate efforts solely on idea generation.

Ideation begins by “going wide” – considering any and all ideas specific to moving the organization towards the ideal state. As the process moves along, the teams begins to prioritize, eliminate and timeline efforts and initiatives into a specific pathway.

WHY Ideate?
Ideation transitions the team from identifying problems to creating solutions. Ideation provides the opportunity to combine team members’ understanding of the problem with their collective imagination to generate solution concepts. Particularly early in a design phase, ideation is about pushing for a widest possible range of ideas from which you can select, not simply finding a
single, best solution. Through both individualized and collective ideation, teams achieve the following:

- Step beyond obvious solutions and thus increase the innovation potential of your solution set
- Harness the collective perspectives and strengths of your teams
- Uncover unexpected areas of exploration
- Create fluency (volume) and flexibility (variety) in innovative options
- Get obvious solutions out of heads (and on paper first) in an effort to drive the team beyond standard responses and ideas.

**Design Team Member Specifics:**

- **Objective:** Ideas, ideas, ideas – Quantity is first step in the ideate process as teams ideate personalized solutions related to their specified theme. Teams will later categorize and begin to further define areas of consideration as process continues.
- **Role:** “Inventor” – Teammates serve as creative problem solvers working to brainstorm as many ideas (solutions) as possible. When filtered and coupled together, these ideas will serve as the springboard for the efforts, initiatives and projects of their forthcoming pathway. *Remember: Invent with the user in mind.*

**Deliverables and Timeline:**

- Teams brainstorm and produce numerous ideas, focusing on quantity over quality
- Teams briefly consider barriers that may require HB1842 exemptions
- Teams consider subcommittee feedback and direction in sorting ideas into definable categories for further consideration and development.

**Deliverables Due January 29th**

*Please see templates in chapter four of the design workbook*

- Send Ideation Update (see workbook) to Bailey Hampton
  (bailey.hampton@springbranchisd.com)

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**SCALE**

In the scale phase, teams begin to align, shed and scale ideas to develop clear, concise initiatives.

These initiatives are “steps” along the pathway that teams design to move the district from its current state to the defined ideal state. As initiatives are developed, teams will add detail including expected step-by-step particulars for future consideration. In addition, teams will:

- Holistically consider scale linking initiatives together into a defined pathway.
- Define expected HB1842 related exemptions based on current barriers versus needed innovations.
- Consider and name progress markers to serve as public, transparent indicators for successful progress.

**WHY Scale?**
Working to scale pulls disparate ideas together into distinct initiatives (solutions). This step focuses the work towards a definable product for public consideration. Initiatives are holistically considered to develop a clear, concise pathway designed to guide the district towards the intended ideal state.

**Design Team Member Specifics:**
- **Objective:** Teams filter ideas to align and/or shed for scale. As definable initiatives are developed, teams add detail including HB1842 related exemptions.
- **Role:** “Designer” – Teammates take existing resources (ideas) and begin to design cohesive initiatives. As associated efforts, initiatives and projects are designed, teammates add detail and define needed exemptions through HB1842. *Remember: Design with the user in mind.*

**Deliverables and Timeline:**
Teams will:
- Name and outline individual initiatives
- Link named initiatives into a definable pathway
- By initiative, name expected HB1842 exemptions
- Name and define interim measures (both qualitative and quantitative) that can be used to gauge expected progress.

*Deliverables Due February 5th*
*Please see templates in chapter five of the design workbook*
- Send Define Deliverables Worksheet (see workbook) to Bailey Hampton (bailey.hampton@springbranchisd.com)

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**REVISE & PRIORITIZE**

It is likely that the entire Design team will not be utilized as our strategic planning process moves from “design” to “construct.” Furthermore, as specific pathway elements are initiated, it is likely that former Design Team members will flow on and off of project-specific teams that will be brought together to focus on specific initiatives.

The final phase of our design work will focus on two key deliverables:
1) **Plan Revisions:** A small subgroup of the larger Design Team will remain intact to consider feedback and possible revisions in advance of votes by the DIT and Board of Trustees in March.
2) **100 Day Cycles:** In advance of the 2016/2017 school year and in alignment with our annual budget process, Design Teams will consider which (if any) pathway elements need to be resourced and implemented within the coming school year. As initiatives are considered, prototyping will become an invaluable practice as the district continually learns in an effort to develop more impactful, personalized solutions to our students and families.

**Design Team Member Specifics:**
• **Objective:** As the final draft of the strategic plan is considered, feedback and revisions will become an important part of completing a high-quality plan. As the plan is finalized (March), teams will shift their focus from planning to construction by specifically considering the two 100 Day Cycles associated with the 2016/2017 school year.

• **Role:** “Analyst” – Teammates will serve as careful analysts considering the feedback and direction of the Strategic Planning Committee to improve sections of the plan.

**Deliverables and Timeline:**
Revisions based on feedback are likely and will be the only specific deliverable associated with this phase of our design process. As relevant, other deliverables will be initiative specific and associated with the development of our 2016/2017 budget.

