Strategic Plan Development:

ROADMAP RETREAT

Elevating District Performance:
A Strategic Framework for Success

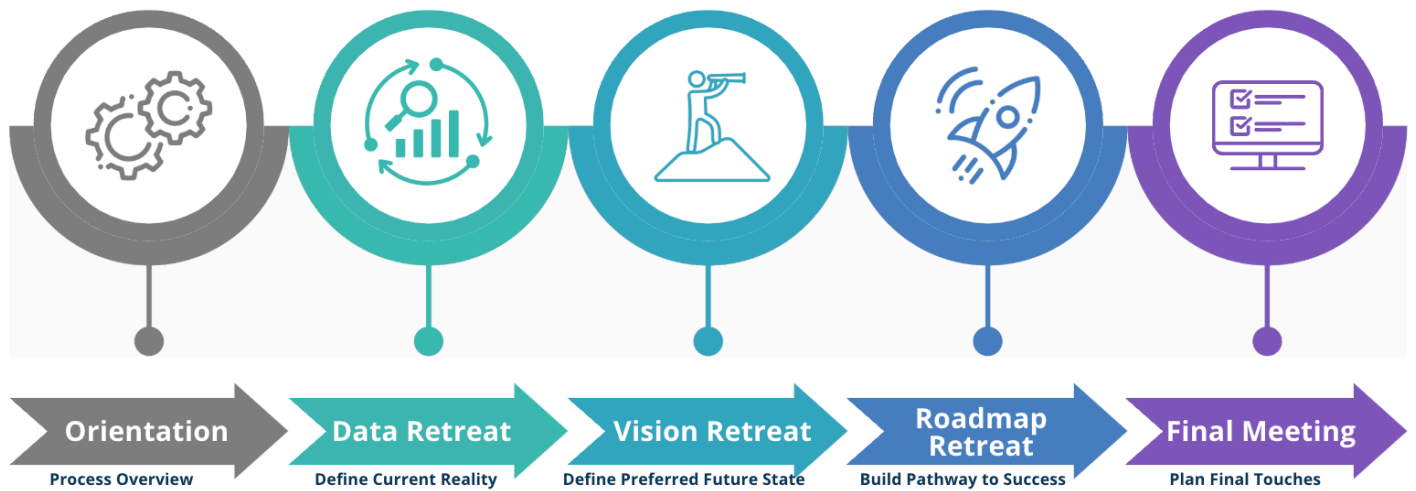## Catalyst for Educational Change

THE PROCESS

CEC Strategic Planning Process

Elevating District Performance: A Strategic Framework for Success

Orientation	Data Retreat	Vision Retreat	Roadmap Retreat	Final Meeting
Process Overview	Define Current Reality	Define Preferred Future State	Build Pathway to Success	Plan Final Touches

ROADMAP RETREAT
BUILDING PATHWAY TO SUCCESS!

THE ROADMAP RETREAT allows the Strategic Plan Team to make decisions related to goals and high-leverage strategies. What are the Priorities? What will everyone do differently to get improved results? What research-based strategies will everyone implement with fidelity? How will what we do drive professional development planning and implementation? How will what we do drive the use of district resources?

It allows the Strategic Planning Team to refine the district's current mission, vision, core values, and portraits with stakeholder feedback. Through collaborative discussion, the team will develop a compelling five-year vision that includes a Preferred Future Statement and a draft Strategic Plan, including Long-Range Goals and prioritized Strategies, to drive the district toward measurable continuous improvement.

DEFINITIONS

- **Goal**: Long-range objectives that define the district's desired outcomes within the strategic plan timeline. Goals provide a results-oriented framework and establish targets and timelines to measure impact and answer, "How will we know if we are making a difference?"

- **Strategy**: Actions designed to bridge the gap between the district's current state and its desired future. Strategies address critical areas where current efforts are insufficient, offering the greatest potential return on investment (time, personnel, and resources). Strategies should be focused and comprehensive.

- **Indicator**: Measurable standards, skills, or evidence that demonstrate progress toward a goal. Lagging indicators assess overall achievement, while leading indicators track formative progress. Indicators provide evidence for monitoring and reporting goal attainment.

