

The Importance of Having A Clear Roadmap:

How to Develop & Live Out Your Strategic Plan
to Move Your System Forward

MASA Aspiring Superintendents' Academy May 2021

Jamie Nord, Executive Director & Nicole Woodward, Director of Special Education





LEADERSHIP TEAM VOICE

NURTURER

The **HEART** of your team.
Champs of people and genuine relationships.
Present oriented.

PIONEER
The **MIND** of your team.
Champs of vision and winning.
Future oriented.

CREATIVE

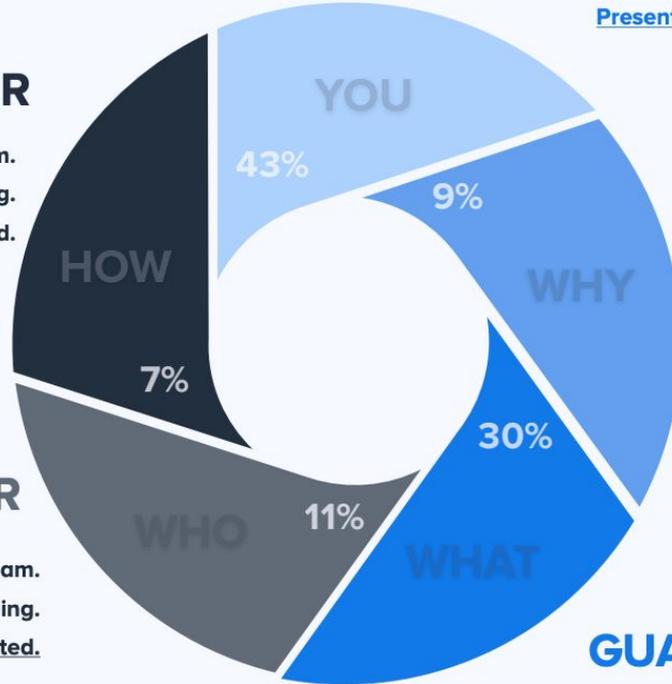
The **SOUL** of your team.
Champs of innovation and ingenuity.
Future oriented.

CONNECTOR

The **ENERGY** of your team.
Champs of relational networks and messaging.
Future oriented.

GUARDIAN

The **MUSCLE** of your team.
Champs of due diligence and systems.
Present oriented.



Jamie Nord

“Pioneer”
Strategic Vision

LEADERSHIP STATEMENT

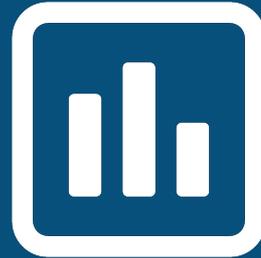
“I need you to respect my competence and my strategic acumen. Don’t judge me for being competitive and wanting to change the world. Invite me to help you solve your complex problems - I love doing that! Encourage me to dream beyond what other’s believe is possible and then believe that I can help make it happen.”

Nicole Woodward

“Connector”
Networks

LEADERSHIP STATEMENT

“Celebrate life with me and understand that at my best, I don’t separate work, rest, and play easily. Regularly ask me what I am excited about and allow me to tell you my stories. Never stop believing in me, appreciate my strategic connections and encourage me to keep dreaming about changing the world and expanding our influence.”



Learning Targets

1. Participants will understand the “why” behind having a strategic plan.
2. Participants will explain the basics of strategic planning.
3. Participants will become familiar with a process for strategic planning and identify how it can be adapted in their context.
4. Participants will identify activities that can be used to help their organizations live out their strategic plan.