*If applicable, final revisions are due February 19th*

• Please send any revisions to Bailey Hampton ([bailey.hampton@springbranchisd.com](mailto:bailey.hampton@springbranchisd.com))

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**Timeline & Deliverables (By Phase):**

<table>
<thead>
<tr>
<th>Phase</th>
<th>Dates</th>
<th>Deliverables</th>
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| **EMPATHY PHASE** | December 1st through December 18th | o Design Teams meet for first time  
o Teams develop norms, roles and calendar of regular meetings  
o Teams consider key questions specific to theme  
o Team members collect/review relevant data  
o Team members review Cross-Functional Team Summary  
o Team members review engagement meeting data  
| | **December 10th:** December Strategic Planning Committee Meeting | - Subcommittee members provided an update on team roster, roles, etc.  
- Subcommittee reviews relevant data by theme  
- Subcommittee members provide feedback on current/ideal states, key actions and barriers. |
| **DEFINE PHASE** | January 4th through January 13th | o Current State: A summary of our current performance, strengths and needs within this area. This summary includes a list of internal “Bright Spots.”  
o Ideal State: A vivid description of the personalized environment intended as a target for all students or stakeholders.  
o Exemplars: A list of exemplars for consideration and study is generated.  
o Key Actions: A list of key actions that need to be prioritized in order to drive the organization towards the ideal state within this theme.  
o Barriers: A list of current/expected barriers specific to education code or the foundational structure of the organization.  
| | **January 13th** | – Submit Definition Phase Worksheet (specifics defined above) |
**IDEATE PHASE**

- **January 14th through January 29th**
  **IDEATE Phase**
  - Teams will begin by brainstorming a myriad of ideas, suspending judgment to ensure that every idea is considered (quantity over quality)
  - Teams briefly consider barriers that may require HB1842 exemptions
  - Teams consider subcommittee feedback and direction in sorting ideas into definable categories for further consideration and development.
    - **January 14th**: January Strategic Planning Committee Meeting
      - Subcommittee members presented an update on final Define Phase deliverables
      - Subcommittee members presented HB1842 update based on identified barriers
      - Subcommittee members provide direction on initiatives for consideration
    - **January 29th**: Submit Ideation Update (workbook)

- **January 30th through February 5th**
  **SCALE Phase**
  - Teams prioritize and begin to eliminate ideas, pushing existing efforts into an actionable, prioritized pathway of efforts and initiatives.
  - Teams further define areas of expected exemption (HB1842)
  - **February 5th**: Submit final-draft of pathways

- **February 6th through March 4th**
  **REVISE & PRIORITIZE Phase**
  - Teams consider community feedback (public posting February 20th – March 21st)
  - Teams review formal plan text for clarity and potential revisions
    - **February 18th**: February Strategic Planning Committee Meeting
      - Subcommittee members presented an update on draft pathways and HB1842 considerations (areas of expected exemption)
      - Subcommittee members provide direction on final revisions
    - **February 19th**: (If Applicable) Submit Revisions
    - **February 20th** (Saturday): Plan posted publically for 30 days
<table>
<thead>
<tr>
<th>Timeline</th>
<th>Actions &amp; Deliverables</th>
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<tbody>
<tr>
<td>December 10th, 2015</td>
<td>December Strategic Planning Committee Meeting at 6:00pm</td>
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<tr>
<td>December 18th, 2015</td>
<td><strong>Actions:</strong></td>
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<td>- Teams meet for the first time.</td>
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<td>- Teams develop norms, roles and calendar of regular meetings</td>
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<td>- Team gather/consider relevant data</td>
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<td>- Team members review Cross-Functional Team Summary</td>
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<td>- Team members review engagement meeting data</td>
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<td>November 18th, 2015</td>
<td><strong>Empathize Phase</strong></td>
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<td>January 13th, 2016</td>
<td><strong>Deliverables:</strong></td>
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<td>- Send Define Deliverables Worksheet (see workbook) to Bailey Hampton</td>
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<td>(<a href="mailto:bailey.hampton@springbranchisd.com">bailey.hampton@springbranchisd.com</a>)</td>
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<td>- Send Final-Draft of Pathways (see workbook) to Bailey Hampton</td>
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<tr>
<td>February 20th, 2016</td>
<td>Strategic Plan posted publically for 30 days prior to 3/21 Board of Trustees Meeting</td>
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<td>March (TBD)</td>
<td>District Improvement Team (DIT) considers final vote (majority vote)</td>
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<tr>
<td>March 21st, 2016</td>
<td>Board of Trustees consider final vote (two-thirds vote)</td>
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EMPATHIZE PHASE

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- Page 13: Information, Norms and Roles
- Page 15: Information, Key Questions
- Page 16: Executive Summary, Cross-Functional Teams
NORMS & ROLES
Design Teams Worksheet

What are Norms?
In a professional learning community (design teams for example), norms represent collective commitments established and agreed upon by every member. Norms come from within the team and serve as collaborative protocols for how the team will work together. In order for a team to consider norms, they must commit to a shared goals (or set of goals) and establish that they will meet regularly. Once these foundational expectations are established, norms and roles should be considered to guide collectively agreed upon working commitments.

A Strategy for Establishing Design Team Norms:
To begin, teammates should consider traits associated with particularly positive and negative working conditions (most effective and least effective team experiences). Once members have fully considered specific behaviors that lead to highly effective working conditions, collectively establish a small set of norms that will guide the team’s collective work. Norms may number from three to five but should not exceed seven.

Tips for Establishing Design Team Norms:
- Begin by allowing each member to think of two to three individual norms that they believe should govern their personal work on this team.
- In considering team norms, please consider crafting a norm that encourages thinkers who may be more “disruptive” in nature (http://www.powerofpositivedeviance.com/), the required autonomy to positively challenge or build upon another member’s work.
- Every whole group meeting should begin with a collective review of team objective(s), and agreed-upon norms.
- Allowing team members to assess the teams adherence to norms should be considered (as an exit ticket) at least once during the design process. This will allow the lead to better understand whether or not the team believes that it is functioning at an optimal level.
- Violations of norms must be addressed. Repeated violations call for the consideration of dismissing the individual and replacing them with a more collaborative designer.

