Fairfax County Public Schools

SCHOOL BOARD RETREAT

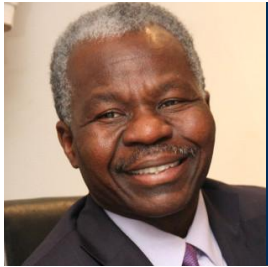## Equity-centered Strategic Planning

Presented by: **Performance** *fact***, Inc.**

Lead Facilitator: Mutiu O. Fagbayi *(President/CEO)*

20 September 2022 | Falls Church, VA

Facilitator

Mutiu O. Fagbayi
President/CEO

"Moo-tee-oo   Fa-gb-ayee"

A *facilitator* is a guide. A guide does not command or control.

However, a facilitator does direct, leaving it up to you to follow.

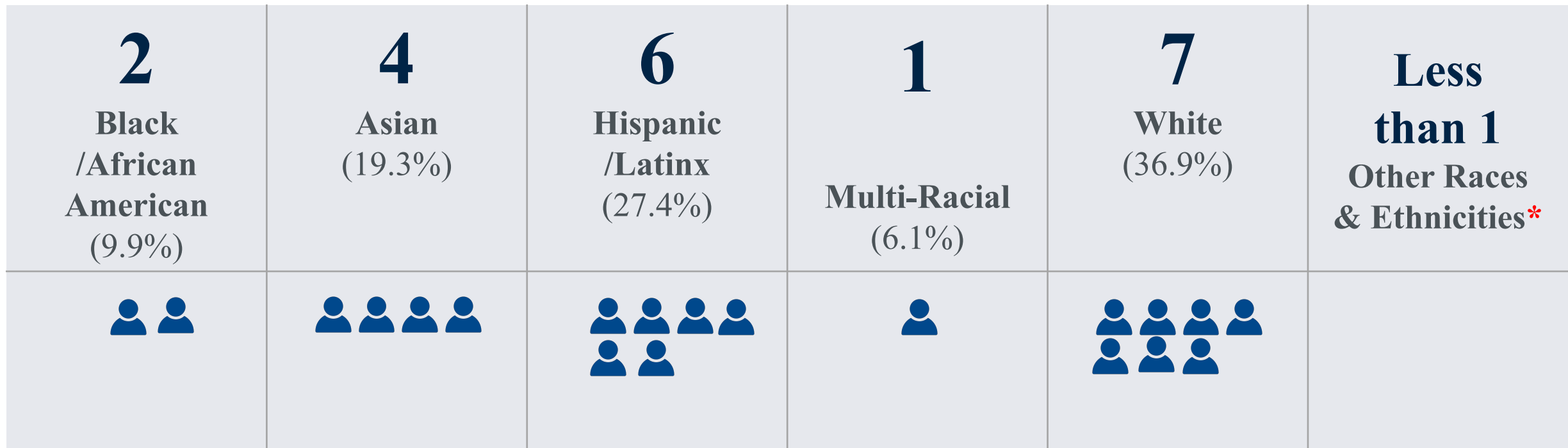# Awọn ọmọ n'kọ?
"How are the children?"

Awọn ara ile n'kọ?
"How is your household?"

A Profile of Our Students

Out of every 20 students…

2 Black /African American (9.9%)	**4** Asian (19.3%)	**6** Hispanic /Latinx (27.4%)	**1** Multi-Racial (6.1%)	**7** White (36.9%)	**Less than 1** Other Races & Ethnicities*
👤👤	👤👤👤👤	👤👤👤👤👤👤	👤	👤👤👤👤👤👤👤	

*American Indian/Alaskan Native = 0.3%
Native Hawai'ian/Other Pacific Islander = 0.1%

A Profile of Our Students

Out of every
20 students...

3 Students with Disabilities (14.9%)

5 English Learner (25.9%)

6 Low-Income (31.7%)

	Year	Districtwide	American Indian/ Alaskan Native	Asian	Black/ African American	Hispanic/ Latino	Native Hawaiian/ Other Pacific Islander	Multi-Racial	White	Low-Income	English Learner	Students with Disabilities	Homeless Students	Students in Foster Care
% of total student **enrollment**	2022	178,636	0.3%	19.3%	9.9%	27.4%	0.1%	6.1%	36.9%	31.7%	25.9%	14.9%	0.4%	0.1%
			n=466	n=34476	n=17638	n=49008	n=224	n=10876	n=65948	n=56708	n=46232	n=26671	n=727	n=177
Kindergarten Readiness														
Percentage of students with pre-school experience	2022	29%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Percentage of Kindergarten students meeting Fall Literacy Benchmarks	2019	64%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
K-12 Learning and Engagement: Disparities in Performance on Tests/Assessments														
English Reading Assessment (Grades 3-8, HS EOC)	2022	16	15	18	14	11	16	18	18	11	6	10	7	12
Writing Performance Assessment (Grade 8, HS EOC)	2022	16	20	18	14	11	20	19	18	12	2	17	6	N/A
Math Performance Assessment (Grades 3-8, Algebra I, Geometry, Algebra II)	2022	15	14	18	13	10	15	17	17	11	7	9	6	10
Science Performance Assessment (Grades 5, 8, Biology, Chemistry, Earth Science)	2022	14	13	17	12	9	14	17	17	9	4	8	5	8
History/Social Science Performance Assessment (Virginia Studies, Civics and Economics, Geography, World History I, II, Virginia and United States History)	2022	15	N/A	18	13	10	N/A	18	18	10	6	8	17	N/A
K-12 Learning and Engagement: Disparities in Engagement in Schooling														
% chronic absenteeism rate (10% or greater)	2021	5%	10%	2%	7%	11%	3%	3%	2%	11%	10%	10%	38%	N/A
% short-term suspension rate (as a proportion of short-term suspensions for all students)	2021	N/A	1.2%	9.5%	14.9%	48.2%	0.0%	8.3%	17.9%	N/A	N/A	N/A	N/A	N/A
% Discipline Index: Short-term suspension rate (suspension rate divided by overall percentage enrollment of the student group)	2021	N/A	4	0.5	1.5	1.8	0	1.4	0.5	N/A	N/A	N/A	N/A	N/A
% long-term suspension rate (more than 10 days in the school year)	2021	0%	0%	0%	0%	100%	0%	0%	0%	N/A	N/A	N/A	N/A	N/A
Educational Attainment: Disparities in Graduation														
% students graduating on-time (4-year cohort graduation rate)	2021	95	89	99	96	84	96	98	99	93	77	95	66	N/A
% students dropout rate (cohort dropout rate)	2021	5%	11%	1%	3%	15%	4%	1%	1%	6%	23%	4%	33%	0%

How far have we come?

"If the ladder of educational opportunity rises high at the door of some youth and scarcely rises at the doors of others, while at the same time formal education is made a prerequisite to occupational and social advancement, then education may become the means, not of eliminating race and class distinctions, but of deepening and solidifying them."