OUR Strategic Plan JOURNEY

2015-16

**Developed Plan
& Began
Implementation**

2016-17

**Enhanced
Employee
Understanding
& Buy-In**

2017-18

**Initiated Annual
Reflection and
Planning Process**

2018-19

**Continued with
Implementation**

2019-20

**Engaged in
Strategic Plan
Refresh Process**

2020-21

**Initiated
Refreshed Plan
with More
Intentional
Communication to
Stakeholders**

2015-20



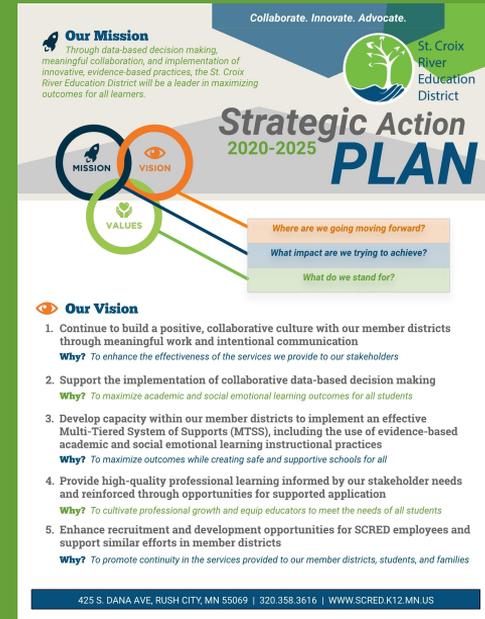
The St. Croix River Education District (SCRED) is an education organization that provides services to six member school districts – Chicago Lakes, East Central, Hinckley-Frisleyton, North Branch, Pine City and Rush City. SCRED also serves TRIO Wolf Creek Charter School and the programs hosted by its member districts (SOAR, Pathway to Change, and Vision, The Chicago County Life Work Center, and The Pine County Transition Program). Guided by a strategic action plan developed with member district staff and administration, SCRED offers high quality professional learning experiences and on-site support and consultation that promote collaboration and innovation in education while advocating for the unique learning needs of all students.

Our Five Year -VISION-

- COLLABORATE**
 - Establishing effective teams to make data-based instructional decisions that result in positive academic and behavior outcomes for all students.
 - A positive collaborative culture between SCRED and member districts including strong communication with stakeholders.
- INNOVATE**
 - Demonstrating leadership in evidence-based instructional practices within a Multi-Tiered System of Support (MTSS) framework.
 - Demonstrating progressive leadership in the area of mental health through implementation of best practices and effective school-based programming.
- ADVOCATE**
 - Providing high quality professional learning opportunities informed by district needs and reinforced by building-specific action planning.
 - Establishing strong staff recruitment and retention practices for SCRED employees.

Original

2020-25



Collaborate. Innovate. Advocate.

Our Mission
Through data-based decision making, meaningful collaboration, and implementation of innovative, evidence-based practices, the St. Croix River Education District will be a leader in maximizing outcomes for all learners.

St. Croix River Education District

Strategic Action PLAN 2020-2025

MISSION VISION VALUES

Where are we going moving forward?
What impact are we trying to achieve?
What do we stand for?

Our Vision

- Continue to build a positive, collaborative culture with our member districts through meaningful work and intentional communication
Why? To enhance the effectiveness of the services we provide to our stakeholders
- Support the implementation of collaborative data-based decision making
Why? To maximize academic and social emotional learning outcomes for all students
- Develop capacity within our member districts to implement an effective Multi-Tiered System of Supports (MTSS), including the use of evidence-based academic and social emotional learning instructional practices
Why? To maximize outcomes while creating safe and supportive schools for all
- Provide high-quality professional learning informed by our stakeholder needs and reinforced through opportunities for supported application
Why? To cultivate professional growth and equip educators to meet the needs of all students
- Enhance recruitment and development opportunities for SCRED employees and support similar efforts in member districts
Why? To promote continuity in the services provided to our member districts, students, and families

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Refreshed

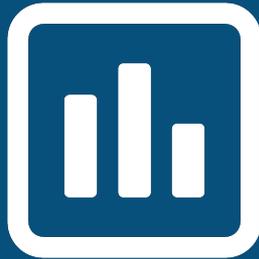
WHY

A Strategic Plan

My Top Three

1. Direction
2. Focus
3. Continuous Improvement

What is a strategic plan?



Live Results

Definition

Strategic planning is a systematic process of envisioning a desired future, and translating this vision into broadly defined goals or objectives and a sequence of steps to achieve them. Strategic planning begins with the desired-end and works backward to the current status.

*“Strategic planning helps determine the **direction and scope of an organization** over the long term, **matching its resources to its changing environment** and, in particular, its markets, customers and clients, so as to **meet stakeholder expectations.**”* Johnson and Scholes, 1993

What are the key components?



Mission



Why do we exist as an organization?



Vision



What must we become to accomplish our purpose?