Role Development:
Effective learning teams conduct efficient, productive meetings. As noted above, collective goals/objectives and agreed upon norms are important foundational structures. However, in a high-pressure, design-oriented environment with deadlines, clear roles are often helpful to ensure that designated members are driving the team forward. While roles are optional, the following list might be worth considering when structuring team participation.

- **Lead**: Leads have already been established for each design team. Leads drive the collective work of the team, develop agendas, force hard but required conversations and are responsible for innovative outcomes.
- **Manager**: The manager is responsible for keeping the team on time and on task. When conversations become something other than productive—drifting from the agenda or focusing on something inconsistent from the stated objectives, the manager is
responsible for polite redirection. The manager effectively runs whole group meetings which allows the lead(s) to more effectively listen. The manager should be someone that is largely trusted and respected for the quality and integrity of their work.

- **Recorder:** The recorder should be someone who is naturally more engaged when they are taking detailed notes. The recorder is easily one of the most important members of the team as they record each team’s collective thoughts, ideas and agreed upon decisions. For consistency, the recorder should probably be a permanent position.

- **Technician:** While it is great to have multiple teammates with a high level of proficiency in areas related to technology, it is helpful to have one designated person who is responsible for setting-up and breaking-down any needed technology (laptops, projectors, etc.). In addition, this person can play a key role in setting-up any document sharing sites that may help the team better communicate as their design process develops.

- **Motivator:** Every team needs a person who consistently researches and sends articles, websites, videos, etc. that further the collective thought and understanding of team members. The motivator commits to consistent, related research (outside of meetings) that will help stretch the thoughts and ideas of the team. They will regularly send the team information to consider as designers seek to further their understanding of clients, environments, innovations, barriers, etc.
Key Questions
Design Teams Worksheet

In defining the collective work of a design team, key questions will be continuously asked to ensure consistency, focus, purpose and alignment. As part of our design process in Spring Branch ISD, we have selected four fairly basic but meaningful questions that each team must collectively answer as their work together begins.

The four key questions focus specifically on the client, the intended outcome, needed resources and required supports. The questions differ slightly by theme but adhere to the same basic structure and meaning. Examples by theme are listed below. However, design teams are encouraged to consider and alter their questions as needed in an effort to enhance meaning, focus and relevance.

What?
- Learning Ecosystem: What do students need to learn?
- Extraordinary People: What do our employees need in order to effectively and consistently develop as professionals?
- Customized Supports: What non-classroom factors most positively impact a student’s learning?

How?
- Learning Ecosystem: How do our students need to learn?
- Extraordinary People: How do professional best improve and grow in their profession?
- Customized Supports: How do students (or families) most effectively access support personnel and systems?

Resources?
- Learning Ecosystem: What resources do our students need in order to individually learn at their highest levels?
- Extraordinary People: What resources are most valuable to the growth of our employees as professionals?
- Customized Supports: What resources systems best sustain our most impactful support personnel and systems?

Supports?
- Learning Ecosystem: What supports must be provided to students throughout their learning to ensure optimal learning outcomes?
- Extraordinary People: What supports to professionals require in order to develop into highly effective practitioners?
- Customized Supports: What supports are consistently most impactful (and least impactful) for students and families? What supports are currently most in need?
EXECUTIVE SUMMARY

SPRING BRANCH ISD CROSS FUNCTIONAL TEAMS

BACKGROUND

In January 2011, SBISD undertook development of the Spring Branch Plan 2012-2017 (Plan). An eighteen month process began with a visioning task force of more than 80 SBISD staff, students, community members, parents and the Board of Trustees. A series of community and staff feedback loops followed and led to refinement of the district goal and underlying belief statements. Following Board approval, the Plan and its ambitious Spring Branch T-2-4 (T24) goal was launched in July 2012.

Over the next year, district leaders focused on communicating about and building support for T24, a “moonshot” goal, that challenges the entire Spring Branch community to work together to double the number of our graduates who attain a technical certification or military training, or a two- or four-year degree.

At the same time, the district focused on finalizing the critical and secondary measures and drafting an internal accountability plan to assess our progress toward T24 at the campus and district levels.

Five strategic focus areas were identified as critical to achieving T24, and in October 2013, the SBISD Board of Trustees approved a Chartering Document to establish five Cross Functional Teams (CFTs) to study, analyze and action plan in support of each strategic area. The district senior staff serves as the executive steering committee for the process.

CROSS FUNCTIONAL TEAMS

In November, 2013, approximately 100 SBISD leaders from across the system’s academic, campus and operational areas convened to launch the CFTs. The CFTs were charged with using a study team process to design, implement, monitor and evaluate both urgent and foundational activities along the five strategic work streams that would honor the district legacy yet stretch the system to reimagine and reinvent, where necessary, so that EVERY SBISD student achieves T24.

The five CFT’s were:

- Leadership Pipeline
- Teacher Development and Evaluation
- Driving Results
- Spring Branch To and Through
- Culture

Throughout the 2014 spring semester, CFTs met at least weekly, to (1) Identify the problem(s) to solve, (2) conduct data analysis, (3) identify solutions, (4) prioritize solutions, and (5) develop work plans that highlight use of resources, timing and decision making roles, responsibilities, milestones, communications plans, and expected outcomes. CFTs were expected to focus first on those initiatives that have the highest potential impact, with the greatest ease of implementation.
LEADERSHIP PIPELINE

PURPOSE
To build a leadership pipeline from Teacher Leader through Superintendent. This will strengthen existing leadership capacity throughout the system and also create a transparent career path based on competence.