Report of the Commission on Higher Education (1947)

[As quoted in Monitoring Educational Equity (2019) |

The National Academies of Sciences, Engineering, and Medicine*]*

The Performance Fact Premise

Cause & Effect

"All students will learn at high levels when instruction meets their needs. What a student has not learned well *yet*, is something she/he has not been taught well yet.

Student learning, then, is an "*effect*" whose "*cause*" lies in the quality and effectiveness of educational PRACTICES.

If we want improved outcomes for students, the starting point must be the continuous improvement of teaching practices, leadership practices and organizational practices, because they are the precursors to student learning."

Mutiu O. Fagbayi (2006)

Outline

1. **Framework** for Strategic Planning & the Role of **Equity**

2. Engaging **Diverse Voices** & Perspectives

3. Timeline & Planning **Calendar**

4. Roles & Responsibilities, **Project Management**, Facilitation, and Coordination
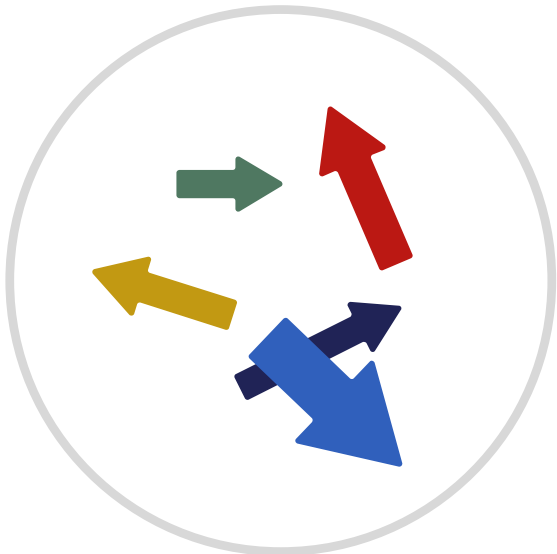
5. Checkout / **Path Forward**
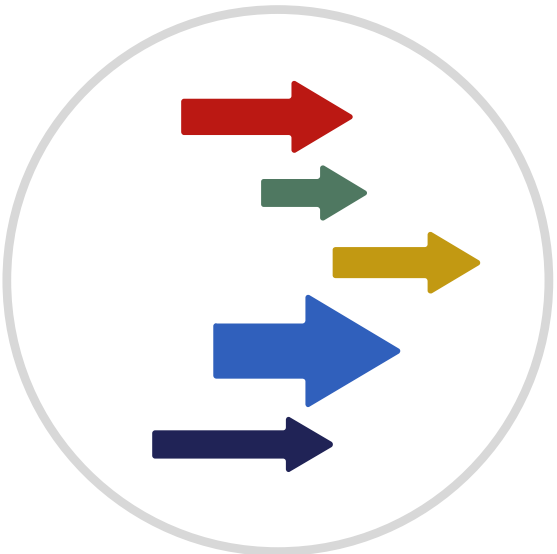
Strategic Planning Framework and the Role of Equity

Why Plan? | The Power of Alignment

Misalignment

Alignment

A primary aim of *planning* is unity of purpose, or **alignment**

© Performance Fact

***Alignment**: getting people, process, program and structure on the same page, going in the same direction.*

Phases of the Planning Process

1. • "Is everyone **ready** to go?"   [Community mobilization]

2. • "Where are we **now**?"   [Assessment of current state]

3. • "Where are we going **next**?"   [Core purpose, goals, measures]

4. • "Is everyone **still** with us?"   [Stakeholder "reality check"]

5. • "How are we going to get **there**?"   [Building blocks: practices, strategies, structures]

6. • "Have we aligned **resources** with the Plan?"   [Allocation of people, time, $]

7. • "Do we have the **support** of our leaders and policymakers?"   [Formal approval]

Phases of the Planning Process
(for an October-May planning window)

1 • "Is everyone **ready** to go?" [**October-November**]

2 • "Where are we **now**?" [**November-December**]

3 • "Where are we going **next**?" [**December-February**]

4 • "Is everyone **still** with us?" [**December-February**]

5 • "How are we going to get **there**?" [**February-April**]

6 • "Have we aligned **resources** with the Plan?" [**April-May**]

**7** • "Do we have the **support** of our leaders and policymakers?" [**May**]

A Data-driven, Equity-focused Planning Process

Data	Analysis / Discovery	Solution
What data do we have?	**What does the data say?** **and** **Why does the data look that way?**	**What are we going to do about it all?**
Student Data for multiple sources	**Areas of Strength** and **Areas of Concern** based on student data *and* **"Root causes"** (underlying causes) of the current state of student learning and achievement	• Student Learning • Instructional Effectiveness • Empowering Infrastructure

Equity-centered Strategic Planning

"Keeping ends and means in proper sequence."
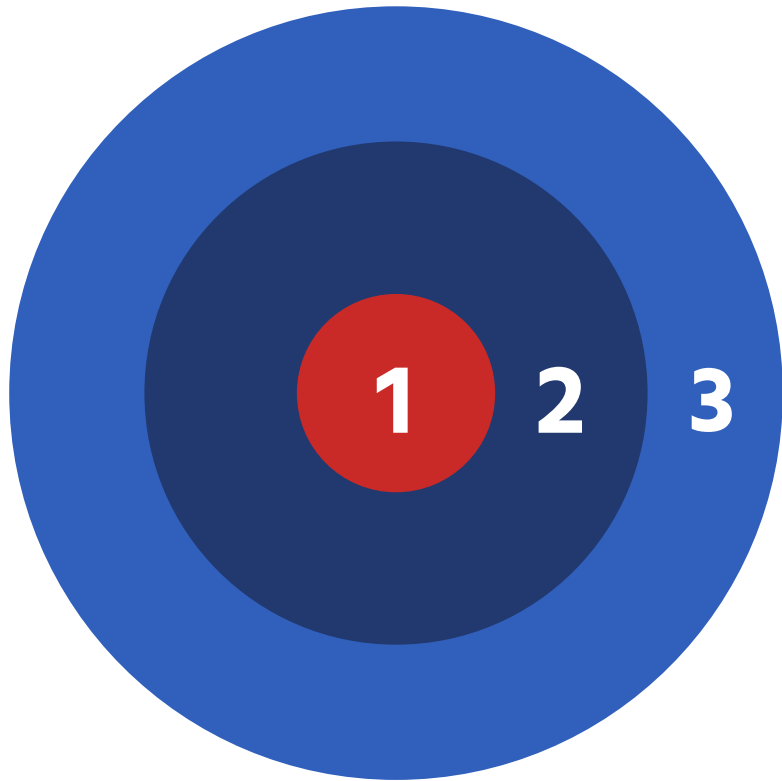
1. Student Learning

- Equity Principles
- Our Promise
- Portrait of a Graduate
- Goals & Measures of Student Success
- Performance Benchmarks