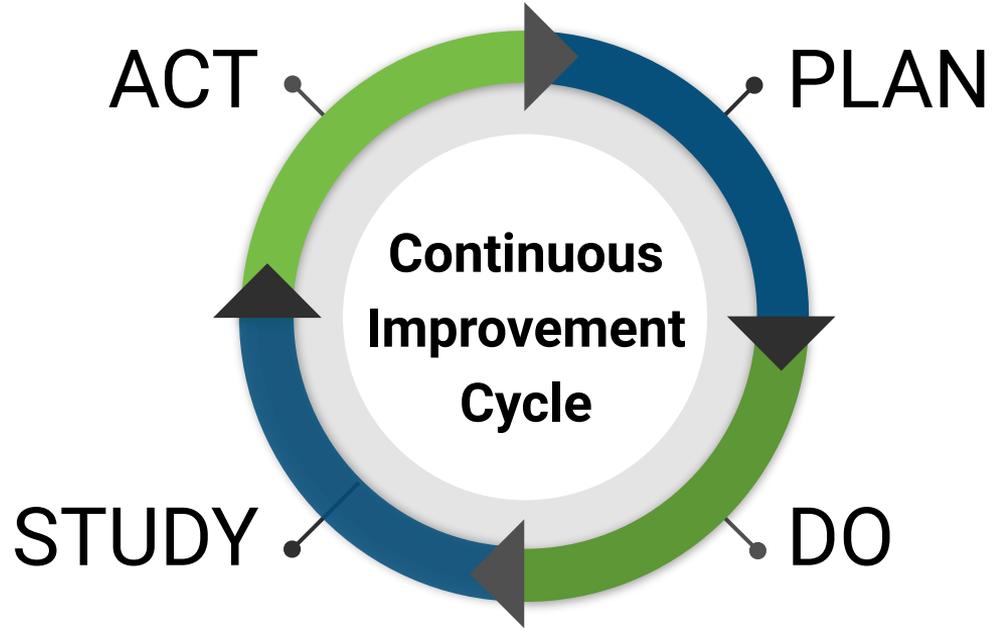
Goals



How will we track our progress?

**What does it look like
in practice?**





PLAN DEVELOPMENT

Capturing All the Voices

Plan Development Process

Consulted with [Big River Group](#) - Bruce Miles

1. Pre-Planning Activities

- Emailed short survey to all stakeholders
- Summarized and analyzed survey results
- Pulled together historical information about organization

Stakeholder Survey

1. Please identify your role within SCRED.
2. What 2-3 things are going well within SCRED & provided services?
3. What 2-3 things need to be worked on or improved?
4. What should SCRED look like in 3 to 5 years (your Vision for SCRED)?
5. What should SCRED take on as near-term priorities in next 12-18 months?

Plan Development Process

2. Planning Sessions (1 day = four 2-hour sessions)

- Selected district staff & identified SCRED staff - “end users”
 - Briefly review survey summaries & organizational history
 - Identify recent successes, issues & future
 - Identify desired priorities
- Member district leaders & identified SCRED staff
 - Briefly review survey summaries & organizational history
 - Identify recent successes, issues & future
 - Identify desired priorities

Successes, Issues, & Future Activity:

Large Group Brainstorm on Board

Intended + Negative Outcome	Intended + Positive Outcome
Unintended + Negative Outcome	Unintended + Positive Outcome

Visioning Activity:

Small Groups with Large Group Share Out
Gallery Walk to “Vote” for Top Vision Statements

Step #1: Write items for your new Vision here.

In five years, we will have developed, delivered, & be recognized for...

-
-
-
-
-

Priorities Activity

Step #2: Identify between 4 & 6 near-term Priorities to get there.

1)

2)

3)

4)

5)

6)

Plan Development Process

- Member district superintendents & SCRED administrators
 - Briefly review survey summaries & organizational history
 - Review & affirm results from prior meetings
 - Select final vision
 - Select final priorities
- SCRED administrators
 - Review & affirm results from previous session

Prioritizing the Work

Implementing (priorities)	Reviewing (some items to consider)	Considering (other items)

Plan Development Process

3. Post-Session Work

- Develop specific goal work plans for new priorities
- Specify next steps: roles & responsibilities



vs.



SCRED Strategic Plan Refresh Timeline

Refresh Proposal & Coordination

Share proposal with Superintendents' Operating Committee for input and approval; coordinate input gathering process

August



September-October



End-User Input

Gather input from teachers and service providers through existing forums and google forms; create summary of results

Decision-Maker Input & Plan Refresh

Share summary of end-user input to inform facilitated discussions with administrators and governing board; develop a draft of refreshed plan

November-December



January



Plan Approval

Propose refreshed plan to Superintendents' Operating Committee and Governing Board for approval

Implementation Planning

Develop professional learning plans and the budget for 2020-21 based on refreshed plan; build organizational momentum for implementation

February - June



Plan Refresh Framework - “The 3 Cs”

Carry Forward

The first step in the process is to review our plan and assess which of our vision statements we want to carry into our plan for the next five years.

Consider carrying forward goals that meet the following criteria:

- Multi-year goals with strong performance measures, indicating the progress of your strategy over the life of the plan.
- Goals that are not completed and need to be extended into the next plan.
- An ongoing process goal continuing into the next year.
- Projects that aren't complete.