ORIGINAL SCOPE

1. Define clear competence-based "T-2-4 Leadership" roles and responsibilities from Teacher Leader through Superintendent. This includes standardizing leadership roles whenever possible, clarifying the competence necessary to succeed in those roles, and standardizing job descriptions wherever possible to maximize the potential for leadership development.

2. Create, adapt or adopt and then implement a coherent leadership identification and development strategy that helps teams, schools, and the district identify leaders with potential as well as develop them as effectively and efficiently as possible. The process for leadership identification will occur at regular intervals and will help SBISD identify the relative strengths and weaknesses of its leadership "bench." In addition to leadership identification, this strategy will also include clarity related to what individuals must do to grow and develop themselves; what teams and schools are responsible for developing through job responsibilities and "stretch" roles; the role SBISD will play in leadership development; and, what leadership development SBISD will rely on strategic partners (e.g. REEP, UH Teach2Lead) to provide.

3. Create, adapt, or adopt systems of support and resources aligned to the SBISD leadership competency model as well as the roles and responsibilities throughout the system. This could include coursework, a leadership toolkit, and even a revised mentoring or coaching strategy.

IDENTIFIED PROBLEM STATEMENTS

1. The district lacks a clear articulation of core competencies and job descriptions that support the roles and responsibilities for all leadership positions within the pipeline.

2. The district lacks a disciplined, clearly defined process for the identification and selection of future SBISD leaders that is aligned to competencies articulated in the leadership competency model.

3. Spring Branch lacks a defined system to develop and grow leaders across the pipeline aligned to the leadership competency model. The defined system of support and resources needs intentional alignment to the leadership competency model and should address: a, skills pertinent to each position; b, transparency of opportunities and succession; c, immediate and ongoing feedback.

4. Spring Branch needs to better articulate leadership expectations and create a thoughtful leadership evaluation and support system that is tied to student and teacher performance and to continuous improvement of the campus.

SUMMARY OF QUALITATIVE & QUANTITATIVE DATA

Quantitative
- Over the last 5 school years, SBISD has hired an average of 6 Principal positions per year
- Over the last 5 school years, SBISD has hired an average of 11.4 Assistant Principal (AP) positions
per year

- In 2012, 35% of Principals had never worked in SBISD before being hired into that role (in last 3 years that % has dropped to 25%); an additional 11% had not served in the AP role prior to becoming a Principal; as a result, there is no easily explainable step-by-step career path
- In 2012, 27% of APs had never worked in SBISD before being hired into that role (in last 3 years that % has dropped to 13%); an additional 41% were hired as APs from various non-teaching roles into the role of AP; as a result, there is no easily explainable step-by-step career path

Qualitative Trends (Gathered during 2012-13 school year)
- “People who don’t perform stay in their leadership roles too long.”
- “What got us here won’t get us to T-2-4.”
- “Lots of leaders stay for a long time. Some change roles, but I don’t know why they’re in new role they’re in.”
- “I never learned how to manage other people when I stepped into the role I am in right now.”
- “In Spring Branch, things come and go; we don’t stay focused on any approach.”
- “Sometimes it’s what you know. Sometimes it’s who you know.”
- “The hiring processes are unclear.” “The hiring processes change.”
- “I don’t get feedback on my interviews; I end up in a pool but don’t know what I need to work on to be promoted.”
- “We’ve done some things in the past to develop leaders, but we really don’t develop our AP’s or Team Leaders much at all.”
- “I don’t know what I have to do to get promoted. I don’t know what my next step could be.”
- “Several different divisions own leadership.”

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<tr>
<th>PRIORITIZED SOLUTIONS &amp; STATUS UPDATE</th>
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<tbody>
<tr>
<td><strong>Solution</strong></td>
</tr>
<tr>
<td>1 Revised Principal selection process</td>
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<td>aligned to Competency Model</td>
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<tr>
<td>2 Revised Assistant Principal</td>
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<td>screening process</td>
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<td>aligned to Competency Model</td>
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<td>3 Revised Principal recruitment</td>
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<td>strategy</td>
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<td>4 Revised Principal Evaluation process</td>
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<td>5 Non-campus administrators</td>
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<td>integrated into Leadership Pipeline</td>
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### Completed leadership competency rubrics for every level of the Leadership Pipeline

- An early prototype of a database is complete
- 1st draft complete of how student performance might be integrated into a holistic talent review of leadership
- 1st draft complete of processes that could be used to complete a holistic talent review
- 1st draft complete of how student performance might be integrated into a holistic talent review of leadership

### Completed talent identification system (aka Holistic Talent Review) to assess leadership bench

- 1st draft complete of how student performance might be integrated into a holistic talent review of leadership
- 1st draft complete of processes that could be used to complete a holistic talent review
- 1st draft complete of how student performance might be integrated into a holistic talent review of leadership

### Completed Leadership Development Plan

- 1:1 leadership coaching for Principals piloted in 2013-14, scaled to all Principals in 2014-15, and continued in 2015-16
- Instruction coaching training offered to ~60 employees
- Project Management delivered to 81 employees

### 3 new leadership development programs integrated (1:1 coaching, UH coaching, project management)

- 1:1 leadership coaching for Principals piloted in 2013-14, scaled to all Principals in 2014-15, and continued in 2015-16
- Instruction coaching training offered to ~60 employees
- Project Management delivered to 81 employees

