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 is for the plan team to verify District Long-Range Goals, Indicators, and Measures and to 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

Goal	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?"
Strategy	Strategies are the actions 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*.
Indicator	*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.*
Measure	*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.*
Target	Targets are *short term incremental steps measuring growth toward the Goal. Targets are set for each measure. Goals without targets lack power and usefulness.*
Action Plan	*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.*
Key Performance Indicator (KPI)	*A **Key Performance Indicator** is a measurable value that demonstrates how effectively a company is achieving **goals and strategies.** . Organizations use **KPIs** at multiple levels to evaluate their success at reaching targets.*

<u>Activity One:</u> Update the Strategic Foundation or Preferred Future Based on Student and Staff Feedback. Use the Findings of the Vision Retreat documents to see summary of concepts and ideas from our last session.

Components	Reflections for changing the Preferred Future Statement
Mission	**Pick or write in "Other" your favorite:** ● Ensure a learning environment that honors tradition, fosters innovation, and inspires all students to create a better future. ● Empower students to engage in a pathway to ensure college, career, and life success. ● Ensure a pathway to assist each student achieve their educational and personal goals leading to a fulfilling future within the greater community. ● Cultivate empowered learners and engage global citizens through collaboration, innovation, and meaningful learning. ● Empower well-rounded and thoughtful graduates to shape an ever-changing global future. ● Other
Motto	**Pick or write your favorite:** Utilizing some form of our strategic planning motto of Honor Tradition-Innovate Together-Inspire the Future with the *Vita Plena* – the quest for the fulfilling life
Vision	**Vision: Our North Star: All students are prepared to succeed and lead by having the knowledge and skills to learn, engage civically, and lead meaningful lives. OR All students graduate career and college ready guided by our highly qualified educators in providing rigorous, engaging, and equitable learning experiences. Critical traits are listed in our Portraits below:** **Graduate Portrait** Effective Communicator 9 College and Career Ready 7 Culturally Aware Citizen 7 Critical Thinker & Problem Solver 7 Adaptable & Resilient Learner 7 Empowered & Self-Sufficient 6 Personally Responsible 5 Civic & Global Contributor 4 Creative Thinker 3

Adult Portrait

Culturally Aware Advocate 10
Love Teaching & Learning 9
Passionate & Empathetic 9
Ethical & Trusting Character 8
Effective Communicator 8
Respectful of Students and Parents 8
Engaged Collaborator 6
Creator & Innovator 4
Student-Centered Problem Solver 3
Perseverant & Patient 3
Personally & Collectively Responsible 2

System Portrait

Value Its Staff 10
Ensure Sense of Community & Belonging 10
Clear Purpose with Focus 9
Value Diversity and be Culturally Aware 9
Value Ethical & Trusting Relationships 8
Foster Clear Communication 7
Foster Collaboration 6
Promote Continuous Improvement 6
Excellent Stewards of Resources 6
Value Innovation & Risk Taking 6
Ensure Consistency of Policy/Procedures 5
Respectful of Students, Parents & Staff 5

Core Values

Circle your top 6-8/ Revise if necessary:

- Dignity and Respect
- Community & Connections
- Equity & Inclusivity
- Communication & Collaboration
- Tradition of Excellence & Innovation
- Engagement & Continuous Improvement
- Future Relevancy and Readiness
- Responsibility & Accountability

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 s **"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.

Complete Goal One together to establish and communicate a clear process:

1. Consider current goal/ goal statement.
2. Compare it against the Goal criteria above
3. What do you like? What do you want to change?
4. Is it short and compelling?
5. Does it include a powerful verb?
6. Is it something that will not change easily and be part of our overall performance expectations?
7. Is it an expectation of performance not a program or a solution?
8. Is it Results oriented and NOT activity oriented? Can it be measured?