2. Instructional Effectiveness

- "Four Pillars" (Building Blocks)
- Professional Practices for Effective Instruction
- Strengthening Equitable Access to the Instructional Core

3. Empowering Infrastructure

- Strategy Map: Strategic Priorities & Key Actions
- Roadmap for Disciplined Implementation
- Aligned Resources, Supports & Services
- Leadership for Results

Perspectives on EQUITY

Articles/Videos

Video: Targeted Universalism

Video: "This is Equity"
https://www.youtube.com/watch?v=tcPGacPFt6E&t=2s

Video: "Equity in the classroom"
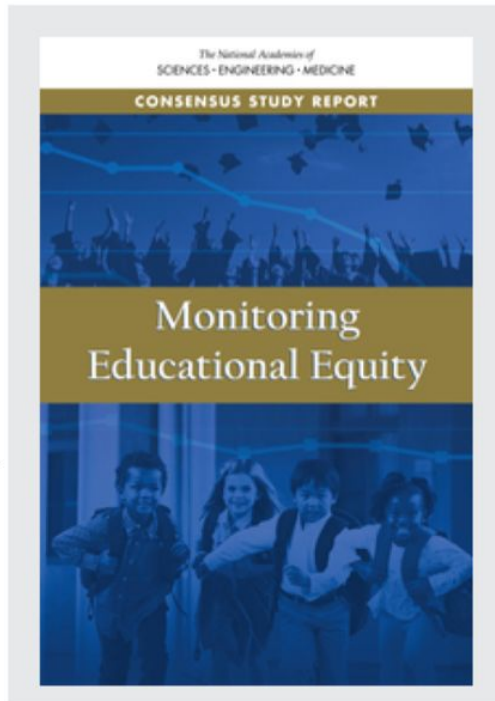https://www.youtube.com/watch?v=Mae803ZOc-A

Article: *Monitoring Educational Equity*

Monitoring Educational Equity

The National Academies of SCIENCES ENGINEERING MEDICINE

Monitoring Educational Equity (2019)

DETAILS

268 pages | 6 x 9 | PAPERBACK
ISBN 978-0-309-49016-0 | DOI 10.17226/25389

Equality vs. Equity

Equality

Equality

Resources and supports are distributed evenly, irrespective of individual needs or assets

"Starting point" is irrelevant

Equity

Equity

Incorporates the idea of need; distribution of resources and supports is ***purposefully unequal***

"Starting point" is an important factor

[Reference: Monitoring Educational Equity | The National Academies of Sciences, Engineering, and Medicine]

Purpose of Equity Indicators

"The purpose of [Equity] indicators is *not* to track progress toward aggregate goals, such as that all students graduate high school within 4 years of entering 9th grade, but to identify **differences** in progress toward that goal, **differences** in students' family background and other characteristics, and **differences** in the conditions and structures in the education system that may affect students' education."

Monitoring Educational Equity | The National Academies of Sciences, Engineering, and Medicine (page 1)

7 Domains of Equity Outcomes & Access

Outcomes

Access

- ▶ *Domain A*: Kindergarten Readiness
- ▶ *Domain B*: K-12 Learning and Engagement
- ▶ *Domain C*: Educational Attainment

- ▶ *Domain D*: Extent of Racial, Ethnic, and Economic Segregation
- ▶ *Domain E*: Equitable Access to High-Quality Early Learning Programs
- ▶ *Domain F*: Equitable Access to High-Quality Curricular and Instruction
- ▶ *Domain G*: Equitable Access to Supportive School and Classroom Environments

Reference: Monitoring Educational Equity | The National Academies of Sciences, Engineering, and Medicine

16 Indicators for Monitoring Educational Equity [Reference: National Academies of Sciences, Engineering, & Medicine; June 2019]

Domain A: **KINDERGARTEN READINESS**
- Indicator 1: Disparities in Academic Readiness
- Indicator 2: Disparities in Self-Regulation and Attention Skills

Domain B: **K-12 LEARNING AND ENGAGEMENT**
- Indicator 3: Disparities in Engagement in Schooling
- Indicator 4: Disparities in Performance in Coursework
- Indicator 5: Disparities in Performance on Tests

Domain C: **EDUCATIONAL ATTAINMENT**
- Indicator 6: Disparities in On-Time Graduation
- Indicator 7: Disparities in Postsecondary Readiness

Domain D: **EXTENT OF RACIAL, ETHNIC, AND ECONOMIC SEGREGATION**
- Indicator 8: Disparities in Students' Exposure to Racial, Ethnic, and Economic Segregation

Domain E: **EQUITABLE ACCESS TO HIGH-QUALITY EARLY CHILDHOOD EDUCATION**
- Indicator 9: Disparities in Access to and Participation in High-Quality Early Childhood Education

Domain F: **EQUITABLE ACCESS TO HIGH-QUALITY CURRICULA AND INSTRUCTION**
- Indicator 10: Disparities in Access to Effective Teaching
- Indicator 11: Disparities in Access to and Enrollment in Rigorous Coursework
- Indicator 12: Disparities in Curricular Breadth
- Indicator 13: Disparities in Access to High-Quality Academic Supports

Domain G: **EQUITABLE ACCESS TO SUPPORTIVE SCHOOL AND CLASSROOM ENVIRONMENTS**
- Indicator 14: Disparities in School Climate
- Indicator 15: Disparities in Nonexclusionary Discipline Practices
- Indicator 16: Disparities in Nonacademic Supports for Student Success

A Peek at Student Achievement in MCSD

When does a "difference" among student-groups
become a consequential "equity disparity"?

MEASURE	BLACK	HISPANIC	WHITE	DISPARITY? (Y/N)
DISCIPLINE INCIDENTS				
As a % of all students enrolled	**18.8%**	**14.6%**	**53.6%**	
As a % of all discipline incidents	**34.9%**	**10.2%**	**35.8%**	
Disproportionality Index	**1.85**	**0.70**	**0.67**	
MET STANDARDS ON STATE TESTS (# out of every 20 students)				
English Language Arts – Grade 3	7	7	9	
Mathematics – Grade 3	**6**	**6**	**9**	
Algebra	**6**	**6**	**13**	
Biology	**8**	**7**	**12**	
English 1	**4**	**na**	**9**	
4-YEAR HS GRADUATION RATE	91.3%	86.8%	91.0%	
DROPOUT RATE	1.5%	1.8%	4.8%	

A Peek at Student Achievement in MCSD

When does a "difference" among student-groups
become a consequential "equity disparity"?