- **Measure**: Tools or instruments aligned with indicators to quantify or qualify success. Multiple measures may be used for a single indicator.

- **Target**: Specific, incremental steps that define progress toward a goal. Targets provide benchmarks for each measure and are essential for goal effectiveness.

- **Key Performance Indicator (KPI)**: A quantifiable metric that evaluates organizational effectiveness in achieving goals and strategies. KPIs are used across all levels to assess progress toward targets.

ACTIVITY 1
Stakeholder Feedback

Reflect on the feedback and note any adjustments you want to discuss with your group.	
MISSION	
VISION	
STUDENT PORTRAIT	
ADULT PORTRAIT	
FAMILY PORTRAIT	
SYSTEM PORTRAIT	

ACTIVITY 2
Goal Setting

STRATEGIC GOALS define the desired outcomes of improvement initiatives, providing clarity on what the district aims to achieve. They establish targets and timelines, enabling staff to measure impact and answer, "How will we know if we are making a difference?" Effective goals drive a results-oriented culture and foster accountability.

Key Characteristics of Strategic Goals:
- **Mission and Vision Alignment**: Goals must reflect the district's overarching mission and vision.
- **Specificity and Strategic Focus**: Goals should be clearly defined and address key strategic priorities.
- **Measurability**: Goals should be quantifiable or qualifiable, allowing for progress tracking.
- **Actionability and Alignment**: Goals should be achievable and aligned with other district initiatives.
- **Results Orientation**: Goals should focus on desired outcomes.
- **Time-Bound and Target-Oriented**: Goals should include specific timelines and measurable targets.
- **Guidance for Improvement:** Goals should inform school, team/department, and classroom improvement efforts.
- **Performance Alignment**: Goals should align with leader and employee performance objectives.
- **Data-Driven Monitoring**: Goals should facilitate a data system for monitoring and reporting performance at all levels.

Goal vs. Strategy:
- **Goal** (**WHAT**): Defines the desired outcome.
- **Strategy** (**HOW**): Outlines the actions to achieve the goal.

Examples of Strategic Goals:
- Ensure college and career readiness for all students.
- Maximize development, growth, and achievement for all students.
- Cultivate strong partnerships with families and the community.
- Provide a rigorous, relevant, and engaging learning environment.
- Foster a safe and supportive learning environment.
- Promote shared responsibility and accountability among school, home, and community.
- Align resources with strategic priorities within a balanced budget.
- Cultivate a positive and productive work environment for high-quality staff.
- Ensure efficient and effective business operations and responsible stewardship of public resources.

ACTIVITY 2
Goal Setting

DRAFT GOAL TITLES	DRAFT GOAL STATEMENTS
GOAL 1	
GOAL 2	
GOAL 3	
GOAL 4	
GOAL 5	

ACTIVITY 3
Identifying Priority Strategies

PRIORITY STRATEGIES are targeted actions designed to bridge the gap between the district's current state and its desired future. They address critical areas where current efforts fall short, maximizing the return on investment (time, personnel, and resources). Strategies should be focused and comprehensive.

Key Aspects of Strategies:
- **Addressing Gaps**: Strategies identify and address significant gaps hindering goal attainment.
- **District-Level Identification, Action Plan-Level Implementation**: The strategic plan team identifies strategies at the district level, while action plan teams develop detailed implementation plans.
- **Plan-Do-Study-Act (PDSA) Cycle**: Action planning must adhere to the PDSA cycle to ensure consistent, research-based implementation.

Goal vs. Strategy:
- Goal (WHAT): Defines the desired outcome.
- Strategy (HOW): Outlines the actions to achieve the goal.

Criteria for Evaluating Strategies:
- Does the strategy address a critical gap or need?
- Is the strategy supported by data and stakeholder input?
- Is the strategy a mandated requirement with a specific timeframe?
- Is the strategy a high-priority initiative?
- Is there stakeholder buy-in and ownership regarding resource allocation?
- Is there an understanding of past efforts and their limitations?
- Are there clear plans for implementing the strategy differently?
- Can the strategy's progress be measured and monitored?
- Does the strategy align with school and district improvement goals?

