Orientation/Data Retreat Participant Handout

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 then is shared with all the stakeholder groups represented on the strategic plan team for feedback between the Data Retreat and the Vision Retreat.

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 organization strategic performance viewed through a particular lens. Typical perspectives include financial stewardship, customer service, internal processes and organization capacity for learning and growth.

Process Measure	Performance drivers measure what is happening in the system or process that produces a specific output (efficiency, quality, timelines, waste).
Stakeholders	The universe of entities, whether as individuals or groups, that have an interest in the district. Examples include: students, families, employees, community, leaders, regulators, partners, etc.
Strategic Goal	The specific continuous improvement activities balanced across the perspectives, that 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. The document that sets "Big Picture" direction, the 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.
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.

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:

1. **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?)
    a. **Mission statement**
    b. **Data Review**
    c. **SWOT (data analysis to identify strengths, weaknesses, opportunities and threats**
b) **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?)
    a. **Vision Statement**
    b. **Values statement/commitments**
    c. **Sustainable competitive advantage**

2. **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?)
   a. **Long-range Goals**
   b. **Critical Strategies**
3. **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?)
   a. **Action plans**
   b. **Progress monitoring**
   c. **Short-term goals, priorities and initiatives**
   d. **Execution**

Surprising strategic planning stats:
- ✓ 95% of a typically 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

SETTING THE STAGE: **Learn who is on the team and what the charge is for the team. Review the team roster, meeting schedule and roles and responsibilities of the plan team. Ensure commitment of plan team's members.**

- **See Team Roster**
- **See Meeting Schedule**

The responsibilities of the planning team members include:

- Attend all meetings of the planning team.
- 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.

Setting the Stage for Strategic Planning/Orientation

- We will learn who we are and what we are here to do.
- We will review the strategic planning process to be certain we understand our roles and responsibilities
- We will establish outcomes for our work today
- We will review the homework assignment of developing a shared understanding of the current status of the district's strategic plan

Key Documents for Review:
- Roster
- Schedule
- Current Strategic Plan Information

ACTIVITY ONE: OUR PERCEPTIONS	
What are we MOST PROUD about?	**What are our GREATEST CHALLENGES for the Future?**

ACTIVITY TWO DATA REPORT: Student Growth and Achievement

What are your key findings from the Student Growth and Achievement report?

1.

2.

3.

4.

5.

6.

7.

8.

9.

10

Analysis of the Data from the Report on Student Growth and Achievement	
Going Well; Needs to be Celebrated	*Could be better: Is a Possible Opportunity for Improvement*
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.

ACTIVITY TWO DATA REPORT: Learning and Work Environment

What are your key findings from the Learning and Work Environment report?

1.

2.

3.

4.

5.

6.

7.

8.

9.

10

Analysis of the Data from the Report on Learning and Work Environment	
Going Well; Needs to be Celebrated	*Could be better: Is a Possible Opportunity for Improvement*
1.	*1.*
2.	*2.*
3.	*3.*
4.	*4.*
5.	*5.*

ACTIVITY TWO DATA REPORT: Resources- Finance, Facilities, & Technology

What are your key findings from the Resources- Finance, Facilities, & Technology Report?

1.

2.

3.

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5.

6.

7.

8.

9.

10.

Analysis of the Data from the Report on Resources- Finance, Facilities, & Technology	
Going Well; Needs to be Celebrated	*Could be better: Is a Possible Opportunity for Improvement*
1.	*1.*
2.	*2.*
3.	*3.*
4.	*4.*
5.	*5.*

ACTIVITY THREE: IMPACTS

IMPACTS	IMPACTS FACING THE DISTRICT IN THE NEXT 3-5 YEARS
POLITICAL	
ECONOMICAL	
SOCIAL	
DEMOGRAPHICAL	
TECHNOLOGICAL	
EDUCATIONAL	

ACTIVITY FOUR: SWOT ANALYSIS

STRENGTHS: What do we consider to be our strengths? What advantages do we have? What do others say our strengths are?	WEAKNESSES: What do we consider to be our weaknesses? What are we most criticized for or receive the most complaints about? What do we seem to have a hard time doing well?
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.
6.	6.
7.	7.
8.	8.
9.	9.
10.	10.
OPPORTUNITIES: What opportunities for improvement do we know about, but have not addressed? Where with a little work could we change a weakness into	THREATS: Who or what threatens us the most? What challenges are coming that we must respond to? What might block our progress?

a strength?	
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.
6.	6.
7.	7.
8.	8.
9.	9.
10.	10.

Preview of Vision/Setting Direction Retreat:

Date: September 25

At this meeting of the plan team we will:

- Review stakeholder input and revise the SWOT Analysis
- Refresh the current mission, vision and values statements
- Set long-range goals; discuss key performance measures
- Identify the critical strategies to focus our work for the next 3-5 years.