MEASURE	BLACK	HISPANIC	WHITE	DISPARITY ? (Y/N)
STUDENT VOICE (% student who Agree/Strongly Agree)				
I can learn in my class if I try hard enough	**77.9%**	**77.9%**	**88.3%**	
My teachers treat me with respect	90.9%	90.9%	94.1%	
My teachers make sure I am learning	93.4%	93.4%	94.1%	
My teachers expect me to try my best	93.3%	93.3%	95.1%	
The materials/books we use in class include pictures/examples of a diversity of people	72.8%	72.8%	69%	
I feel emotionally safe at school	48.7%	60.2%	43.6%	

Where do we have consequential "equity disparity" among our student-groups?

	Equity Indicators	Equity Disparity?			Equity Indicators	Equity Disparity?
1	Academic Readiness			9	Access to and Participation in High-Quality Early Childhood Education	
2	Self-Regulation and Attention Skills			10	Access to Effective Teaching	
3	Engagement in Schooling			11	Access to and Enrollment in Rigorous Coursework	
4	Performance in Coursework			12	Curricular Breadth	
5	Performance on Tests			13	Access to High-Quality Academic Supports	
6	On-Time Graduation			14	School Climate	
7	Postsecondary Readiness			15	Nonexclusionary Discipline Practices	
8	Students' Exposure to Racial, Ethnic, and Economic Segregation			16	Nonacademic Supports for Student Success	

The Equity Imperative: Equitable Access, Equal Outcomes

Equitable access

to resources and opportunities that guarantee fair, just, and affirming experiences and produce

equal outcomes

for every student, without exception

Reference: Mutiu Fagbayi; Performance Fact, Inc. (2021)

Engaging Diverse Voices & Perspectives

Engaging Diverse Voices

"Wide net, tight process."

__*Michelle C. Reid*

Embracing Diverse Voices & Perspectives

Meaningful engagement strengthens understanding, appreciation and commitment.

Diverse Voices, *aligned to a* Unified Direction

- Building/Division Administrators
- Instructional Staff
- Support Staff
- Students
- Families
- Community Organizations
- Community Members
- Association Leadership
- School Board
- Teachers

Embracing Diverse Voices & Perspectives

Core Planning Team (CPT) …

- ❑ Diverse team; includes all stakeholders
- ❑ Stewardship of the process and products
- ❑ "Integrator" of input from all perspectives
- ❑ Co-facilitator of "reality check" sessions
- ❑ 40 -150 people
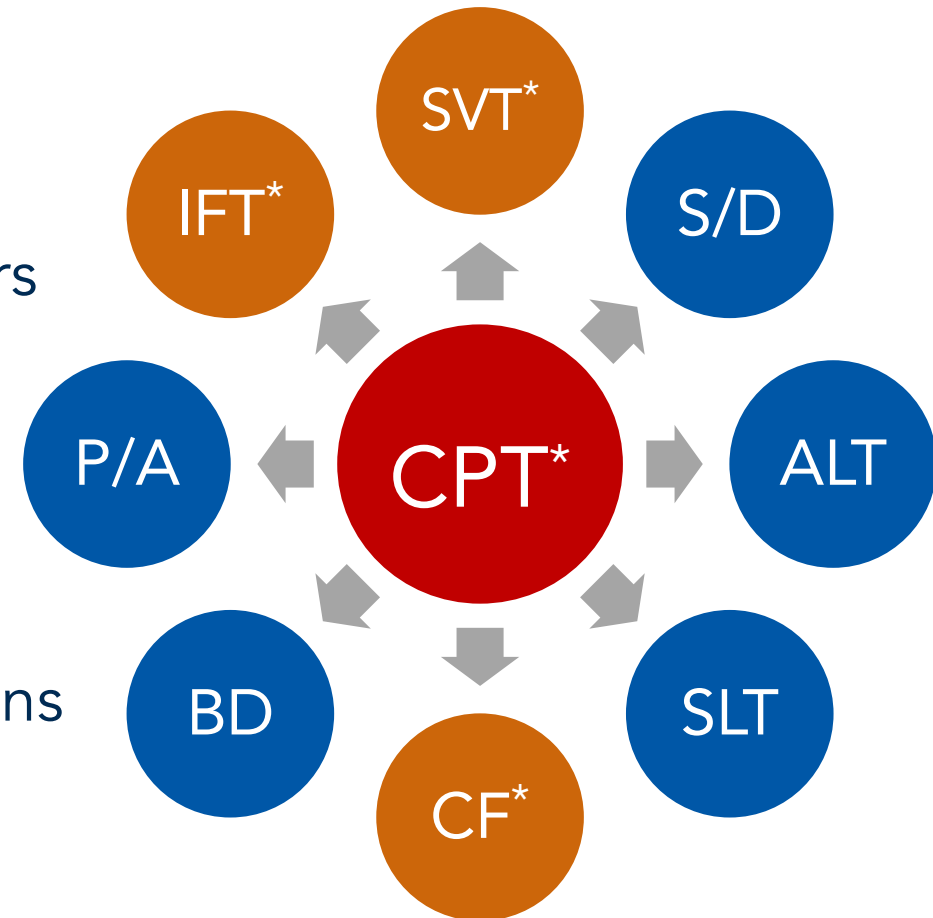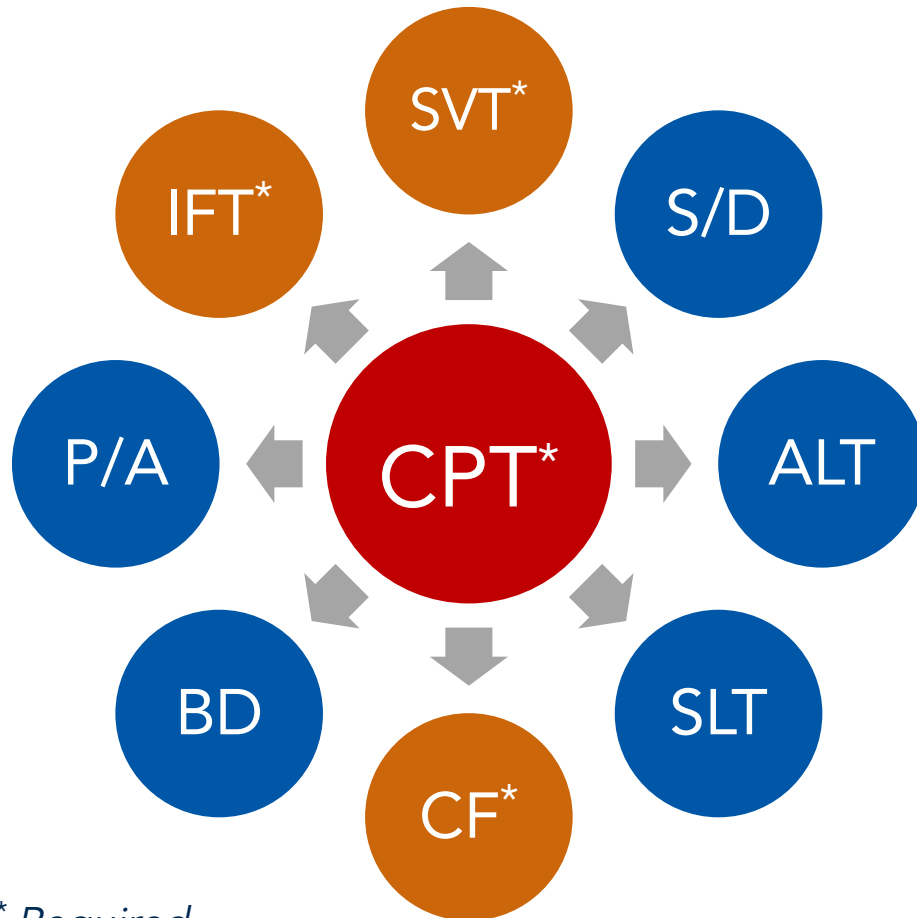