Plan Refresh Framework - “The 3 Cs”

Close Out

After reviewing and deciding which vision statements we need to carry forward, we will also need to decide which vision statements we will be closing out and not continuing into the next five years.

Goals that might be closed out at the end of our current plan might include:

- Goals that are (or will be) achieved and do not need to extend into the next five years.
- Goals that aren't complete and will not be continued in the next five years.
- Goals we no longer need or won't be relevant in the next five years.

Plan Refresh Framework - “The 3 Cs”

Create New

Looking ahead to the future of our organization, the last step in preparing our plan is creating new vision statements for our next five years.

Creating new goals is just as it sounds. A new five year plan may equate to the need for new goals that support our long-term vision of success.

Plan Refresh Process Resources

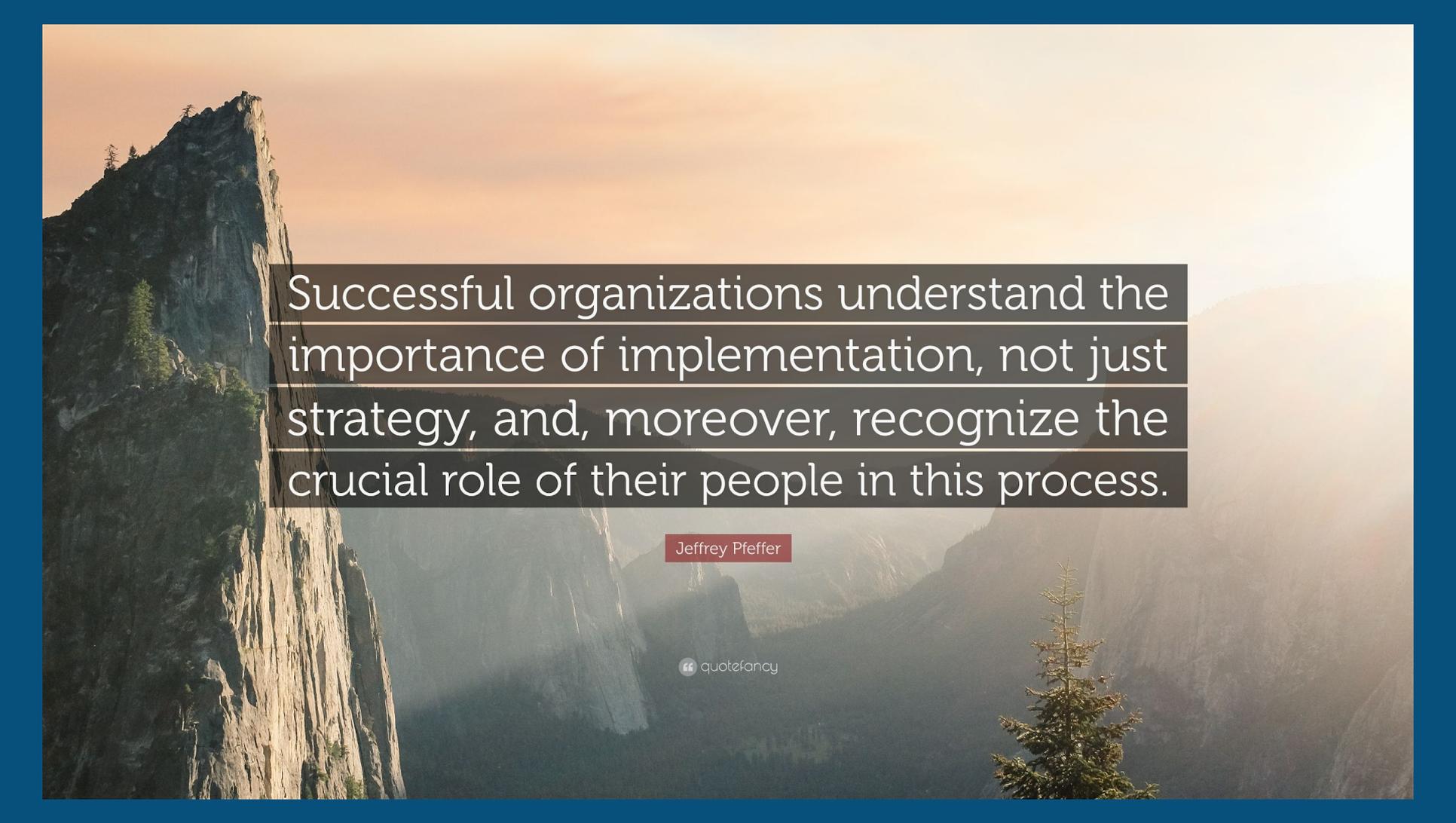
- **End-User Input**
 - In-Person (presentation with facilitated activity)
 - Electronic (intro video with survey)

What is one plan development or refresh idea you would like to dig into after today?



