Orientation Participant Handout

Orientation Purpose

The Orientation session seeks to answer the question, "Who are we and what are we being asked to do?" The Orientation session paints 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.

At the Orientation, team members will meet one another and the stakeholder group that each member of the team represents. Stakeholder groups include community members, families, students, certified staff, non-certified staff, management, board and union.

The Orientation session will include opportunities to learn about the current plan and the status of plan execution and results.

Common Vocabulary

Change management	A structured approach to transitioning individuals, teams and organizations from a current state to a desired future state.
Organizational alignment	The existence of a consistently clear understanding of the district's mission, vision and strategy throughout the entire organization. An aligned organization is one where everyone understands how what they do contributes to the aspirations of the organization and it is clear how departments, teams and employees interact to create value for the organization's customers and connect to the organization's vision.
Perspective	A view of the organization's strategic performance viewed through a particular lens. Typical perspectives include financial stewardship, customer service, internal processes and organization capacity for learning and growth.
Strategic Goal	The specific continuous improvement activities balanced across the perspectives, that break down strategy into components and make strategy actionable. The long-range goals that if accomplished will allow the district to fulfill its mission and vision. Goals must be specific, measurable, actionable, results-oriented and timely (SMART).
Strategy	The choices made and the actions taken, from many choices and actions that are potentially available to move the organization from its current state to some desirable future state--a "game plan" to address the top priorities that if accomplished will position the district to better achieve its mission, vision and goals.
Strategic Plan	The document used to communicate throughout an organization and to its stakeholders the organization's mission, vision, core values, goals and

	strategies. It sets "Big Picture" direction and focus, and helps the district align its resources of people, time and money to that direction.
Strategic Planning	An organizational management activity that is used to set priorities; focus energy and resources; strengthen operations; ensure that employees and other stakeholders are working toward common goals; establish agreement around intended outcomes/results and assess and adjust the organization's direction in response to a changing environment. Effective strategic planning articulates not only where an organization is going and the actions needed to make progress, but also how it will know if it is successful. The result of the planning process is a strategic plan.

An organization has two choices: Be intentional about the path the organization follows or turn on the organization's autopilot. If you are running your organization without a plan, you are just using the navigation system and not paying attention to how you are moving your organization to a higher level of performance. Strategic planning is not about taking on additional work; it is about taking all those numerous daily decisions and initiatives and making them part of an integrated focus system.

Strategic Planning is a continuous improvement process based on key questions:

Where are we now? (How would you describe what is working and what needs attention? What are the strengths, weaknesses, opportunities and threats as described by data, information and perceptions?)

- Mission statement
- Data Review
- SWOT (data analysis to identify strengths, weaknesses, opportunities and threats)

Where do we want to be? (What are your best hopes for the future? What do you want to be different 5-10 years from now compared to what it is currently? What is the preferred future?)

- Vision Statement
- Values statement/commitments
- Sustainable competitive advantage

How will you get from where you are to where you want to be? (What will everyone do differently to get improved results? What research-based strategies will you implement with fidelity? How will what you do drive your professional development planning and implementation?)

- Long-range Goals
- Critical Strategies

What are you learning? (How will you be certain that your implementation of the research-based strategies is adding value and improving your results? How will you monitor and report your progress?)

- Action plans
- Progress monitoring
- Short-term goals, priorities and initiatives
- Execution

Surprising strategic planning stats:

- 95% of a typical workforce does not understand its organization's strategy.
- 90% of organizations fail to execute strategies successfully.
- 86% of executive teams spend less than one hour per month discussing strategy.
- 60% of organizations don't link strategy to budget.

Strategic Plans:

- Are based on the pillars of mission, vision, values/commitments and goals.
- Reflect the values of the organization and define commitments and non-negotiables.
- Set focus and priorities, and connect initiatives to needs and requirements.
- Define the criteria for measuring success.
- Define what we ALL need to do well together.
- Inspires action to achieve a big future.
- Guides everyone in daily decision making.

ACTIVITY ONE: Learn more about the strategic planning team, review the meeting schedule and roles and responsibilities of the plan team.

The **responsibilities** of the planning team members include:

- Attend all meetings of the planning team.
- Prepare for each meeting by reading materials aligned to the agenda.
- Participate in 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.
- 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.

ACTIVITY TWO: REFLECTION ON ARTICLES READ	
Article	**Implications for Strategic Plan Work**
ARTICLE 1: From a Nation at Risk to a Nation at Hope	
ARTICLE 2: 2021 Trends in K-12 Education	
ARTICLE 3: The Path to Instructional Excellence and Equitable Outcomes	

ACTIVITY THREE: REVIEW THE STRATEGIC PLANNING PROCESS
Take notes to help you understand the Big Picture of strategic planning:



ACTIVITY FOUR: EXAMINE A DISTRICT STRATEGIC PLAN BASED ON THIS STRATEGIC PLANNING PROCESS	
One Page: ● Mission and Vision ● Core Values ● Long-Range Goals ● High-Leverage Strategies	**Supporting Documents:** ● Vision Continuum ● Key Performance Indicators ● Strategy Action Plan Templates ● Commitments Aligned to Core Values ● Strategic Management System ● Living the Plan

ACTIVITY FIVE: PREVIEW THE DISTRICT'S STRATEGIC PLANNING WEBSITE
An accessible location for the strategic plan team and stakeholders who want to follow the process.

ACTIVITY SIX: PREVIEW THE DATA RETREAT
Date: Thursday, February 17, 2022 **Time:** 8 am – 3 pm **Location:** LTHS South Campus Library **Purpose:** To review and discuss data in order to identify points of pride and opportunities for improvement.