### SIGNIFICANT LEARNINGS TO INFORM STRATEGIC PLANNING

- There is an extensive appetite for leadership development in the system. (e.g. over 200 leaders trained between 2013-2015 in opt-in trainings)
- Leadership skills as well as managerial skills need to be developed.
- Building a healthy and robust internal talent pipeline is mission critical. The focus for development must extend beyond just the upper levels (e.g. Principal). To build a healthy internal pipeline, efforts must be in place to develop earlier career professionals, too.
- It’s not enough to rely on a limited amount of ongoing information about leadership competence at all levels. To make great decisions about leadership, SBISD must strengthen the quantitative and qualitative information used to assess leadership competence at all leadership levels.
- Systems (e.g. recruitment, selection, development, evaluation, career pathing) must be aligned to the SBISD competency model.
- The overwhelming majority of how SBISD invests in leadership is through salaries and how people spend their time. Providing opportunities for people to learn and grow while on the job and through ongoing, regular coaching and feedback must be prioritized.
- Leadership needs clear ownership. Ownership does not mean that a single department or division is responsible for implementing systems and processes. Instead, that single department or division owns the design and implementation of content, programming, new processes, or other systems that might then be implemented by other departments.
DRIVING RESULTS

PURPOSE
To identify and articulate a philosophy for governance that balances school and classroom autonomy with centralized expectations for quality and alignment. In addition, the Team will align any systems and processes necessary throughout the system to that governance philosophy in order to achieve the Spring Branch T-2-4 goal in a sustainable way.

ORIGINAL SCOPE

1. Create, adapt, or adopt a management philosophy and strategy (e.g. Performance Management) that ensures regular feedback (both positive and adjusting) is happening at all levels of the system to maximize development and accountability throughout.
2. Create, adapt, or adopt any curriculum, resources, training, or other support systems necessary to ensure centralized quality control while also empowering schools and classrooms with a level of autonomy that aligns with the SBISD governance philosophy.
3. Create, adapt, or adopt and then implement assessments or assessment strategies that reliably measure the height and breadth of expectations. These could include common assessments that measure academic expectations, and these could also include systems that assess teams, schools, or systems.
4. Design and implement a strategy that fosters research and development as well as a culture of sharing so that effective practices used throughout the system are shared and so that the individuals closest to the work are helping and supporting each other.
5. Create, adapt, or adopt and then implement a system of developmental accountability and evaluation that clarifies the height and breadth of: a, performance expectations; b, growth targets.

IDENTIFIED PROBLEM STATEMENTS

1. SBISD lacks a cohesive process for strategic planning that builds the capacity of the school leader, and aligns the district’s and campuses’ approach to using data, goals and human capital to achieve T-2-4.
2. SBISD lacks a clearly defined and transparent plan for holding leaders accountable for the academic performance of their campuses and providing development opportunities for principals based on school data.
3. SBISD needs a highly effective process of recruiting, selecting, on-board, and evaluating new teachers. This work must be followed by a rigorous decision-making process for awarding term contracts to probationary teachers.

SUMMARY OF QUALITATIVE & QUANTITATIVE DATA

Quantitative
- District Texas Academic Performance Reports (TAPR)
- District Internal Accountability System (IAS)
- District T-2-4 results, 5 Critical Measures & Service First Measures
- Campus 3-year goals
- Analysis (using Pivot Tables) of locally-administered and state-required assessments
Qualitative

- Surveyed principals on CIP process; analyzed CIP’s from other districts, other states, and charter management organizations; researched the legal compliance; reviewed internal CIP documents
- Principal survey indicated that they didn’t have a defined process of accountability for results based on the CIP.
- Focus Group held with teachers related to assessments that elicited the following conclusions:
  - We have too much testing, especially state mandated
  - Teachers spend too much time on test prep and test administration, resulting in less instructional time
  - Data not available in a timely manner for effective follow-thru for positive student outcomes
  - Not enough training for interpreting test results
  - Campuses have mixed results when it comes to student outcomes
- Surveyed 1st and 2nd year teachers about their recruitment/hiring experience into SBISD

<table>
<thead>
<tr>
<th>PRIORITIZED SOLUTIONS &amp; STATUS UPDATE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Solutions</strong></td>
</tr>
<tr>
<td>Build out and operationalize SBISD Operating Cycle</td>
</tr>
<tr>
<td>Create and implement a coherent strategic planning process for campuses that aligns 3-year and 1-year goals with 3-year, 1-year, and quarterly expectations for learning outcomes</td>
</tr>
<tr>
<td>Look more closely at the Teacher Recruitment &amp; Selection band on the Operating Cycle</td>
</tr>
<tr>
<td>Select an academic indicator and consider conducting an Academic Return on Investment (A-ROI) analysis.</td>
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</tbody>
</table>

**SIGNIFICANT LEARNINGS TO INFORM STRATEGIC PLANNING**

- Lack of alignment in critical functions (data reviews, improvement planning, budgeting, staffing, hiring, etc.) across district departments and campuses limits our ability to be strategic and coordinated in our efforts for efficiency and effectiveness.
- Cross-functional thinking is an affective antidote to our lack on alignment. When a cross-functional group came together to think though the alignment problems, finding places to improve the alignment were obvious. The challenge is to systemize the coordination. The
Operating Cycle is a good start, but without regular attention, planning in isolation and misalignment will return.

- Departments and campuses need to have long-term strategic goal setting and planning to guide their one-year improvement planning efforts. Our former practice of planning only one year at a time and valuing only one-year goals led to short-term practices that did not always benefit our collective goal of T-2-4.