PLAN IMPLEMENTATION

Living Out Your Plan



Successful organizations understand the importance of implementation, not just strategy, and, moreover, recognize the crucial role of their people in this process.

Jeffrey Pfeffer

“ quote fancy

Jigsaw Activity

Three Puzzle Pieces to Implementation



Three Puzzle Pieces to Implementing Plan

1. When we **inform** people by clearly communicating the company's destination, they develop a sense of direction and focus.
 - a. Get vocal
 - b. Follow up with visuals
 - c. Update as you go along

Three Puzzle Pieces to Implementing Plan

2. When we **inspire** people by explaining why the destination is important, they develop the motivation and determination to see the race through.
 - a. Focus on the aspirational components of your goal.
 - b. Share your passion.
 - c. Show people how they are making a difference.
 - d. Celebrate milestones.
 - e. Regularly assess your communications efforts.
 - f. Strive for a balance of focus.

Click [here](#) to access full article.

Three Puzzle Pieces to Implementing Plan

3. When we **engage** people in reaching that destination, they become more willing to make decisions, take appropriate risks and act in the best interests of the organization.
 - a. Clearly define what winning looks like.
 - b. Measure what matters AND what people can relate to.
 - c. Set your employees up for success.
 - d. Give plenty of feedback and recognition.
 - e. Build an atmosphere of trust.

Click [here](#) to access full article.

5 Ways to Live Out Your Plan



Assist employees in understanding “fit”

Foundational . Self-Efficacy . Collective Efficacy



Reflection

- How does this video relate our work?
- Which tree are “we”, as SCRED, moving?
- What did you take away from the video?

SCRED Vision: Quick Talking Points

Multi-Tier System of Supports

Data Teams

Mental Health

Culture and Communication

Professional Learning

Recruitment and Retention

Activity

1. Break up into groups:

- We R Able + Carol + Jamie
- ABE + Hailey + Jamie
- Low Incidence Itinerant Staff + Nicole
- School Social Workers & School Nurses + Joel
- School Psychologists Group 1 + Heather + Nicole
- School Psychologists Group 2 + Tiff
- Low Incidence and Social Behavior Services Coordinators + Scott + Jen E.
- Early Childhood Services Coordinators + Joan + Heidi + Vicki
- Instructional Services + Kelly + Sandy + Jen D.

2. Assign a recorder for your group [three papers: How do we fit?, Progress, Next Steps]

3. Answer questions for on poster paper [reference vision statement # by responses]

4. Share out your group's "ah-has" with entire group

How do I fit within our strategic plan?

Things to consider regarding the vocabulary in the plan:

- “Teams” is used broadly (e.g., SCRED PLCs, IEP teams, Data Teams, SST teams, Problem Solving teams)
- “MTSS” includes all students, including special education students
- “Evidence-based” is a term that can apply to any area
- “Instructional” doesn’t just mean academic instruction, it can be social, behavior, adaptive, motor, communication, etc.
- “Professional learning” does not just refer to big trainings here at SCRED - think about the on-site support, coaching and consultation you provide

Recap of Previous Strategic Action Plan Activity

Each service area had opportunity to brainstorm the following:

1. How do we fit?
2. What progress have we made?
3. What are our next steps?

Goal

For all SCRED staff to feel connected to and invested in our Strategic Action Plan

Follow Up

- Took information from large post-it paper and compiled google sheet.
- Used input to develop [SCRED Annual Report 2017-18](#).
- Designed follow up activity for today's meeting

New Activity: SCRED Strategic Action Plan Bingo

Goals

- Revisit how you fit, progress made, and next steps for your specific service area
- Begin understanding how other service areas are contributing to the plan
- Have some fun with your colleagues to kick off the year!

Instructions

- Blank [SCRED Bingo card](#) located in folder
- Randomly select squares and write the following on your card until the squares are full:
 - Social Behavior (2)
 - Low Incidence (2)
 - Early Childhood (2)
 - Instructional Services (2)
 - School Psychology (2)
 - School Social Work (1)
 - School Nursing (1)
 - Support Staff (2)
 - Administration (2)
 - Adult Basic Education (2)
 - English Language Learners (1)
 - Adults with Disabilities-
We R Able (2)
 - Low Incidence Itinerant Staff (2)
 - *Pick one area to list again (1)*

Instructions

- Cross out **one** of the correct service area squares for each question
- SCRED Logo = Free Space
- How to get a Bingo?
 - First Round: vertical, horizontal, or diagonal line
 - Second Round: two lines
 - Third Round: blackout
- Need to shout out “SCRED” instead of Bingo
- Prizes will be awarded!