Current Goals	Suggested Goal Statements
GOAL: STUDENT GROWTH & ACHIEVEMENT – **OR Curriculum, Assessment, and Instruction Systems** ***Improve the Academic Achievement of All Students***	Prepare all students for college, career, and life.
	Ensure all students succeed.
	Ensure equity is embedded into the culture to close all learning gaps.
	Provide a comprehensive, innovative education for each student to promote life, career, and postsecondary success.
	Promote student growth and achievement through a whole-child teaching and learning approach.
	Prepare all students to be future ready and empower them to dream, believe and achieve
	Ensure success for all students.
	Other:
GOAL: LEARNING ENVIRONMENT OR **Learning Environment and Student Supports** ***Provide a Safe and Supportive School Climate***	Maintain a focus on results to drive continuous improvement and equitable outcomes for all students
	Enhance the learning environment to meet the needs of all students
	An inclusive culture of learning allows each learner to define their pathway to success.
	Establish a safe, positive, and engaging learning environment to meet the academic and social and emotional needs of each student.
	Provide an engaging and nurturing environment to meet each student's needs and interests.
	Strategies to ensure equity for all students are embedded in the culture, structure, and pedagogy of schools and education systems.
	Other:
GOAL: HIGH QUALITY WORKFORCE – **OR Educator and Leadership Development and Supports** ***Enhance Student Engagement Outside the Classroom***	Attract, develop, and retain quality staff in all schools and departments.
	Select, develop, and retain a high-quality workforce to ensure each student is surrounded with excellent educators
	Invest in staff and leaders to ensure innovation, responsibility, and accountability.
	Engage employees and strengthen workplace pride through effective internal communication and collaboration.
	Each learner is supported by educators committed to creating the culture, structure, policies and instructional practices that engage them in their journey towards college, career, and life readiness.
	Other:
GOAL: FAMILY AND COMMUNITY PARTNERSHIP – **OR Family and Community Partnerships and Career Pathways**	Cultivate partnerships with families and the community to support and expand learning opportunities for each student.
	Support partnerships through communication, collaboration, trust and respect to advocate for student success.
	Communicate and collaborate to build trust, commitment, and community with stakeholders.

Improve Communication with All District Stakeholders	Positively impact future perceptions of Carbondale High School and its feeder elementary PK-8 schools.
	Success requires strong, respectful partnerships with our families and community.
	Other:
GOAL: RESOURCES – **OR Financial, Facility, and Technology Resources** ***Maintain a Healthy Financial Position for the District***	Ensure effective and efficient use of time, space and other resources through careful planning and financial stewardship
	Make effective and efficient use of our resources to maximize educational success for each student, every school, and the district.
	Align human, financial, and physical resources to ensure integrity and equity in resource planning and allocation.
	Align resources and infrastructure.
	Ensure fiscal decisions and infrastructure planning align to student-centered District priorities
	Other:
Other:	

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

SMART	KPIs	Targets
S **M** **A** **R** **T**		

<u>Activity Two Part C:</u> Provide feedback on POSSIBLE goal Key Performance Indicators/Measures to be used to measure progress monitor, and report performance on the long-range goals. <u>Discuss Redefining Ready.</u>

Current Goals	Suggested Revisions	
GOAL: STUDENT GROWTH & ACHIEVEMENT – OR Curriculum, Assessment, and Instruction Systems	• GRADUATION RATE • SAT ENGLISH LANGUAGE ARTS SCORE • SAT MATHEMATICS SCORE • CHRONIC ABSENTEEISM • 9TH GRADE ON TRACK • CLIMATE SURVEY 5E • ENGLISH LANGUAGE PROFICIENCY • SCIENCE ASSESSMENT • FINE ARTS PARTICIPATION • OTHER	

GOAL: LEARNING ENVIRONMENT OR **Learning Environment and Student Supports**	• STUDENT ATTENDANCE
	• CHRONIC ABSENTEEISM
	• DIVERSITY
	  ◦ White
	  ◦ Black
	  ◦ Hispanic
	  ◦ Asian
	  ◦ Multi-Racial
	  ◦ Low Income
	  ◦ Students with Disabilities
	• ENGLISH LANGUAGE LEARNERS
	• OTHER
		• CLASS SIZE
		• STUDENT: TEACHER RATIO
		• STUDENT: ADMINISTRATOR RATIO
		• STUDENT BEHAVIOR REFERRALS
		• IN SCHOOL SUSPENSIONS
		• OUT OF SCHOOL SUSPENSIONS
		• STUDENT SATISFACTION
		• STUDENT ENGAGEMENT
		• OTHER