Required

Embracing Diverse Voices & Perspectives

* Required

"Reality Check" Teams
& Listening Sessions …

- ☐ CPT = CORE PLANNING TEAM
- ☐ SVT = Student Voice Team
- ☐ IFT = Instructional Focus Team
- ☐ S/D = Schools/Department
- ☐ P/A = Principals/Administrators Team
- ☐ ALT = Alignment Team
- ☐ BD = School Board
- ☐ CF = Community Forums
- ☐ SLT = Superintendent's Leadership Team

"Reality Check" Teams & Listening Sessions

SVT	**Student Voice Team**	• Principal-led sessions; <u>ALL</u> students, **by School**	• Focus group and surveys
CPT	**Core Planning Team**	• All stakeholders represented; 100+ people	• 6-8 sessions, including full-day
IFT	**Instructional Focus Team**	• Teachers & instructional staffs; 80+ people	• 4-6 sessions, including full-day
S/D	**Schools/Departments**	• Feedback from <u>every</u> school & department	• Part-way through the process
P/A	**Principals/Admin**	• Feedback and meaning-making	• Every 4-6 weeks; **by Region**
ALT	**Alignment Team**	• Partners/"movers & shakers"; **2-3 sub-teams**	• Meets every 4-6 weeks
BD	**Board Review Team**	• Champions/sponsors <u>and</u> active participants	• Updates every 4-6 weeks
CF	**Community Forums**	• Two forums held in <u>each</u> **Magisterial District**	• At least two forums **at-large**

PERFORMANCE FACT, INC

Timeline & Planning Calendar

Planning Calendar
BOARD REVIEW

Board Review (BD) ensures that the school Board is continually kept abreast of the progress of the strategic planning process. The updating process could be via formal presentations at periodic intervals, or through ongoing reporting by the Superintendent <u>or</u> Board-designated strategic planning point-person(s).

The Board is encouraged to share its views regarding the ongoing planning process and emerging outputs; however, the Board is urged to defer formal action on the strategic plan until it is presented by the Superintendent for formal adoption at the end of the planning process.

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DATE
18-Oct 22
29-Nov-22
13-Dec-22*
10-Jan-23*
21-Feb-23
28-Mar-23
25-Apr-23
9-May-23*

* short update

Planning Calendar
COMMUNITY FORUMS
by Magisterial District & At-Large

Community Forum (CF) provides every resident an opportunity to participate in and influence the direction of the strategic plan prior to its completion and formal adoption by the Board. Community Forums are "reality check" sessions that are held at multiple times and in multiple locations throughout the community.

The insights from the Community Forums are shared with the Core Planning Team for integration into the strategic plan, as appropriate.

DATE	DURATION	IN-PERSION / VIRTUAL?	# PEOPLE	TEAM
Dec-Jan*	1.5 hours	In-Person		CF - MD A
Dec-Jan*	1.5 hours	In-Person		CF - MD B
Dec-Jan*	1.5 hours	In-Person		CF - MD C
Dec-Jan*	1.5 hours	In-Person		CF - MD D
Dec-Jan*	1.5 hours	In-Person		CF - MD E
Dec-Jan*	1.5 hours	In-Person		CF - MD F
Dec-Jan*	1.5 hours	In-Person		CF - MD G
Dec-Jan*	1.5 hours *tentative	In-Person		CF - MD H
Dec-Jan*	1.5 hours	In-Person		CF - MD I

Planning Calendar
STUDENT VOICE
by School & Region

Student Voice (SV) will take several forms in the FCPS strategic planning context, designed to embrace diversity of student background and experiences (e.g., demographic, academic, attitudinal, achievement, etc.)

Opportunities for student voice include:
- Online survey of students in grades 3-12
- Principal-led discussion at each school
- Focus group sessions with representative cross-school samplings of elementary, middle, and high school pupils
- Students serving on the Core Planning Team (see Core Planning Team calendar for dates)

Together, these avenues infuse the voices and experiences of the students in the planning process.

DATE	DURATION	IN-PERSION / VIRTUAL?	# PEOPLE	TEAM
Oct - Nov				SV-Survey
Oct - Dec				SV – School Talk
Oct - Dec				SV – Elem Focus Group
Oct - Dec				SV – Middle School Focus Group
Oct - Dec				SV – High School Focus Group

Planning Calendar
CORE PLANNING TEAM

Core Planning Team (CPT) consists of a cross-section of all stakeholders, including students whenever possible. Because the team includes internal and external stakeholders, it takes the lead in setting the broad direction for the plan, including the Portrait of a Graduate; Vision, Mission, and Core Values; Goals, Measures and Benchmarks of Student Success; the "Four Pillars" (or building blocks) of educational practices, programs and structures; educational strategies; and the roadmap for disciplined implementation of the strategic plan.

The Core Planning Team cuts across <u>all</u> stakeholder-groups. The team could be as large as 150 people who make a commitment of 6-8 days to the planning exercise.

DATE	DURATION	IN-PERSION / VIRTUAL?	# PEOPLE	TEAM
Nov-Dec	Full-day	In-person	100+	CPT
Nov - Dec	Full-day	In-person	100+	CPT
Jan	3 hours	Virtual	100+	CPT
Jan	3 hours	Virtual	100+	CPT
Feb	Full day	In-person	100+	CPT
Feb-Mar	3 hours	Virtual	100+	CPT
Mar	3 hours	Virtual	100+	CPT
Mar-Apr	Full-day	In-person	100+	CPT
Apr	3 hours	Virtual	100+	CPT
Apr	3 hours	In-person	100+	CPT
Apr	Full-day (T)	In-person	100+	CPT

Planning Calendar
INSTRUCTIONAL FOCUS TEAM

Instructional Focus Team (IFT) takes the lead in identifying the professional practices that will enhance instructional effectiveness. The team consists of a representative sampling of all teachers (if possible, at least one teacher from each school); counselors; instructional aides; principals and other school administrators, and district-level teaching & learning coaches, facilitators, support staff, etc.

The team could be as large as 100 people, who make a commitment of 5-6 days to the planning exercise.

