

Consortium for Educational Change's Strategic Planning Process



Steps in the Process	Description
Readiness	The purpose of the Readiness/Introduction Session is to acquaint the district with the strategic planning process. It is essential in alignment with CEC's mission that the process be a joint endeavor between labor and management and include leaders of the board, union and management. Leaders representative of those groups must attend the introduction session. This session will be facilitated by CEC.
Orientation	The purpose of the Orientation is to answer the question, "WHO ARE WE AND WHAT ARE WE BEING ASKED TO DO?" The Orientation session paints the "The Big Picture" of the strategic planning process so that all strategic planning team members have a shared understanding of the process and their roles and responsibilities in helping the district set clear direction for the future.
Environmental Scan; Data Retreat; SWOT Analysis	Prior to the Data Retreat, the district conducts an environmental scan to inform stakeholders about the process and inform them how they can be engaged. Th scan includes data and information about the perceptions of stakeholders and offers them an opportunity toThe purpose of the Data Retreat is to answer the question, "WHERE ARE WE NOW?" During this day the strategic planning team will develop a shared understanding of the current situation of the district as identified through data. The outcome of the day is to paint a clear data picture of the district so that the strategic planning team can identify what is working well (STRENGTHS), what is not working well (WEAKNESSES), what are possible areas of need (OPPORTUNITIES), and what are potential impacts (THREATS). This is called a SWOT analysis. This is a recommended six-hour session.
Vision Retreat; Preferred Future Statement	The purpose of the Visioning Retreat is to answer the question, "WHERE DO WE WANT TO BE?" During this day the strategic planning team will develop a shared understanding of the current mission, vision, values/beliefs/commitments and goals of the district. The team will review the components of a continuous improvement framework. It addition, it will look at essential information to shape a future vision based on the SWOT analysis from the data retreat. This provides the team with an opportunity to look at best practice research that guides improvement. The outcome of the day is to paint a clear vision of where the district hopes to be in the future. This is a recommended six-hour session.
Setting Direction Retreat; Draft of Plan	The purpose of the Setting Direction Retreat is to answer the question, "HOW DO WE GET FROM WHERE WE ARE TO WHERE WE WANT TO BE?" The strategic planning team works to provide a draft of the strategic vision/plan that can be shared with stakeholders to provide opportunities for input and feedback. The team will address long-range goals, preview goal indicators and measures and identify the most urgent strategies that need to be addressed during the plan's duration to move the district to a higher level of performance. This is a recommended six-hour session.
Refinement/ Recommendations Meeting	The purpose of the Final Meeting of the strategic plan team is to review feedback from stakeholders on the draft of the new plan and make any refinements to the plan before it is presented to the superintendent who will recommend plan approval to the board of education. This is a recommended three-hour session.
Strategy Action Plans	It is recommended that the district use a Plan-Do-Study-Act process to develop strategy action plans. Leaders of the action teams should be trained to ensure the PDSA process is used consistently. Be certain action plans are SMART. Align key action plans with district department leaders and shared decision-making committees. Be certain those impacted by the action plans have opportunities to provide into input to their design and development. Be certain the action plans identify tasks that are research-based and ensure action will be different from what has been done. Doing the same things produce the same results. Recognize the importance of "study" and "act" of the PDSA process.

Plan Approval; Living the Plan	<p>There are several critical strategies to be certain the plan does not sit on the shelf and collect dust: <u>Critical strategies that CEC offers to ensure the return on the investment includes:</u></p> <ol style="list-style-type: none"> 1. <i>Align goals and strategies to a data system (Indicators, Measures, and Targets).</i> 2. <i>Align the data system to a progress monitoring and reporting system for all stakeholders.</i> 3. <i>Align the plan to the work structures and processes to ensure ownership, responsibility and accountability.</i> 4. <i>Align the plan to individual and team performance and program evaluation (goal setting, feedback, reflection, and improvement).</i> 5. <i>Align the plan strategies to PDSA action plans to develop a two-way communication and collaboration system to listen and learn.</i> 6. <i>Align the plan to resources of time and money to ensure focus and priority.</i>
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Core Plan Team Membership Suggestions:

Stakeholder Group	Number	Suggested Selection
Board of Education	1	Board
Superintendent	1	Superintendent
Key members of the Superintendent's Cabinet	2-3	Superintendent
Parent/Community Leadership	2	Board
Union Leadership	2	Union(s)

The responsibilities of the core planning team members include:

- Be members of the strategic planning team and assume all responsibilities expected of team members.
- Attend an initial strategic planning meeting to finalize customization of the process for the district.
- Attend virtual 30-40 minute meetings one week prior to each meeting of the strategic plan team.
- Make decisions to finalize each agenda for the strategic planning team.
- Provide feedback related to the process to the facilitator(s).
- Attend a final meeting to learn of ways to live the plan. Others may be invited to this meeting.
- Assist the superintendent with the plan presentation to the Board of Education

Strategic Plan Team Membership Suggestions:

Stakeholder Group	Number	Suggested Selection
Board of Education	2	Board
Superintendent	1	Superintendent
Key members of the Superintendent's Cabinet	2-3	Superintendent
Building Leadership	2-3 per level: elementary, middle, high	Principals
Union Leadership	1 per organization (Certified staff, Support staff, etc.)	Union(s)
Parent Organization Leadership	1-2 from all Parent Organizations	Parent Council or Superintendent and Board
Family Representatives	1 per school or, depending on district size, 3-4 from elementary, 3-4 from middle, and 3-4 from high school	Parent Teacher Organization
Community Representatives	3-5	Superintendent and Board
School Representatives	1 per school or, depending on district size, 3-4 from elementary, 3-4 from middle, and 3-4 from high school	School Leadership Teams
Student Representatives in K-12 districts	6-8	Student Council

The responsibilities of the strategic planning team members include:

- Attend all meetings of the planning team.
- Learn of roles and responsibilities at an Orientation Meeting.
- Prepare for each meeting by reading materials aligned to each agenda.
- Conduct a data analysis of the district at a Data Retreat by reviewing key data indicators and measures to determine the district's strengths and opportunities for improvement.
- Develop a shared understanding of the needs of stakeholder groups through a review of an environmental scan or stakeholder satisfaction data at a Data Retreat.
- Explore educational, demographic, political, economic, social, and technological impacts on the future of the district at a Vision Retreat.
- Explore research-based, effective practices of high performing districts at a Vision Retreat.
- Review and revise the district's shared mission, vision, values/commitments and goals at a Vision Retreat.
- Provide suggestions for indicators and measures that align to monitoring and reporting district success at a Setting Direction Retreat.
- Identify key strategy gaps that are aligned to the data-based opportunities for improvement through a review of the environment scan and/or system assessment (internal audit)
- Present a draft of the plan for stakeholder review and input.
- Revise and finalize the draft of the plan based on stakeholder review and input.
- Recommend the strategic plan to the superintendent.
- Learn about the responsibilities to live the Plan.