GOAL: HIGH QUALITY WORKFORCE – OR Educator and Leadership Development and Supports	• TEACHER/STAFF ENROLLMENT • TEACHER/STAFF DIVERSITY • TEACHER/STAFF ATTENDANCE • TEACHER/STAFF RETENTION • TEACHER/STAFF EDUCATION • TEACHER/STAFF PERFORMANCE EVAL • NATIONAL BOARD-CERTIFIED TEACHERS • TEACHER/STAFF SATISFACTION • SALARIES AND BENEFITS • PROFESSIONAL DEVELOPMENT OPPORTUNITIES • OTHER	
GOAL: FAMILY AND COMMUNITY PARTNERSHIP – OR Family & Community **Partnerships and Career Pathways**	• PARENT ENGAGEMENT • PARENT ATTENDANCE AT CONFERENCES • PARENT SATISFACTION • VOLUNTEERISM • PARENT USE OF DIGITAL REPORTING SYSTEMS • CTES • SERVICE-LEARNING OPPORTUNITIES • INTERNSHIP OPPORTUNITIES • OTHER	

GOAL: RESOURCES – OR Financial, Facility, and Technology Resources	• INCREASE ANNUALLY IN REVENUE SOURCES. FUND BALANCES HAVE GROWN EACH YEAR
	• EXPENDITURE LESS THAN REVENUES ANNUALLY
	• EVUALIZED ASSESSMENT VALUATION/TAX RATE
	• STATE FINANCIAL PROFILE
	  ◦ Fund balance to Revenue Ratio
	  ◦ Expenditure to Revenue Ratio
	  ◦ Days Cash on Hand
	  ◦ Percent short-term borrowing remaining
	  ◦ Percent long-term borrowing remaining
	• OPERATING EXPENSE PER PUPIL
		• SPACE UTILIZATION
		• LIFE SAFETY COMPLIANCE
		• FACILITIES LONG RANGE PLAN ON TRACK
		• CLEANLINESS
		• SAFETY AND SECURITY
		• MAINTENANCE
		• CYCLE TIME FOR FACILITY RELATED REPAIRS
		• CYCLE TIME FOR FACILITY RELATED REPLACEMENTS • RATIO STUDENT: CHROMEBOOKS
		• NETWORK/WIFI CAPACITY
		• CLASSROOM TECHNOLOGY UP TO DATE
		• CYCLE TIME FOR TECH RELATED REPAIRS

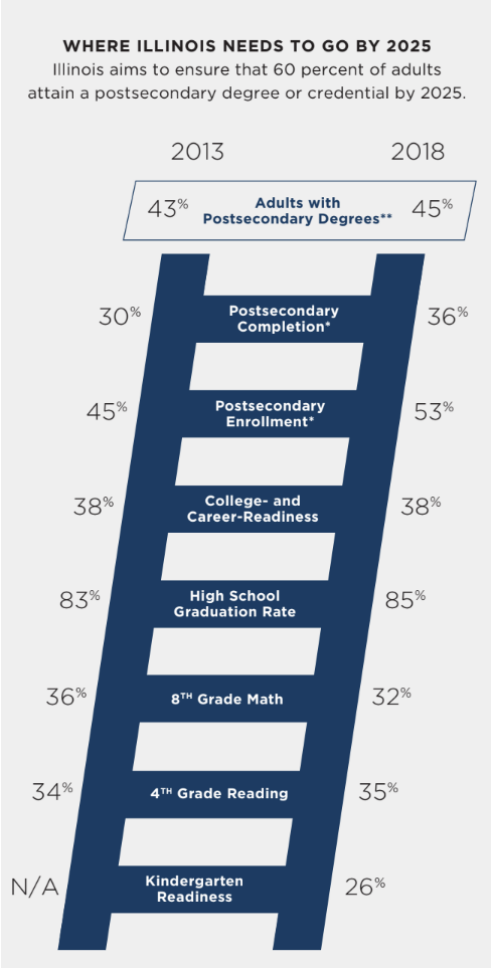
	• INSTRUCTIONAL EXPENSE PER PUPIL • ANNUAL AUDIT FINDINGS • GRANT/OTHER RESOURCES	• CYCLE TIME FOR TECH RELATED REPLACEMENTS

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.



<u>Activity Four Part A:</u> 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)

<u>Criteria for evaluating a strategy statement and related SMART Action plan:</u>

- 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

Model the process with the group.

Use the SWOT Analysis
Use the revised Preferred Future Statement Vision
Identify 8-10 strategy topics that need our critical attention to move the district to a higher level of discussion.