How Do We Fit?

We facilitate and participate in a variety of building-level data team meetings.

Establish effective teams to make data-based instructional decisions that result in positive academic and behavior outcomes for all students

ANSWER

School Psychology

Activity Wrap-Up

WHO	<u>Who</u> had fun playing SCRED Bingo?
WHAT	<u>What</u> were your biggest takeaways from this activity?
WHERE	What ah-has did you have about <u>where</u> you fit within our strategic plan?
HOW	What did you learn about <u>how</u> other service areas fit within our strategic plan?
WHY	<u>Why</u> do you think it's important for you to understand how you fit within our strategic plan and how other service areas fit within the plan?



**Empower employees to set
goals**

IGDP Reflection Activity

Write each of the follow on a separate slip of paper on your table.

1. **Progress and Next Step(s)** toward goal
2. **Connection** to **SCRED Strategic Action Plan**
 - Multi-Tier System of Supports
 - Data Teams
 - Mental Health
 - Culture and Communication
 - Professional Learning
 - Recruitment and Retention
3. Personal **Strength** to leverage (*if you did StrengthsFinder*)
 - SCRED Leadership and Coaching Data

PLC Focus Setting

1. As a PLC, in what areas do we believe our collective professional practice would benefit from additional growth (consider reviewing available data to drive your brainstorming)? ***Consider the themes you identified during the Professional Practice PLC Reflection.***
2. Based on our identified needs and desire to improve student learning, what would our group like to accomplish this year?
3. What [SCRED Strategic Action Plan](#) vision statements align with our PLC's desired professional focus?
4. Based on the professional learning needs of our PLC, what focus statement would summarize our collaborative work for the year?



**Create space for employees to
reflect on progress**



**Challenge employees to
determine next steps**

Strategic Action Plan Activity Instructions

Set Up (5-10 minutes)

1. Break into groups listed on agenda via google meet link
2. Designate Note Taker and document on agenda
 - a. Other roles: Facilitator, Time Keeper, Focus Monitor
3. Note taker pulls up google [form](#)

Strategic Action Plan Activity Instructions

Reflection (20-25 minutes)

4. Determine what progress was made this school year on 2015-20 strategic plan.
 - a. Enter no more than three reflective statements per vision statement
 - b. Helpful documents for reference: [SCRED Annual Report 2018-19](#)

Strategic Action Plan Activity Instructions

Planning (20-25 minutes)

5. Determine next steps toward the 2020-25 strategic action plan.
 - a. Enter no more than three future planning statements per vision statement

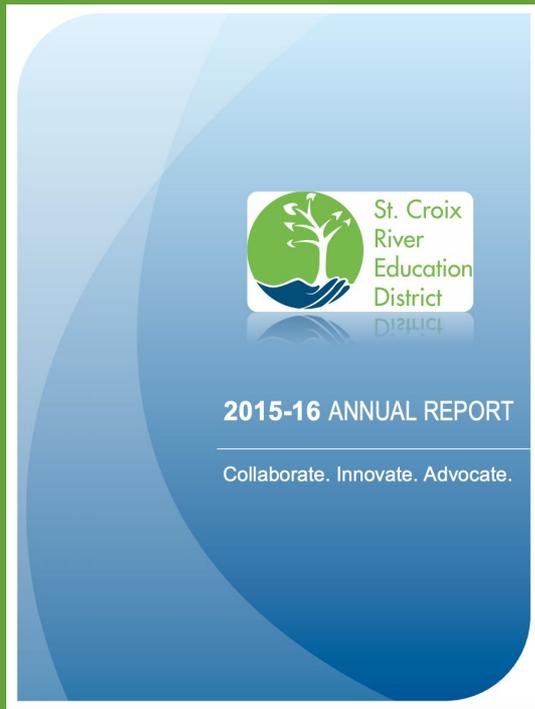
Note Taker to hit SUBMIT!



