

Data Retreat Participant Handout

Data Retreat Purpose

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

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

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

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

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

Common Vocabulary

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

Agenda for Strategic Planning Data Retreat

*Location: Park Place Banquets
406 West Woodstock Street
Crystal Lake, IL 60014
Date: September 12, 2018
Time: 8:30 am - 3:30 pm*

Outcome	Activity	Facilitator/ Time
Review who we are and what we are here to do. Essential Question: Where are we now?	Welcome Review who is in the room.	Superintendent Steve Olson 15 MIN. 8:30 am - 8:45 am
Review the strategic planning process. Learn the purpose of today's Data Retreat. Essential Question: How does today's work fit into the strategic plan "Big Picture?"	Understand the Big Picture of the strategic planning process and the role of the plan team. Set outcomes for the Data Retreat. Begin with the END in mind.	CEC Facilitator Perry Soldwedel 15 MIN. 8:45 am - 9:00 am
Activity One: Review our perceptions about what is going well in the district and what our greatest challenges are for the future. To learn about others perceptions. Essential Question: What are our perceptions about what is going well in the district and needs to be continued and celebrated as well as what is not going well and needs attention?	Identify plan team member perceptions of district strengths and opportunities for improvement. Share perceptions. Review stakeholder perceptions- advice to the plan team. (Environmental Scan Data, 5Essentials Satisfaction Survey Data), Other district perception data. Share perceptions.	CEC Facilitator Bhvana Sharma-Lewis 40 MIN. 9:00 am - 9:40 am Director of Communications Shannon Podzimek 5 MIN. 9:40 am - 9:45 am CEC Facilitator Perry Soldwedel 35 MIN. 9:45 am – 10:20 am
BREAK		10 MIN. 10:20 am - 10:30 am
Activity Two: Paint a data picture that describes the current state of the district as to what is going well and what are the challenges ahead. Reports include District State Report Card Summary Information along with important data the district collects to report its progress. Essential Question: What does the district data tell us? What does trend, cohort, subgroup, and comparative data tell us?	Team will rotate through three, 40-minute reports given by district leaders. Hear reports related to: <ul style="list-style-type: none"> • Student Growth and Achievement • Culture: Learning and Working Environment • Resources: Finance, Facilities and Technology Reports will share status of current goals through key indicators/ measures. <ul style="list-style-type: none"> • Where possible, report will summarize trend and comparative data. • Where possible report will summarize progress toward district targets. 	CEC Facilitator District Leaders 135 MIN. Three rotating reports 10:30 am - 11:15 am 11:15 am - 12:00 pm Lunch 12:00 pm - 12:45 pm

LUNCH		45 MIN. 12:00 pm - 12:45 pm
(Activity Two continued) Process learning's from reports: Analyze the key data indicators to determine what are strengths and what are opportunities for improvement.	Teams will identify key findings from reports: <ul style="list-style-type: none"> •What does the data tell you? •What is there to celebrate? •What is there to consider for improvement? •What data is missing? Teams will share with one another their findings.	Third Rotation 12:45 pm - 1:30 pm CEC Facilitator Perry Soldwedel Processing 45 MIN. 1:30 pm - 2:15 pm
Activity Three: Conduct a SWOT analysis <ul style="list-style-type: none"> • <i>Strengths</i> • <i>Weaknesses</i> • <i>Opportunities</i> • <i>Threats</i> 	Identify our Strengths, our Weaknesses, our Opportunities and our Threats.	CEC Facilitator Perry Soldwedel 45 MIN. 2:15 pm - 3:00 pm Gallery Walk 15 MIN. 3:00 pm - 3:15 pm
Set the stage for the Visioning Retreat.	Discuss role of team members in sharing the learning from the Data Retreat with constituent groups. Preview the Vision Retreat. Reflect on the Day. Appreciations	CEC Facilitator Perry Soldwedel 10 MIN. 3:15 pm - 3:25 pm Superintendent Steve Olson Wrap Up 5 MIN. 3:25 pm - 3:30 pm
Adjourn		3:30 pm

ACTIVITY ONE: OUR PERCEPTIONS

What are we MOST PROUD about?

What are our GREATEST CHALLENGES for the Future?

ACTIVITY ONE: OTHERS' PERCEPTIONS

What are stakeholders MOST PROUD about?

What do stakeholders perceive as our GREATEST CHALLENGES?

ACTIVITY TWO DATA REPORT: STUDENT ACHIEVEMENT RESULTS

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

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ACTIVITY TWO DATA REPORT: LEARNING AND WORK ENVIRONMENTS

What did you learn about the learning and work environments that informs how the DISTRICT is performing? Performing compared to others? Performing compared to the past?

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ACTIVITY TWO DATA REPORT: FINANCES and FACILITIES

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

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Analysis of the Information from the Data Reports

<i>Reports</i>	<i>Going Well; Needs to be Celebrated</i>	<i>Could be better; Is a Possible Opportunity for Improvement</i>
<i>Student Achievement Report</i>		
<i>Learning and Work Environment Report</i>		
<i>Finance and Facilities Report</i>		

ACTIVITY THREE: SWOT ANALYSIS

STRENGTHS: What are we most proud of? What do we consider to be the results of our best work? What advantages do we have? What do others say about us in positive ways?

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WEAKNESSES: What are we not doing well? What are we most criticized for or receive the most complaints about? What do we seem to have a hard time doing well? What needs our immediate attention?

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OPPORTUNITIES: What opportunities for improvement do we know about, but have not addressed? With a little work, where could we change a weakness into a strength? What are we not doing currently that might be the opportunity for us to improve?

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THREATS: Who or what threatens us the most? What challenges are coming that we must respond to? What might block our progress? What do we have little control over that might impact our resources?

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