DATE	DURATION	IN-PERSION / VIRTUAL?	# PEOPLE	TEAM
Dec	Full-day	In-person	80+	IFT
Dec	Full-day	In-person	80+	IFT
Jan	3 hours	Virtual	80+	IFT
Feb	3 hours	Virtual	80+	IFT
Feb-Mar	3 hours	Virtual	80+	IFT
Feb-Mar	3 hours	Virtual	80+	IFT
Mar-Apr	Full-day	In-person	80+	IFT
Mar-Apr	3 hours (T)	Virtual	80+	IFT

Planning Calendar
ALIGNMENT TEAM

Alignment Team (AL) consists of key decision-makers or opinion shapers from the key institutions within the community (e.g., school system, parent & community leaders, union, business/higher education, community-based organizations, governmental entities, faith-based groups, etc.). The team size, membership, scope of involvement, or formal vs. informal structure depends on the local context and need.

For FCPS, we recommend two Alignment Teams: One group – Equity Stakeholders – is already constituted and in operation, with about 25 participating organizations. The second Alignment Team will consist of representatives from stakeholders such as the business, military, HOA's, local government, service providers, other CBOs.

DATE	DURATION	IN-PERSION / VIRTUAL?	# PEOPLE	TEAM
Nov-Dec	2 hours	In-person	25	**ALT-Team X**
Jan	2 hours	Virtual	25	**ALT-Team X**
Feb	2 hours	Virtual	25	**ALT-Team X**
Apr	2 hours	In-person	25	**ALT-Team X**
Nov-Dec	2 hours	In-person		**ALT-Team Y**
Jan	2 hours	Virtual		**ALT-Team Y**
Feb	2 hours	Virtual		**ALT-Team Y**
Apr	2 hours	In-person		**ALT-Team Y**

Planning Calendar
PRINCIPALS/ADMIN TEAM

Principals/Administrators Team (P/A) provides school and district-level administrators an avenue for staying abreast of and guiding the work of the other groups, particularly since these school and district leaders will be directly responsible for overseeing the implementation of the plan.

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DATE	DURATION	IN-PERSION / VIRTUAL?	# PEOPLE	TEAM
Oct-Nov	2 hours			P/A
Nov-Dec	2 hours			P/A
Jan	2 hours			P/A
Feb	2 hours			P/A
Apr	2 hours			P/A

Planning Calendar
SCHOOLS/DEPARTMENTS

School/Department "Reality Check" (S/D) offers all district employees – at the school site or in district support position – an opportunity to provide input and feedback prior to the formal adoption of the plan.

The structure of the "reality check" is flexible, as long as all staff (or groups broadly representative of all staff) have a chance to voice their perspective. Those perspectives are presented to the Core Planning Team for integration into the formal plan, as appropriate.

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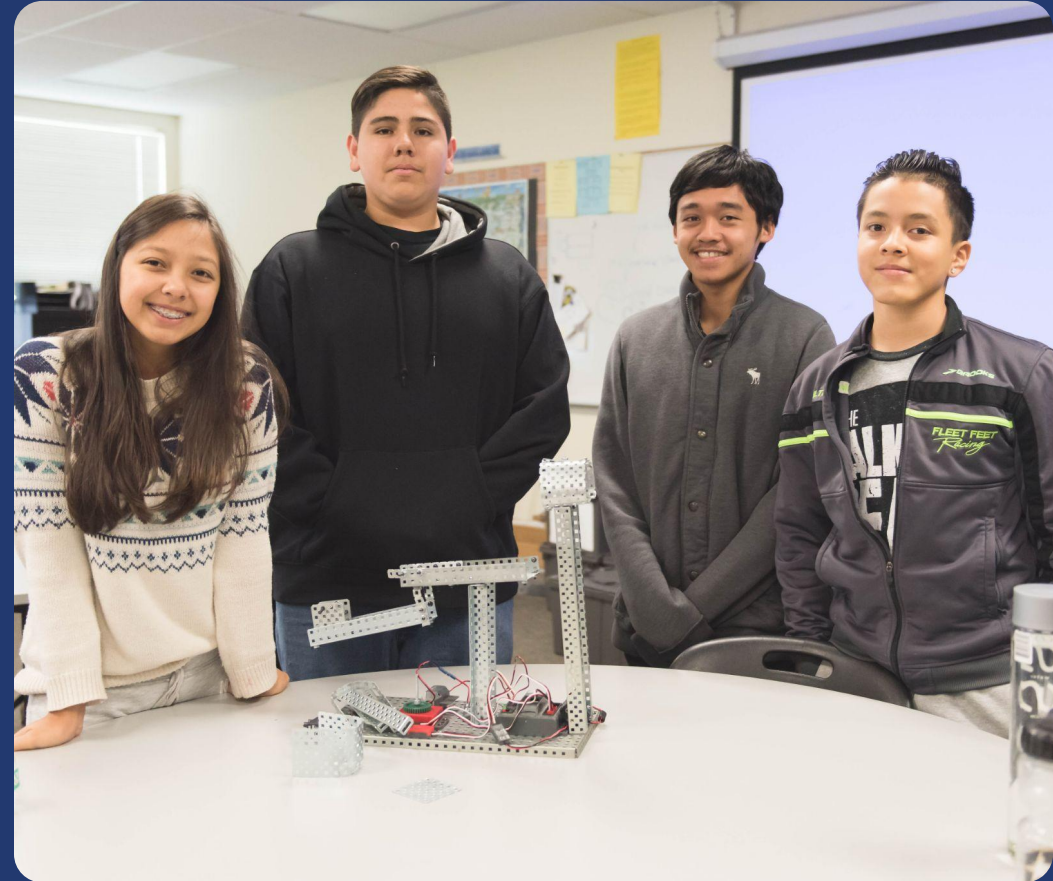| DATE	DURATION	IN-PERSION / VIRTUAL?	# PEOPLE	TEAM
Oct	1.5 hours			S/D
Dec	1.5 hours			S/D
Feb	1.5 hours			S/D
Apr	1.5 hours			S/D
May	1.5 hours			S/D

Planning Calendar
SUPERINTENDENT'S LEADERSHIP TEAM

The *Superintendent's Leadership Team (SLT)* provides executive oversight for the entire strategic planning exercise. Membership of the team is at the Superintendent's discretion: it could be limited to the Superintendent's Cabinet, or extended to include representative stakeholders (e.g., Board member, lead-principals/-administrators).