- We lack a collective commitment and process to evaluating our academic programs. The result is decision-making based on anecdotal information and broad student achievement data. In an environment of high expectations and limited resources, a more structured approach to program analysis is needed.

- In a highly competitive teacher hiring environment and our limited ability to be competitive in the salary compensation market, we must explore opportunities to improve our recruitment/hiring/retention practices to build the strongest possible teaching staff.
TEACHER DEVELOPMENT & EVALUATION

PURPOSE
To develop outstanding teachers in Spring Branch ISD who are motivated and committed to helping the district achieve its Spring Branch T-2-4 Goal. This Cross Functional Team will work closely with the District Improvement Team (DIT), which has decided to focus on the development of a new teacher appraisal system.

ORIGINAL SCOPE

1. Define and clarify excellent Spring Branch ISD teaching and learning.
2. Create a thematic Teacher Development Framework that can be used to house professional development modules in the district.
3. Work closely with the SBISD District Improvement Team to design a new teacher appraisal system that aligns with the Spring Branch T-2-4 goal, SBISD’s definition of excellent teaching and learning, and student growth and achievement metrics.
4. Create, adapt, or adopt instruments (e.g. rubrics) that can be used to measure and track teacher effectiveness in alignment with excellent "SBISD teaching and learning as well as expectations for student growth and achievement. This will help SBISD standardize key trainings.
5. Create, adapt, or adopt and then implement systems, tools, or processes that facilitate teacher sharing and collaboration. This could include revisions to the teacher calendar to increase opportunities for collaboration.
6. Create, adapt, or adopt processes that support teachers as they develop their professional skills in order to maximize their effectiveness.
7. Create, adapt, or adopt processes that align teacher recruitment, selection, and professional development to the definition of excellent SBISD teaching.

IDENTIFIED PROBLEM STATEMENTS

1. The current SBISD teacher evaluation instrument neither explicitly aligns to nor completely serves the 4 belief statements of T-2-4
2. Our current teacher evaluation instrument does not reflect a connection between student achievement and teacher performance. Our task becomes to identify/create a teacher evaluation instrument that includes an objective measure of the impact of the teacher on student achievement.
3. Since we know that teachers’ expectations can and do change the performance of their students, how do we ensure that SBISD teachers have the right expectations?
4. After identifying and creating a teacher evaluation instrument, a plan must be developed to pilot the instrument and to provide training to all stakeholders involved.

SUMMARY OF QUALITATIVE & QUANTITATIVE DATA

Quantitative
- To help build thinking around data section of evaluation
  o EVAAS data
  o STAAR/EOC
  o TELPAS
- DRA/EDL, Math Perspectives

- Correlation analysis of teacher appraisal scores with student and campus performance indices, including SBISD internal accountability system

- Gather and analyze multi-year student performance data from state and national districts that have implemented a “value added” measure into formal teacher evaluation. Identify trends and isolate variables in these data to determine a continuum of more and less effective/reliable measures of teacher effectiveness.

- Identify and analyze SBISD performance gaps and patterns of performance gaps over time.

Qualitative
- District Improvement Team leading every aspect of the new evaluation instrument
- Focus groups and surveys with teachers
- Input gathered from Principals

**PRIORITIZED SOLUTIONS & STATUS UPDATE**

<table>
<thead>
<tr>
<th></th>
<th>Solutions</th>
<th>Status</th>
</tr>
</thead>
</table>
| 1 | Design and implement new rubric that is more specific and easier for teachers and administrators to use | - Rubric develop and piloted using new forms  
- Training developed and complete, including videos, student “look fors” and anything else that needs to be developed |
| 2 | Develop elements of effective instruction                                 | Tabled                                                                |
| 3 | Create a new evaluation system                                           | - Completed  
- New evaluation system currently being piloted on select campuses  
- Digital interface for new system built |
| 4 | Integrate data into the new evaluation process                           | - In progress  
- Phase-in plan developed and approved by DIT  
- Pilot with EVAAS data in 2015-2016 |

**SIGNIFICANT LEARNINGS TO INFORM STRATEGIC PLANNING**

- Focus groups with teachers is a useful way to gather qualitative data about the experience and wishes of a larger section of the workforce

- Systems and processes must allow for personalization and differentiation among personnel. Differentiation and personalization are needed within our professional development platform, too, because everyone has unique patterns and timing for growth.

- Stakeholders desire an appraisal process that promotes conversations between teachers and appraisers that direct a professional development path.

- Teachers want less paperwork and more conversations as part of the performance management in the system.

- Teachers are comfortable being held accountable to student performance; they simply want the information used to be a fair and credible depiction of their students’ performance.
TO AND THROUGH

PURPOSE

To increase the percentage of students enrolled in and completing some form of higher education after graduating from SBISD so that the district can achieve the Spring Branch T-2-4 goal.

ORIGINAL SCOPE

1. Identify and prioritize all obstacles that inhibit students from enrolling in and completing higher education.
2. Create, adopt, or adapt and then implement systems that address the biggest obstacles preventing students from enrolling in and completing higher education.
3. Identify roles and responsibilities within the system to address those obstacles proactively. Create, reinvent, and/or repurpose existing roles if necessary to ensure the obstacles are eliminated.
4. Develop effective analytical systems that track longitudinal student performance to better inform the SBISD system on how students perform after their PreK-12 experience so that adjustments can be made.
5. Engage with researchers throughout the country to study in depth any area that SBISD does not have the expertise to study yet (e.g. "non-cognitive" research) that might help increase the percentage of students who enroll in or complete some form of higher education.
6. Identify and engage with any strategic partners that can provide strong guidance and support in this work. (e.g. YES Prep, KIPP, higher education)

IDENTIFIED PROBLEM STATEMENTS

AWARENESS

Problem Statement/s
1. Students are uncertain of their strengths and interests and how they translate into successful post-secondary training and completion.

