

# Orientation Participant Handout

**The Orientation session is 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 learn 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

<b>Change management</b>	A structured approach to transitioning individuals, teams, and organizations from a current state to a desired future state.
<b>Organizational alignment</b>	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.
<b>Perspective</b>	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.
<b>Strategic Goal</b>	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)
<b>Strategy</b>	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.
<b>Strategic Plan</b>	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.
<b>Strategic Planning</b>	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:

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. **Motto statement**
  - c. **Data Review- perception and evidenced-based**
  - d. **SWOT (data analysis to identify strengths, weaknesses, opportunities, and threats)**
2. **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. **Portraits (Graduate, Adult, and System)**
  - c. **Values statement/commitments**
  - d. **Sustainable competitive advantage**
3. **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**
4. **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**
  - e. **Progress reporting**

#### **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 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.
- Explore educational, demographic, political, economic, social, and technological impacts on the future of the district.
- Value the feedback and opinions/perspectives of those not on the team.
- Explore research-based, effective practices of high performing districts.
- Review and revise the district’s shared mission, vision, core values/commitments and goals.
- Set long-range goals and identify high leverage strategies that define what priorities need attention to move the district to a higher level of performance
- Recommend the strategic plan to the superintendent.

**ACTIVITY TWO: REFLECTION ON ARTICLES READ**

ARTICLE	IMPLICATIONS FOR STRATEGIC PLAN WORK
<b>Lessons to Learn from Geese</b>	<ol style="list-style-type: none"> <li>1. Share a common direction and goal.</li> <li>2. Stay connected to both the edges and the big picture of the organization.</li> <li>3. Seek help as soon as you get stuck.</li> <li>4. Empower others to lead.</li> <li>5. Praise others and give them recognition and appreciation</li> <li>6. Offer support in challenging times.</li> <li>7. Stay true to core purpose and values.</li> </ol>
<b>2022 Trends in K-12 Education</b>	<ol style="list-style-type: none"> <li>1. Value equity, diversity, and inclusion through community shared values</li> <li>2. Strengthen support and respect for education and educators</li> <li>3. Support the social, emotional, and academic recovery of students and ongoing pandemic disruptions</li> </ol>

	<ol style="list-style-type: none"> <li>4. Build relationships with community in the face of increased polarization</li> <li>5. Adequate federal relief funding both to meet immediate needs but also long-term goals to improve student outcomes</li> </ol>
<p>Dreaming into Learning Futures</p>	<ol style="list-style-type: none"> <li>1. Look beyond the problems of the present to imagine future possibilities</li> <li>2. People are finding power in social movements and new forms of activism</li> <li>3. There are new economic and employment realities</li> <li>4. There are new possibilities with the decentralization of digital technologies. The workplace is changing. Tools are changing</li> <li>5. Natural disasters, mass shootings, viruses and emotional isolation are interconnected threats to personal and community safety</li> </ol> <p>Notes:</p>
<p><b>ACTIVITY THREE: REVIEW THE STRATEGIC PLANNING PROCESS</b></p>	
<p><i>Take notes to help you understand the Big Picture of strategic planning:</i></p>	
	<p><b>Readiness</b></p>



**Orientation**

**Data Retreat**

**Vision Retreat**

**Setting Direction Retreat**

**Recommendation**

**Living the Plan**

**ACTIVITY FOUR: REVIEW THE STATUS OF THE CURRENT STRATEGIC PLAN**

**What is the status of the current plan? Has the plan been a useful document to guide the district’s action over time?**

**ACTIVITY FIVE: EXAMINE A DISTRICT STRATEGIC PLAN BASED ON THIS STRATEGIC PLANNING PROCESS**

**One Page:**

- Mission, Motto, and Vision
- Graduate, Educator, and System Portraits
- Core Values
- Long-range Goals

**Supporting Documents:**

- Portrait Characteristics
- Core Value Descriptors
- Strategy Descriptors
- Strategy Action Plan Templates

<ul style="list-style-type: none"> <li>• High-Leverage Strategies</li> </ul>	<ul style="list-style-type: none"> <li>• Progress Monitoring &amp; Reporting Templates</li> <li>• Strategic Management System</li> <li>• Living the Plan</li> </ul>
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**ACTIVITY SIX: PREVIEW THE DISTRICT’S STRATEGIC PLANNING WEBSITE**

*Share a transparent location for the strategic plan team as well as stakeholders who want to follow the process.*

**ACTIVITY SEVEN: PREVIEW THE DATA RETREAT**

**Date:** September 27  
**Time:** 8:00 am – 3:30 pm  
**Purpose:** To paint a picture with data and other information of “where the district is now” with its performance.

- Academic Data and Information
- Culture Data and Information
- Resources Data and Information

We will examine trend, cohort, subgroup, and comparative data.  
We will develop a shared understanding of what is going well (strengths) and what needs our attention (Weaknesses, Opportunities).  
We will produce a SWOT Analysis (Strengths, Weaknesses, Opportunities, and Threats)

***“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.” - Van Clay, Soldwedel, and Many 2011***

***A strategic plan helps to ensure the district is a school system rather than a system of schools:***

<b><i>School System</i></b>	<b><i>System of Schools</i></b>
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- *Aligned across the entire organization, vertically across roles, and horizontally in terms of initiatives*
- *Uses shared decision-making based on role expertise*
- *Sets goals and priorities that do not compete with each other for time and resources*
- *Characterized by focused and efficient alignment: use of time and resources is maximized to meet organizational and school goals*

- *Comprised of schools that are independent of—rather than aligned with—each other and with the school organization’s goals*
- *Concerned more with individual or school initiatives*
- *Characterized by competing initiatives*  
*Marked by haphazard and random alignment that doesn’t change the overall organization in a focused continuous way*

***Thanks for a great day!***