DATE	DURATION	IN-PERSION / VIRTUAL?	# PEOPLE	TEAM
Oct				SLT
Nov				SLT
Dec				SLT
Jan				SLT
Feb				SLT
Mar				SLT
Mar				SLT
Apr				SLT
Apr				SLT
May				SLT

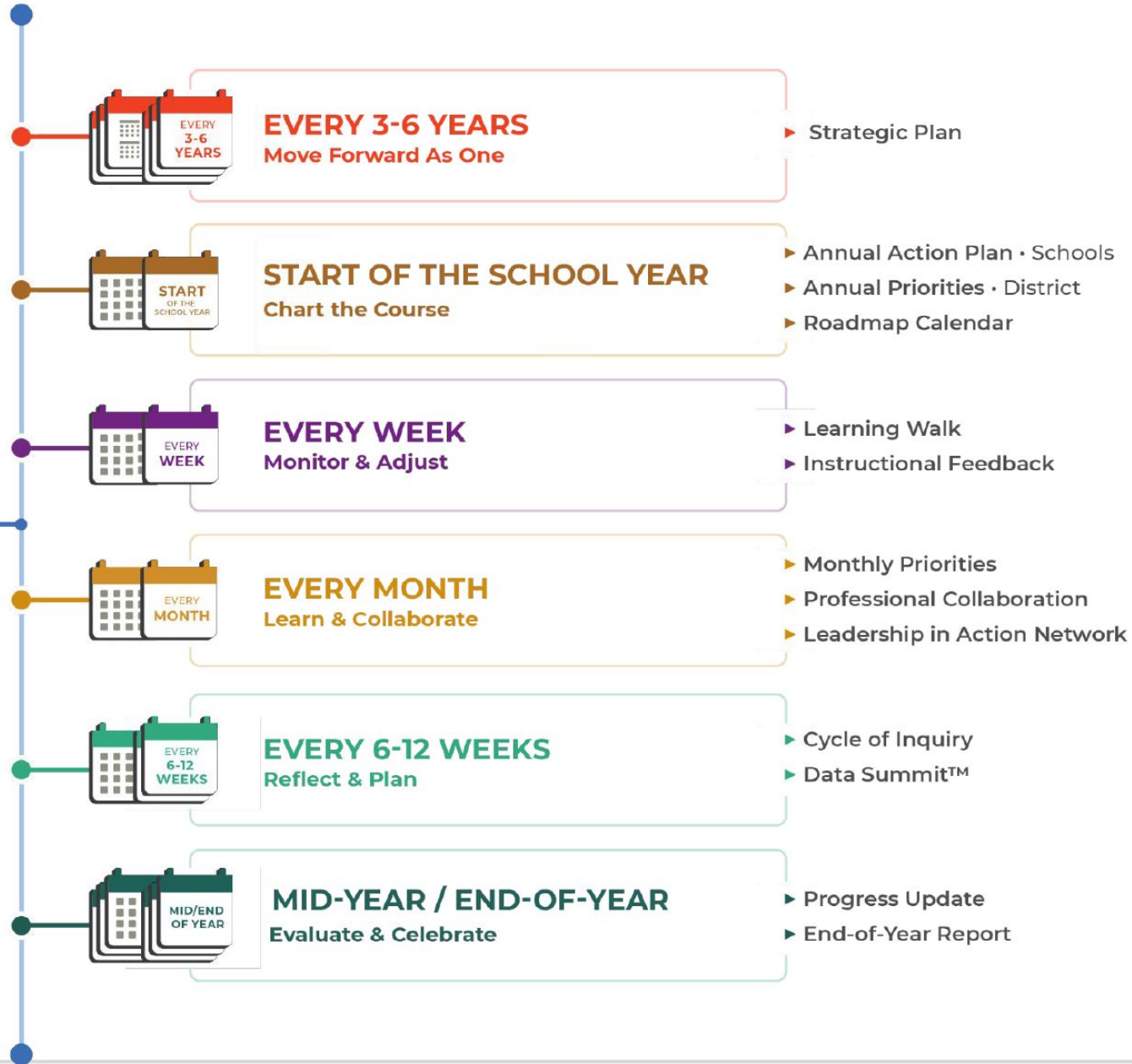# Roles & Responsibility | Project Management | Facilitation | Coordination

Roadmap for Disciplined Implementation

EVERY 3-6 YEARS
Move Forward As One
→ System-wide Strategic Plan

START OF THE SCHOOL YEAR
Chart the Course
→ Annual School Improvement Plan

EVERY WEEK
Monitor & Adjust
→ Instructional Feedback & Support; Learning Walk

EVERY MONTH
Learn & Collaborate
→ Professional Development; "PLC"

EVERY 6-12 WEEKS
Reflect & Plan
→ Cycles of Inquiry
• 6-12-Week Instructional Plan
• Data Summit

MID-YEAR / END-OF-YEAR
Evaluate & Celebrate
→ Midyear/End-of-year Review & Celebration

ANY TIME
Motivate & Facilitate with Data

EYE ON THE GOAL™
Disciplined Practices. Extraordinary Results.

Roadmap
for Disciplined Implementation

ANY TIME
Motivate & Facilitate with Data

▸ Student Voice

▸ Vital Signs Scorecard™

▸ CPR Card™ (Continuous Progress Report Card)

ANY TIME

EVERY 3-6 YEARS
Move Forward As One

▸ Strategic Plan

START OF THE SCHOOL YEAR
Chart the Course

▸ Annual Action Plan · Schools
▸ Annual Priorities · District
▸ Roadmap Calendar

EVERY WEEK
Monitor & Adjust

▸ Learning Walk
▸ Instructional Feedback

EVERY MONTH
Learn & Collaborate

▸ Monthly Priorities
▸ Professional Collaboration
▸ Leadership in Action Network

EVERY 6-12 WEEKS
Reflect & Plan

▸ Cycle of Inquiry
▸ Data Summit™

MID-YEAR / END-OF-YEAR
Evaluate & Celebrate

▸ Progress Update
▸ End-of-Year Report

After you
*"**plan the work**,"*
then, you must
*"**work the plan**"*
to achieve
desired results.

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APPENDIX

The action sequence and the dates on the pages that follow are for illustrative purposes only. While the Phases and most of the step-by-step apply to most Strategic Planning exercises, Performance Fact collaborates with each client to customize a scope and sequence and calendar to fit their local context.

Phase 1: "Is everyone ready to go?"
Mobilization of the entire school community to provide information about the strategic planning process, solicit input, and agree on the path forward.

When	What	Who / By Whom
October – November	a. Conduct pre-planning sessions with Superintendent and Cabinet (and stakeholders, as appropriate) to determine specific strategic planning timeline, deliverables, and engagement process. b. Secure buy-in and commitment of Board of Education. c. Secure support and commitment of leaders/champions of key stakeholder groups (e.g., PTO/PTA; Faith-based organizations; Community leaders; Employee Unions; business & higher education; as appropriate). d. Identify Core Strategic Planning Team Membership (i.e., Superintendent & Cabinet; credible and representative cross-section of the district's internal and external stakeholders). e. Identify specific communication methods to inform the school community of the strategic planning process with opportunities for input (i.e. web site, surveys, town meeting schedules). f. Finalize strategic planning calendar. g. Compile baseline data about student learning and professional practices (3-5-year analysis).	Superintendent / Cabinet Board of Education District & School Leaders Prospective members of the Core Planning Team and Alignment Team (internal & external stakeholders)

Phase 2: "Where are we now?"