1. Begin with one from a table team. Ask them to state the strategy issue and why they selected it.
2. Ask all other teams is they had a similar or related issue. Count the number of total tables who identified the issue.
3. Chart all strategies with the total number of tables with the same issue identified.
4. Repeat with next table.
5. Chart all strategies with the total number of tables with the same issue identified. until all strategies are out

Identify those strategies on the list with y or more table team responses

- 7 or more
- 5 or more
- 2 or more
- Select the top 8-10

Long Range GOALS	**Ideas for Change** **S** = from SWOT **P** = from Preferred Future Statement **F** = from Futuristic Vision Worksheet **O** = Other	**Strategy** What will be done to address what needs to be better/ideas for change?
GOAL: STUDENT GROWTH & ACHIEVEMENT –	● Inequity in Achievement among student populations ● Varied Student Pathways for College, Career, and Life Readiness will enhance goals and direction for the future ● Pandemic Impacts; learning loss ● Provide rigorous, engaging, and equitable learning experiences ● Prepared to succeed and lead by having the knowledge and skills to learn, engage civically, and lead meaningful lives ● Graduate Portrait	
GOAL: LEARNING ENVIRONMENT	● Inequity in Participation among student populations ● Intervention Systems for Academics and Behaviors including Special Education are not Successful ● Student Engagement, Unity, Collegiality, Collaboration, Communication, Voice, and Satisfaction Need Attention ● Social, Emotional, and Mental Health and Anxiety Needs of Students and Staff Warrant Attention. ● Reinventing the Student Day and Year aligned to the new Mission and Vision will search for time and space to meet individual needs ● Social Media Challenges ● Honors Tradition, Innovates Together, Inspires the Future ● Live Core Values: Dignity and Respect; Future Relevance & Readiness, Responsibility & Accountability, Equity and Inclusivity	

GOAL: HIGH QUALITY WORKFORCE	● Lack of Staff Diversity ● Grading Practices are Inconsistent ● Staff Engagement, Collaboration, Communication, Unity, Voice, and Satisfaction Need Attention ● Social, Emotional, and Mental Health and Anxiety Needs of Students and Staff Warrant Attention. ● Student and Staff Safety and Security ● Communication, Collaboration, and Connection will enhance relationships with Feeder Elementary Districts ● Communication, Collaboration, Connection, and Cohesion will enhance relationships and support between the two Campuses and among and between Divisions ● Exploring Innovative Instructional Practices and Tools will inspire 21st century instruction ● Difficulties associated with Change ● Current Teacher and Support Staffing Shortages ● Student and Staff Safety and Security ● Adult Portrait ● System Portrait Core Values: Tradition of Excellence & Innovation, Engagement & Continuous Improvement, Communication & Collaboration	
GOAL: FAMILY AND COMMUNITY PARTNERSHIP	● Improved Communication with Families will enhance relationships and support ● Societal Racism and Political Differences ● Unhappiness with Public Education ● Civic and Social Unrest ● Difficulties associated with Change ● Core Values: Community & Connections, Communication & Collaboration	
GOAL: RESOURCES	● Technology Clarity, Training, and Expectations will enhance Instruction ● State and Federal School Funding Issues/Unfunded Mandates ● Core Values: Responsibility & Accountability	

<u>Activity Four Part B:</u> Summary of most frequently identified strategies:

Identify 8-10 strategy topics that need our critical attention to move the district to a higher level of discussion.

1. **Chart all strategies with the total number of tables with the same issue identified.**
2. **Identify those strategies on the list with 5 or more table team responses**
3. **4 or more**
4. **3 or more**

Select the top 8-10

Reminder:

The Final Meeting of the Strategic Plan Team will be on May 11. It will be a virtual meeting
A draft of the plan will be sent out for stakeholder feedback between now and that meeting.
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.
Schedule:

- Wednesday, May 11 – Reviewing the Draft Plan Final Session (Zoom)
- Monday, May 16 – Board of Education Regular Action Meeting Sharing the Findings of the Final Meeting of the Plan Team.
- Wednesday and Thursday, June 8 & 9 – Central Leadership Team Workshop on Living the Plan
- Monday, June 13 – Board of Education Committee of the Whole Meeting Presentation
- Tuesday, June 21 – Board of Education Regular Action Meeting for Approval