ACCESS

Problem Statement/s
1. We lack systems that guarantee all children attend the school that best matches their interests and strengths while providing the best possible chance for successful completion.
2. Students don't know the nuts and bolts of the admissions and financial aid processes and fail to persevere when confronted with obstacles.

TRANSITION

Problem Statement/s
1. Many students do not successfully transition to post-secondary education because they cannot advocate for themselves and/or do not have a safety net of relationships and resources.
2. Despite their intentions upon graduation, students who have been accepted to higher education fail to show up (e.g. "Summer Melt")

CONNECTIVITY

Problem Statement/s
1. Students lack an understanding of how to access and build a culture of support for themselves.

Design Workbook 26
2. Students lack a comprehensive understanding of how to navigate and access resources within the system they plan to enter.

INDEPENDENCE

Problem Statement/s
1. Students lack the hard and soft skills needed to succeed, and they don't know how to succeed regardless of relative strengths and weaknesses
2. Guardians/Parents lack the skills and knowledge to support the development of their child’s independence

STAYING POWER

Problem Statement/s
1. Students do not understand how to handle and overcome difficult academic and personal situations both independently and with all available resources
2. Students lack the ability to advocate for themselves in all aspects of their life - career, academic, and personal - to achieve their desired goals

SUMMARY OF QUALITATIVE & QUANTITATIVE DATA

<table>
<thead>
<tr>
<th></th>
<th>% Students Immediately Enrolled Fall After High School</th>
<th>% Student Enrolled within First Year After High School</th>
<th>Retention from year 1 to 2</th>
<th>% of Class of 2004 who successfully completed T, M, 2-year, or 4-year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Memorial HS</td>
<td>84%</td>
<td>87%</td>
<td>94%</td>
<td>68%</td>
</tr>
<tr>
<td>Northbrook HS</td>
<td>33%</td>
<td>41%</td>
<td>77%</td>
<td>10%</td>
</tr>
<tr>
<td>Stratford HS</td>
<td>77%</td>
<td>77%</td>
<td>91%</td>
<td>60%</td>
</tr>
<tr>
<td>Spring Woods HS</td>
<td>44%</td>
<td>53%</td>
<td>86%</td>
<td>25%</td>
</tr>
<tr>
<td>Westchester Academy</td>
<td>77%</td>
<td>73%</td>
<td>90%</td>
<td>31%</td>
</tr>
</tbody>
</table>

These themes emerged during a focus group with approximately 25 SBISD alumni:
- A substantial percentage of high school students lack the requisite knowledge and skills to navigate the postsecondary landscape. This is particularly challenging for students who lack proper citizenship documentation.
- Students who are not on an AP or IB track are directly or indirectly sent the message that they are not “college material.” The in-class expectations in “Academic classes” are lower, compliance with what the teacher says is expected, and rarely is homework given or expected.
- The postsecondary experience is particularly hard when the expectations in high school were not rigorous.
- There is a big switch from high school to postsecondary related to digital expectations; by postsecondary, online assessments and online coursework is common, whereas in high school it isn’t.
- Building awareness about every possible option for every child should start earlier.

PRIORITIZED SOLUTIONS & STATUS UPDATE

<table>
<thead>
<tr>
<th>Prioritized Solution</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interest Inventories implemented at ES (5th grade), MS, and HS</td>
<td>We are now administering interest inventories at the middle and high school levels. We are</td>
</tr>
</tbody>
</table>

1 This is the cohort of students used to set the original T-2-4 goal of doubling from 36% to 72%
not administering these at the elementary level yet.

Each high school set a numerical Summer Melt goal and developed a plan to achieve that goal. When National Student Clearinghouse data arrives in late Oct/Nov, we will know how each campus did. Plans that worked better than others can then be studied, and sharing can occur to improve outcomes the following year.

This was discussed at a Board Workshop but not steps were taken.

A working group was formed to figure out the best way to teach to mastery a defined set of knowledge and skills that every child in high school must master. This working group stopped meeting during the transition in Superintendent. Each campus is addressing this knowledge and these skills differently.

Rather than propose a Board policy, Meningitis booster shots were offered to students through a traveling van service in Spring 2015, with 58.4% of the district vaccinated. The van will continue in Spring 2016. In addition, shots are offered at college nights in Fall 2015.

This was never discussed by the Board.

30/40:1 is tracked informally. The other data points are tracked formally within the To and Through department.

SBISD became a TSI testing site during the 2014-15 school year.

SIGNIFICANT LEARNINGS TO INFORM STRATEGIC PLANNING

- The work required to achieve “to and through” requires leadership (e.g. Executive Director of To and Through) and a focused team.
- Identifying the right new metrics to track (e.g. % of Juniors with “short list” by May 1, % of Seniors completing FAFSA/TAFSA by May 1) leads to significant and meaningful changes in practice.
- The culture and practices of holding high expectations for every child’s postsecondary success vary across campuses; in addition, these vary between “Academic” and “AP” tracks within each campus.
- Sometimes challenges such as Meningitis booster can be addressed without changes in policy.
- There are elements of the work required to increase the % of children who matriculate To and Through higher education that must be considered and addressed earlier than high school.
• There are children at every high school with similar struggles.
• Although SBISD invests heavily (e.g. time, money, other resources) in post-secondary efforts as a system, there is wide variability in how much time, money, and resources are across campuses in these investments; in addition, there is a lack of coherence and coordination.
CULTURE

PURPOSE
To reinvent, change, or evolve culture at every level throughout SBISD to align with the Spring Branch T-2-4 goal, the Spring Branch T-2-4 belief statements, and an articulated governance philosophy that balances school and classroom autonomy with centralized expectations for quality and the PreK-12 student experience.