ACTIVITY 3
Identifying Priority Strategies

SAMPLE GOALS AND ALIGNED STRATEGIES	
Provide comprehensive, innovative education for every student to promote life, career, and post-secondary success.	• Provide rigorous, engaging, and equitable learning experiences for all students aligned to the district vision. • Use current research to inform and bring consistency to grading practices.
Provide a safe, positive, and engaging learning environment to meet the academic, social, and emotional needs of all students	• Build confidence, self-sufficiency, and wellness in students by enhancing students' social and emotional needs. • Improve support and intervention systems for academics and behaviors to close gaps.
Invest in staff and culture to ensure innovation, collaboration, and accountability	• Enhance staff satisfaction, innovation, and campus unity through engagement, collaboration, voice, and professional development. • Attract, recruit, hire, mentor, and support strong employees who reflect student and community populations and commit to our mission, vision, core values, and goals. • Promote high school readiness by fostering communication, collaboration, and connection with the feeder PK-8 elementary districts.
Partner with families and the community to support and expand learning opportunities for all students	• Build confidence and engagement with families and communities through improved communication, collaboration, and transparency. • Offer community learning opportunities to expose students to potential career pathways and community services.
Allocate necessary resources to maximize educational success for all students	• Improve technology expectations, infrastructure, and access for students, staff, and families. • Explore and reinvent the student day and year; Upgrade facilities to better meet future interests and needs of students and staff.

ACTIVITY 3
Identifying Priority Strategies

| Review and Group	• Review the post-it suggestions for your goal and group them into themes
Define	• Review the grouped themes and the SWOT weaknesses and opportunities • Define a goal title and goal statement
Develop and Prioritize	• Turn each theme into a strategy statement • Review the Criteria for Evaluating Strategies before finalizing decisions • Prioritize the strategy statements from most critical to least critical

GOAL TITLE	
GOAL STATEMENT	

PRIORITY STRATEGIES

Identify 8-10 strategies in your goal area that need our critical attention to move the district to a higher level of success.

What actions can we take that will get us to our goal?

Thank you!

Catalyst for Educational Change (CEC) is a nonprofit consulting agency solving complex problems in educational systems.

We use continuous improvement practices and deep collaboration to help educational systems build internal capacity, create better outcomes, communicate with leadership, and re-think our children's futures.

www.cecweb.org
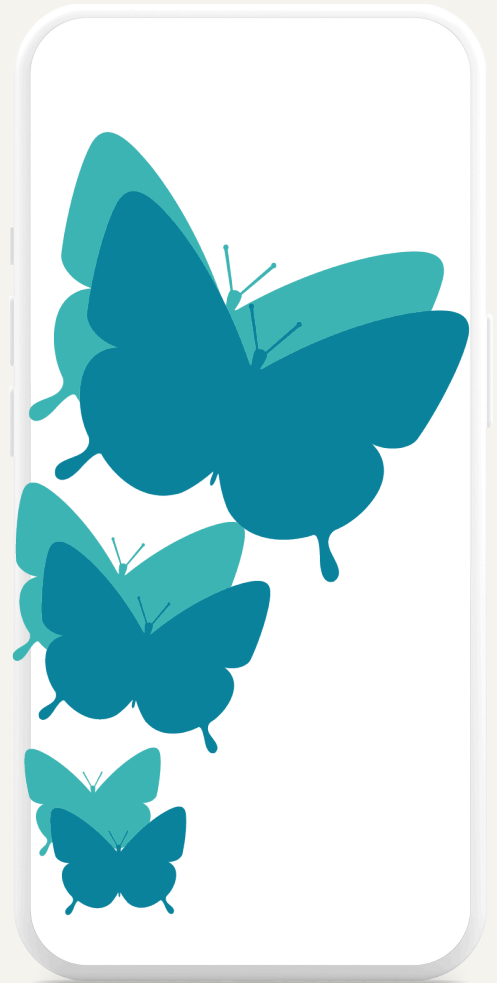
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