Overview of SIP/DIP Planning and Larger Strategic Planning 2023-24
Feedback Welcome on this document—if a date is problematic I would like to know early!

Timing	With Who	What	Action Required
June 28 & 29	Administrative Council Team Retreat	- Mapping of lived initiatives - Creation of state of union data ideas - Draft of 1-year district improvement goals - Early entry and thoughtexchange sharing and analysis - Desired state future descriptions	Anna provides draft of district goals based on analysis of building SIPs and administrative retreat This document is then shared to workshop with school committee in summer retreat

July	Principals and Central Department Leadership	● All: Align year of work and PD to district goals ● Principals: plan advance work for Profile of a graduate (POG) ● Share topics for secret sauce podcast, blog and excellence feed	Begin to identify who will represent your school on POG work. How will you talk about this with staff as a whole? Families? Students? Names, topics to Anna
	School Committee and Anna	● Central & Anna: School committee retreat 1 day ● Central & Anna: Union negotiations 1 day ● Anna and SC: operating agreements/requests for info, communication, calendar of meetings, governance rubric and goals, trust discussions, 1 day	Feedback on district goals from SC Compact for collaboration
	Anna with Central Team	● Anna continues entry meetings, mapping assets, community meetings, reading, creation of district dashboard of assets and needs (backdrop to entry plan report) ● Facilities visits ● Social media and blogs as backdrop to important work being conducted and political work to do ● Create opening day experiences focused on return to school, not union actions ● Visit and celebrate tech PD ● Learn new Literacy Curriculum ● Develop process for joint school visits/instructional visits	Report creation and sharing continuously with ad council and SC Community outreach

August 26, 21-22, 24, 25, 27, 28	Administrative Leadership Team, School Committee	● Leadership Retreat Collaborative Workshop (1 day) and Back to School workshops. Anna reports to leaders and to SC (separately and together)	Hire terrific people, communicate their credentials/excellence
	Principals		Data set agreements aligned to district goals (and those we will track for district health) If tweaks need to be made to SIP, they should be made this month.
All month			
	Anna	● Observe summer PD in action (CRP, Literacy, new lit curric, writing pd), participate in new teacher orientation Orient SC to School Improvement Plans and how they align to the district goals Plan and execute opening day convocation and professional development with PTOC and our students.	Sharing the workshopped district goals, updates in legal, HR and district direction/vision, data collection, communication and instructional visit schedule
	Anna, on the city BBQ circuit…meeting with community groups	Meet and greets scheduled thus far (through end of August)	

September-October	All Leaders	- Open School! - School site visits with instruction and operations live/schools open - Start instructional joint visits - Final review of your SIP with school council - Planning of November leadership retreat	Hire terrific people, communicate their credentials and excellence, feature students and staff in a steady diet of sharing,
	Anna and SC, Central	Anna's goals and evaluation areas/district goals set School Committee Votes SIPs (end of Sept)	Inform school staff of data to be collected as a district, develop systems with reporting in March and June to community *(in the future, our data workshops in summer will inform key areas for goal setting, you may know some now from your own data sets)*
	Principals	Set student learning and professional practice goals aligned with SIP and District Goals by October deadline	
	Anna	Shares entry planning findings (end of October)

Overview of the strategic planning and profile of a graduate process

Possible bid for strategic planning services | Anna, takes findings on the road to community, etc. |

November	Principals' retreat with 1 day of Central retreat	Entry planning sharing, review of year long agenda of academic and district goal plans for the school committee and your role in them Staffing and budget updates and backdrop to budget season	Develop key messaging before budget season, caseload analyses begin, 90 day staffing meetings for new staff
December	All stakeholders: staff, students, SC and community members	Assemble district and community POG team of stakeholders	Battelle for Kids will consult and facilitate
January	All stakeholders: staff, students, SC and community members	Profile of a Graduate Meetings Begin Budget Process and Communications	Begin to use the emerging POG competencies to drive budget messaging Caseload and resource mapping and analysis continue, particularly staffing/enrollment
February			
March xx and xx	Principals, Central and invited guests (data staff, department heads, literacy, math and SEL specialists—whoever can best	State of the Schools Meetings Elementary Secondary	Presentations on district goals begin with SC

	represent your school's data)		
April	Central and other leaders		Presentations on district goals continue
May/June	Principals, central staff, department heads, data teams, SITs, specialists (lit math sel)	Staff process data, analyze for progress, needs, wrap up of progress on student learning and professional practice goals Collect on our agreed upon data sets	Presentations on district goals finish Anna's public evaluation on goal completion
June 26 and 27	Same people here today—unless we determine other guides and guests are needed.	End of Year Administrative Council and Central Retreat (like this one), two full days. Do not plan vacation during this time.	
July 12 and 19	Principals, Central and invited guests (data staff, department heads, literacy, math and SEL specialists—whoever can best represent your school's data)	Elementary on the 12th, Secondary on the 19th, aligned data analysis and review of the year –State of the Schools Part 2	

Key Descriptions/Shared Vocabulary for Strategic Planning

The **Desired State** represents specific changes in conditions rather than project goals or outcomes. It requires specific descriptions of things that will be different.