Data-driven assessment of current state, in such areas as: student growth and academic achievement; trust; effectiveness of teaching-&-learning; management and organization of operations and resources; and extent to which a high-trust, standards-driven, accountable culture is evident.

When	What	Who / By Whom
November-December (2 days) Ongoing work with Supt / Cabinet between Team meetings	a. Convene first session of the Core Planning Team: b. Compile student data from multiple perspectives, including those relating to academic performance, academic tenacity, and socio-emotional resiliency. c. Analyze current state of student learning using Performance Fact's 4-Lens Data Analysis Protocol™. d. Identify the highest-priority Student Achievement Areas of Strength and Areas of Concern based solely on the data. e. Assess current state of educational programs in the content areas, based on the six components of a standards-aligned instructional system, namely: standards; assessment; curriculum; instruction; instructional materials; and intervention. f. (Optional) Conduct extensive "listening sessions" with teachers, students and school leaders regarding current state. g. (Optional) Gather input from selected internal and external stakeholders regarding current state (e.g., via surveys or focus groups). h. Use a prescribed rubric to conduct "root cause" analysis of the current state of student achievement and professional practices.	Core Planning Team Alignment Team (Optional) Selected "expert" with particular insight into the topics to be covered

Phase 3: "Where are we going next?"

Strengthening trust and authentic relationships, and reaching unity of purpose regarding the strategic direction for the district, including: clarifying purpose and shared values; setting 'achievable stretch' goal for student learning; selecting the vital signs of student progress; and affirming trust in the goal.

When	What	Who / By Whom
November – December (part of 2-day session for Phase 2) Ongoing work with Supt / Cabinet between Team meetings	a. Strengthen trust and authentic relationships among participants and identify the conditions for building a high-trust organization. b. Reaffirm the core purpose and shared values of the district. c. Clarify the "achievable stretch" goal for student learning, and define the vital signs of student progress along three dimensions: academic growth, academic tenacity, socio-emotional resiliency. d. (Optional) Gather input from selected internal and external stakeholders to provide additional input (e.g., via surveys or focus groups).	Core Planning Team Alignment Team (Optional) Selected "experts" with particular insight into the topics to be covered

Phase 4: "Is everyone still with us?"

First formal 'reality check' to enroll stakeholders, including sharing status of the planning process; assessing buy-in and commitment to the Goal and vital signs of student learning; soliciting feedback regarding mission, mission and shared values; and individual and group commitment to the next steps.

When	What	Who / By Whom
December -- January Ongoing work with Supt / Cabinet between Team meetings	a. Develop Briefing Packets to be used during 'reality check' sessions with stakeholder groups. b. Provide training and orientation for Core Planning Team members regarding how to conduct effective 'reality check' sessions with stakeholders. c. Hold "Reality Check" sessions with critical stakeholders, including Board of Education; site administrators; teachers and staff; union leadership; parent leadership; business/community leadership; student leadership. d. Compile and analyze feedback from 'reality check' sessions, and determine modifications/adjustments to work-to-date based on the stakeholder feedback.	Core Planning Team Alignment Team "Reality check" rollout of work-to-date with internal and external stakeholders, including: i. Every school ii. Every district-level unit or department iii. Selected external stakeholders

Phase 5: "How are we going to get there?"

Key capabilities we need and must develop to achieve the goal. This includes learning about what is important and what works; completing the 4-page Instructional Focus; selecting strategies and programs that fit the schools and district and offer the best opportunity for achieving the goal; and outlining key activities and tasks.

When	What	Who / By Whom
January – February (2-day session; then a 1-day session) Ongoing work with Supt / Cabinet between Team meetings	a. Identify the "Four Pillars" of the Instructional Focus and define corresponding professional practices and programs (i.e., the educational capabilities we need and must develop in order to accomplish the student learning Goal.) b. Identify the strategic priorities relating to Empowering Infrastructure (i.e., operations, supports and services), in areas such as: facilities; fiscal; human resources; teacher induction; technology; planning; teacher & leadership effectiveness; parent/community partnership and engagement; community support systems for children, youth and families). c. (Optional) Schedule focused conversations with representative groups of students (elementary, middle, high school; if possible, graduates and drop-outs) d. Compile the first draft of the high-leverage strategic priorities and programs. e. Outline process and 'briefing packet' for sharing draft strategic priorities and programs with selected stakeholders for feedback.	Core Planning Team Alignment Team (Optional) Selected "expert" with particular insight into the topics to be covered

Phase 6: "Have we aligned our resources with the Plan?"

"How do we keep our eye on the prize, nurture the spirit, and stand up for the outcomes we produce?" Allocation (or re-allocation) of people and resources based on the priorities outlined in the Plan and accompanying performance accountability guidelines.

When	What	Who / By Whom
February – March (1/2-day session with Core Planning Team & Alignment Team, if needed) Focused discussion with Superintendent / Cabinet	a. Realign district resources (people, time and money) to the priorities outlined in the Strategic Plan. b. Propose modifications to the district school improvement planning and central operational planning processes. c. Develop guidelines and processes for ensuring performance accountability at all levels, including processes for continuous monitoring and evaluation; interventions and mid-course corrections; and recognition and celebration of accomplishments. d. Recommend structure and process for building and sustaining public will for and commitment to disciplined implementation of the Strategic Plan (e.g., by creating a Community Roundtable for Performance & Accountability, comprised of leaders of key stakeholder groups). e. Outline process for Superintendent's periodic progress updates to Board and community (e.g., every trimester).	Core Planning Team Alignment Team Superintendent / Cabinet Board of Education

Phase 7: *"Do we have the support of our leaders and policymakers?"*

Leadership approval of and commitment to the goal, including provision of district resources, assistance with mandates outside the school's direct influence, and facilitation of community supports and services.

When	What	Who / By Whom
March – (2-hour roll-out session to Core Team & Alignment Team, if needed) *Focused discussion with Superintendent / Cabinet, Principals, and district-level managers*	a. Complete final strategic plan. Begin discussion with Superintendent regarding disciplined implementation of the strategic plan and "making the form fit the function" (e.g., alignment of annual school improvement and district annual operating planning processes; continuous monitoring; accountability for results; etc.). b. Facilitate formal approval of the strategic plan by the Board, and formal rollout to all stakeholders. c. Define focus of early-implementation phase and facilitate execution of the selected recommendations. d. Define preliminary priorities for Year 1 of the strategic plan (including performance objectives and milestones of progress for schools and central office units; process for monitoring progress throughout the school year; calendar and framework for status reports to the Board and community every trimester; etc.). e. Facilitate formal roll-out of the Strategic Plan, including review by and appreciation for Core Planning Team and Alignment Team members, enrollment of school and district staffs, commitment of parents and community stakeholders.	