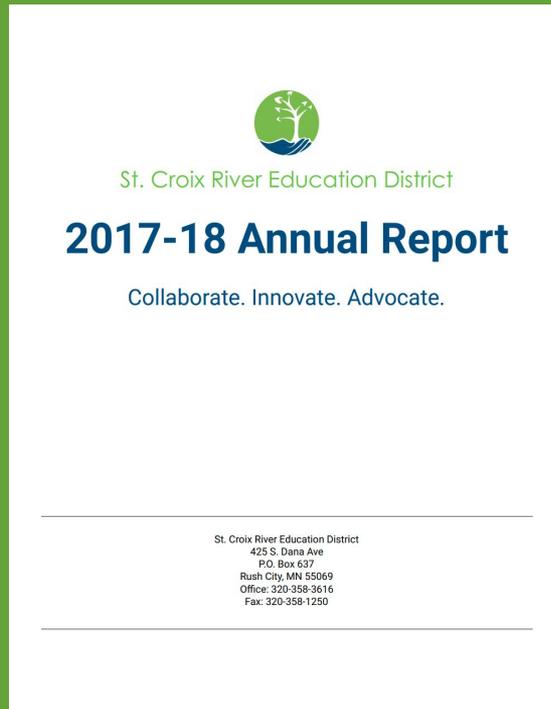
**Be explicit about connections
with stakeholders**

Annual Report

Version 1



Version 2



Version 3



Our Vision in Action

OPEN 2020-25 STRATEGIC ACTION PLAN



Continue to build a positive, collaborative culture with our member districts through meaningful work and intentional communication

Why? To enhance the effectiveness of the services we provide to our stakeholders



Support the implementation of collaborative data-based decision making

Why? To maximize academic and social emotional learning outcomes for all students



Develop capacity within our member districts to implement an effective Multi-Tiered System of Supports (MTSS), including the use of evidence-based academic and social emotional learning instructional practices

Why? To maximize outcomes while creating safe and supportive schools for all



Provide high-quality professional learning informed by our stakeholder needs and reinforced through opportunities for supported application

Why? To cultivate professional growth and equip educators to meet the needs of all students