For example, a goal might be that students in introductory STEM courses feel that they are part of a community. **A Desired State would be the concrete things that you will create with your project in this community, such as student cohorts in introductory STEM courses (District level), welcoming study spaces within each STEM department (Department/School level level), and instructors of introductory STEM courses using collaborative group work (Individual level).**

Desired States can occur at different levels of the system.

For the sake of simplicity, let's use these:

External (Community, Parents, World)

District

School

Department/program/grade level

Individual (Staff and Students)

Tip: Desired State

A Desired State should reflect a change in conditions rather than an outcome. Useful desired states help you decide what to do. Not useful desired states simply restate aspects of your goal.

Useful:

- Physical space available for undergraduate research participation
- New faculty hire in target area
- Dedicated advising program for the major with advisors informed about new curriculum

Not useful:

- Student buy-in
- Increased enrollment in target courses
- Clear path to student success

These less useful statements represent goals more than conditions. What conditions will need to be in place to support increased enrollment? What will student buy-in actually look like?

The important thing about explicitly showing a variety of levels is to understand the different elements of your particular system, and the important impacts of each level on your change project.

Common Vocabulary for Strategic Planning

Strategic Planning Terms, Definitions and Probing Questions

	Definition	Probing Questions

GOAL	• A goal is a broadly stated, non-measurable change in a priority.
	• It describes in broad terms a desired outcome of the planning initiative.
	• **Characteristics of Goals**
	  – Global in nature; provide general direction
	  – Non-specific
	  – Non-measurable; cannot be quantified
	  – Long-term
	  – Can be lofty and idealistic, as it is not necessary that a goal be reached during a specific time frame
		a. What is the desired state or outcome for this priority area?
		b. What are we trying to achieve for our region/organization/ team?
		c. What do we need to do in this priority area to significantly change the current state and move toward a desired state?

OBJECTIVES	• Objectives state how much of what you hope to accomplish and by when; usually start with INCREASE, DECREASE, ENHANCE, IMPROVE...
	• Are **SMART**:
	  Specific: does it clearly state what will be achieved?
	  Measurable: is it measurable? How will I know when it is accomplished?
	  Achievable: is it action-oriented and attainable?
	  Realistic: is it realistic with the resources you have?
	  Time-bound: when will it be achieved?
	
	GOALS and OBJECTIVES describe the "**WHAT**" of your plan. GOALS are broad and OBJECTIVES lend specificity and precision to the goal.
		a. What do we mean by this goal area? How would we break it down into its three most important parts? Or what are the three biggest ideas that feed into this goal statement?
		b. Sometimes it helps to literally break the goal statement out into clauses and ask: What do we mean by this clause? What are we trying to achieve here?

SUCCESS MEASURES	• Measure(s) of progress or completion of a goal or objective. These measures ultimately let your team know if the goal or objective was successful in impacting the priority.	

STRATEGIES	• Strategies are:
	  – Specific ways to meet each of the objectives
	  – An approach to getting things done – a statement of **HOW** an objective will be achieved
	  – Something that identifies the general direction of the specific action steps
	• Strategies begin with words such as "identify," "advocate for," "support," "develop," "train" and "educate."
		a. What do we need to do to achieve this goal and objective?
		b. Will these strategies, when combined, fulfill our objective and goal?

Structures vs. Cultures

There are two basic types of Desired States that can occur at each system level: **structures and cultures**.

Structures are more concrete things that can be directly measured or observed.

- For example, you can directly observe whether an undergraduate lounge exists in a department where students are able to hang out, study, and interact with one-another.

Cultures can be more difficult to define. The literature contains careful definitions of culture (e.g., Burke, 1992; Burnes, 1996). However, for the purposes of the Dashboard, the careful definitions of culture are not particularly important. We simply think of culture as the more subtle aspects of the Desired and Current States that tend to be harder to directly measure or observe.

- For example, a department may have a culture where students in introductory courses do not feel welcome to enter the undergraduate lounge. This is different from a structural issue, such as a policy that restricts the lounge to upper-level students. Such a culture could even conflict with a formal policy that invites and encourages introductory students to use the lounge.

When structures and cultures conflict, it is usually the culture that dominates (Groysberg, Lee, Price, & Cheng, 2018). Table 1 identifies common aspects of structures and cultures in academic institutions based on the work of Eckel & Kezar (2003). This can be a useful place to start and trigger ideas relevant to your project.