ORIGINAL SCOPE

1. Define any "non-negotiable" expectations for T-2-4 Culture throughout SBISD so that leaders have clarity about how much autonomy they have when building and maintaining strong cultures throughout the system.
2. Evaluate and recommend effective "brand identity" resources, templates, or other tools that help foster and sustain T-2-4 culture.
3. Revise strategic planning, improvement planning, recruitment, selection, development, and evaluation to align with and incorporate T-2-4 Culture. (e.g. Nuts & Bolts, CIP's)
4. Create, adopt, or adapt a system or process to measure accurately, reliably, and regularly the health of culture throughout SBISD.
5. Create, adapt, or adopt systems and resources that support SBISD employees in their ability to build and sustain strong cultures. These could include coursework, training during new-hire on-boarding, a culture toolkit, or any other support measures to help improve culture.

IDENTIFIED PROBLEM STATEMENTS

1. SBISD has neither defined nor articulated a core set of organizational values that, together with our belief statements, undergird and inform all aspects of district operations.
2. SBISD does not have a strategy for measuring/assessing organizational culture and taking informed action (based on assessment) to assure movement in the right direction.
3. We are not unified as a culture around the desired results.

SUMMARY OF QUALITATIVE & QUANTITATIVE DATA

To identify key aspects of strong organizational culture that drive sustained high performance, the Culture Team studied myriad organizations across multiple industries (e.g. Rackspace, BHP Billiton), read case studies, conducted Skype interviews and developed a common vernacular through a book study of Culture Eats Strategy for Lunch. To arrive at this problem statement, the team assessed members’ perceptions of desired results for the system, and affirmed that even among us, there were many and varied answers to the question, "What are the results we are trying to achieve?" Culture Team members who are part of the Driving Results CFT shared feedback of the conversations around results.

Systematically, we believe that everyone can articulate T-2-4, but cannot necessarily articulate their exact role in attaining T-2-4, or the underlying results necessary to achieve it. All research pointed to the need for articulated organizational values to be developed and embedded throughout the system.

In January 2015, staff, students and parents were invited to share opinions on each proposed value through the two-week “Jammin in January” campaign: The SBISD Values Jam: One Goal. One Family. One
**set of Core Values.** Launched with district-wide communications, PSAs, social media, and strategic messaging to build excitement, Ideascale was used for internal audiences, while a Survey Monkey survey was used to engage students and parents. Focus groups engaged 100+ operations staff without computer access for direct conversation in English and Spanish.

The Culture Team aimed for 25% participation from all audiences (based on participation rates of the IBM Jam) and meaningful comments from 50% of participants. Actual participation included 3000+ Ideascale Values “Votes” from 543 participants (about 20% of employees with computers), nearly 300 survey responses, 100 focus group participants and 15 pages of comments.

**PRIORITIZED SOLUTIONS & STATUS UPDATE**

<table>
<thead>
<tr>
<th></th>
<th>Prioritized Solution</th>
<th>Status</th>
</tr>
</thead>
</table>
| 1 | Board Approved Core Values Statements by February                                     | – An extensive bottom-up process of gathering input from 10% of the workforce was conducted using online crowdsourcing (using Ideascale)  
– A 2-week “Jammin in January” campaign  
– 5 Core Values were approved by the Board of Trustees |
| 2 | Communications Plan and deliverables that fall inside that plan (e.g. videos, website) by Winter Break | – The messaging at Convocation 2015-16 was focused around the Core Values. Principals integrated Core Values into their staff adult learning/PD. A significant number of Core Values-themed items (e.g. lanyards, posters, desktop, banners on the administration building) have been developed and shared throughout the system.  
– “Every Child Commitment completed by all staff across system as unifier  
– Teacher On-Boarding for new teachers included segment on district brand, beliefs and core values for first time ever.  
– I am SBISD Campaign developed to launch in January, 2016 updating employee, volunteer and student recognitions to align with Core Values.  
– New Signage on front of Schaper Leadership Center  
– Baseline Survey of Core Values embedded in Superintendent Look, Listen and Learn Survey answered by 2,000+ stakeholders  
– Board Policy AE Local updated in April |
Identification of 3 highest impact activities where we can change processes, or activities, to align to values and an action plan for doing so

See above

SIGNIFICANT LEARNINGS TO INFORM STRATEGIC PLANNING

- Extensive internal and external research helps to identify key themes for focus.
- Crowdsourcing is an effective way to gather community input, build buy-in, and provide insights into what is and isn’t clear.
- A sequential and coherent communications plan is helpful to create and sustain momentum toward change.
- Shared vocabulary and language within and among participants is critical.
- Diverse voices create better outcomes.
- “Go slow to go fast.”
- Clear, Simple, Sticky Messaging, Branding, Stories to Connect to Big Ideas and Support from the Top is Critical (Convocation).
- Feedback loops throughout the process engaging broader audiences helps build support for ideas.
- Targeted, measurable outcomes help drive the work.
- It helps for facilitator to have go-to person to provide honest feedback for how the group is progressing.
- Every meeting should have clear purpose and intended outcomes.