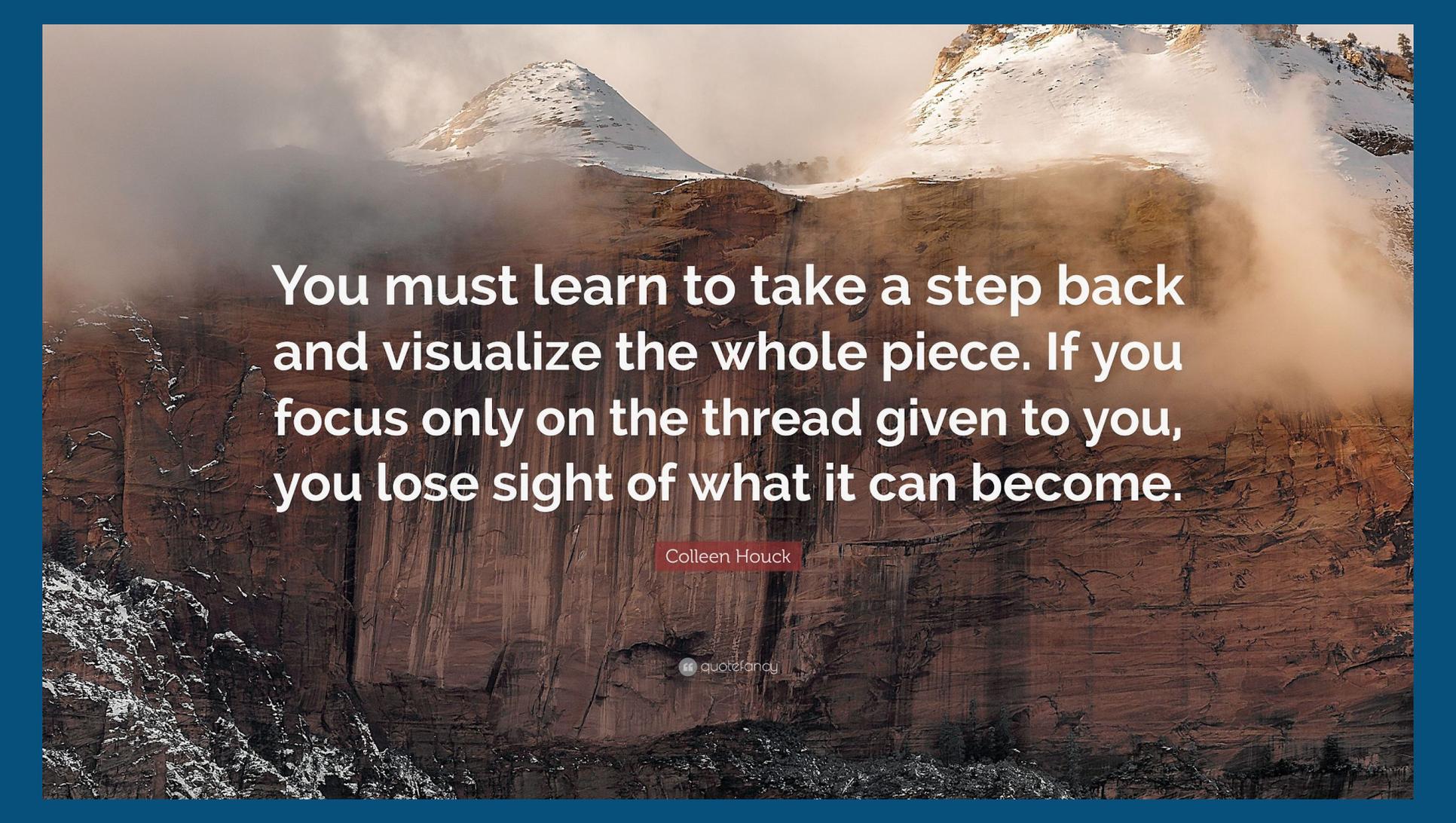


Enhance recruitment and development opportunities for SCRED employees and support similar efforts in member districts

Why? To promote continuity in the services provided to our member districts, students, and families

APPLICATION

Turning Learning Into Action

A dramatic landscape featuring a large, layered rock formation with snow-capped peaks under a hazy sky. The rock face is dark and textured, with horizontal layers. Snow is piled up on the peaks and in the foreground. The sky is a mix of white and light brown, suggesting a hazy or overcast day. The overall mood is majestic and somewhat somber.

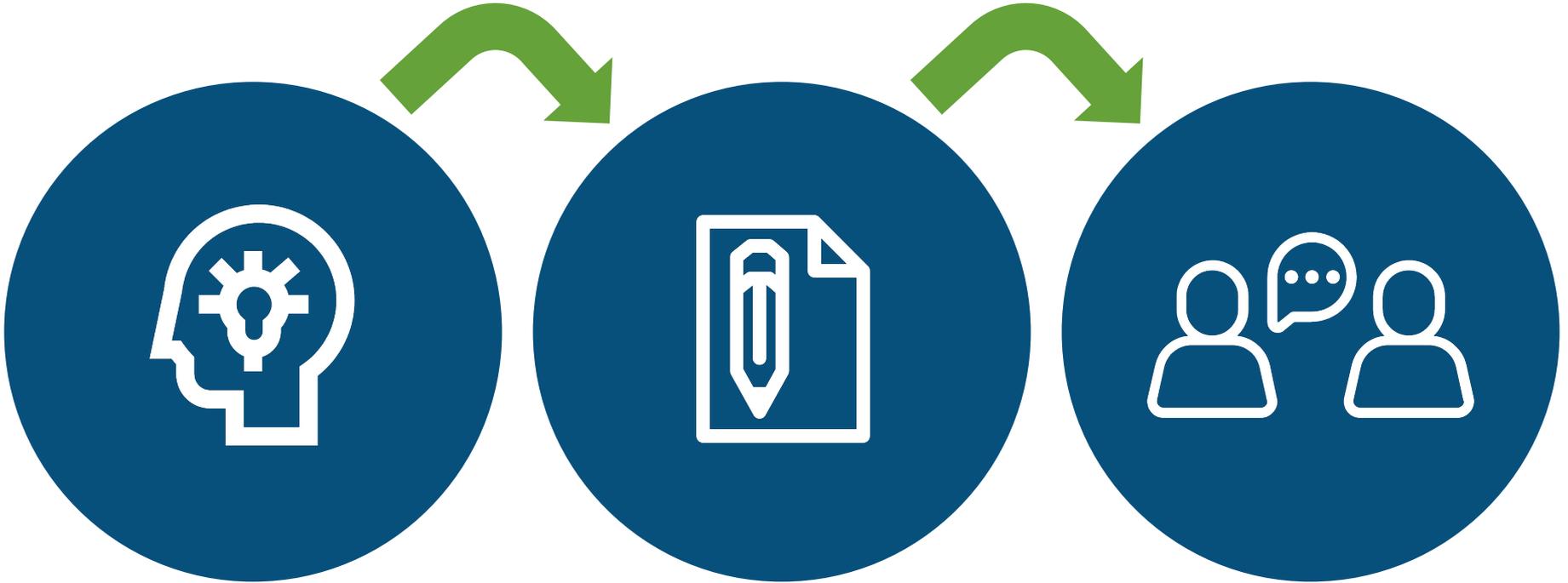
**You must learn to take a step back
and visualize the whole piece. If you
focus only on the thread given to you,
you lose sight of what it can become.**

Colleen Houck

quote fancy



What are some actions you want to take toward developing or living out your strategic plan to move your system forward?



“

**Unless you try to do something
beyond what you have already
mastered, you will never grow.**

Ralph Waldo Emerson

”