



CSI Reboot

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Time Frame 840

Essential Question(s)

- What has worked/not worked?
- What has changed in the environment?
- What needs to be removed from the plan?
- What needs to be added to the plan?

Summary

Districts review their previous Strategic Action Plans. They work to adjust their plan for updated student achievement data. Leaders determine action steps to keep, delete, or add for the next 3 years.

Learning Goals

- Review original strategic plan
- Analyze current data
- Review/revise student achievement Goal Area
- Model process to review/revise other Goal Areas
- Review/revise accountability plan

Attachments

- [ABC GraffitiPOSTER.pdf](#)
- [CSI Community Survey 3-2-1 .docx](#)
- [CSI Reboot Slide Show.pptx](#)
- [Stakeholder Elevator Speech Card.pptx](#)
- [Strategic Planning SWOT.docx](#)

Materials

- CSI Reboot Slide Show (attached)
- Strategic Planning SWOT handout (attached, 3 or 4 per group)
- Scorecard for each Goal Area (digital, participants should already have)
- ABC Graffiti handout (1 per group)
- ABC Graffiti Posters (1 per group)
- [Goal Area and Objective Revision Instructions handout](#) (digital, forced-copy)
- [Student Achievement Initiative Instructional handout](#) (digital, forced-copy)
- Stakeholder Elevator Speech Cards (attached, 1 half-sheet per participant, printed on card stock)
- CSI Community Survey 3-2-1 handout (attached, 1 per participant)
- Large poster paper (two for each Goal Area)
- Sticky notes (3 different colors, recommend red, green, yellow)
- Markers
- **Districts Community Survey Results** (collect by survey prior to Professional Development)
- District Student Achievement Data (collect prior to Professional Development)

Engage - Day 1

Prior to the Session

Keep in mind that each district is different. Not all districts will need every step in the presentation. Prior to the professional development session, reach out and discuss the district's needs as part of the planning process. Also, ask the district to pre-group their participants in all Goal Areas, except student achievement. You will need to request updated student achievement data (OSTP, Benchmark, ACT, AP, OCCR) and give out the CSI Community Survey prior to presenting the professional development. Have the district update any documents to reflect their current plan.

Obtain scorecards from the district and go in and add lines for the new PMs (performance measures). You will need a list of who is invited to participate, their role(s), and whether they have been involved in the process.

At least two weeks before each new professional development, you will need to send the digital scorecards for that school to the Writing team for a quick copyediting pass.

Preparing for the Presentation

Preparing the Slide Show: Insert the District's information in the slides indicated below, which are highlighted in yellow on the slides. Notes are added throughout the narrative as a guide.

- Customize **slide 1** with the name of the district.
- Customize **slide 7** with each district's State of the District Information and the Superintendent's photo.
- Customize **slides 13, 14, 29** and **30** for each district to show their CSI Community Survey results.
- Customize **slide 39** for each district to show their Accountability Flowchart.
- Customize **slide 45** to share your evaluation link.

Display **slide 1 and 2** and welcome participants. Briefly introduce yourself and the professional development session.

Move to **slide 3** and inform participants they will choose if they want an SUV or a BMW. Based on their choice, they will answer the three questions that match. Depending on the size of the group, this can be done as a whole group or in small groups. Start the 5-minute timer on the slide to give participants a time limit on their conversation.

Move to **slide 4** to go over the learning objectives.

Display **slide 5** and explain how the objectives are broken down over the next two days.

Move to **slide 6** and share the essential questions. As participants look over this slide, encourage them to think about the following questions:

- Have Learner Expectations, Core Beliefs, and Core Values changed?
- Have finances changed drastically?
- Has your organization taken on new responsibilities that affect your goals?
- Have there been any economic or external factors that could affect your goals?

Move to **slide 7** and give the participants the opportunity to read the State of the District.

Move to **slide 8** and go over the 4-Phase Model. Remind participants of the process they did several years ago and introduce the process to any new members of the team.

Move to **slide 9** and introduce the participants to SWOT. Tell the participants they will be using the strategy SWOT to analyze their district's previous continuous strategic plan and to gain a better understanding of the plan. Explain that SWOT helps you understand the strengths and weaknesses of your strategic plan, while also identifying opportunities and threats to your plan. Inform them that strengths and weaknesses are things they have control over, but opportunities and threats are external factors usually out of their control but still important to consider when planning.

Pass out the **Strategic Planning SWOT** handout and go over the examples in each quadrant. Have participants move into their predetermined Goal Area teams. There should be one group for each Goal Area of their plan. Each group will need to assign a leader and a scribe. Explain to the participants that they will be looking for areas of strengths, weaknesses, opportunities, and threats for their assigned Goal Area. Advise the groups to process each quadrant separately. They should spend about 3 minutes on each quadrant. Inform participants when they should move to the next quadrant.

SWOT

If any group is struggling with their SWOT, encourage them to think of strengths as celebrations and weaknesses as things to be avoided on the next plan but used to capitalize on opportunities.

Once all teams are done, move to **slide 10** and introduce the [Carousel](#) strategy. Have each group hang their SWOT handouts around the room or, if space is not available, have them leave it on their table. Explain that each group will take time to view the other Goal Areas' SWOT handout. Encourage participants to focus on strengths and weaknesses. After 3 minutes, have each group rotate to the next Goal Area SWOT handout. Continue every 3 minutes until each group has viewed all the Goal Areas. As a group, take time to discuss what they discovered about their continuous strategic plan.

Use **slide 11** to provide time for a break. You may move break or lunch slides as needed to fit the time allowed.

Explore

Move to **slide 12** and, as a group, go over the performance of culture and how it applies to their district. Emphasize why this is important for them as a district. Ask participants for feedback on their thoughts about the Performance Culture and how it might apply to what they are doing over the next two days.

Move to **slide 13** and share their CSI Community Survey results. Introduce participants to the [3-2-1](#) strategy and pass out the **CSI Community Survey 3-2-1** handout. Give each group/participant time to analyze the information on the slide and complete the handout.

Once all participants have completed their 3-2-1, discuss what the participants wrote as a group (starting with 3 and ending with 1). Encourage participants to look for answers to some of their questions throughout the next two days.

Explain

Move to **slide 14**. Have each group pull up their Student Achievement Digital Scorecard from their first CSI professional development. Refer to the first page of the scorecard. Tell the participants they will start with looking at the big picture of the strategic plan. Ask the participants to consider the questions:

- Are our goals/objectives still relevant?
- Do they reflect your community's Learner Expectations, Core Beliefs and Core Values?

They will be using these questions to help them examine and rework their Student Achievement Data Goals and Objectives.

Move to **slide 15** and inform participants they will first be going through their digital scorecard focusing on student achievement. They will look to see if they have met their previous targets and benchmarks for Student Achievement and set a new target and benchmarks. Have participants work in groups with one person being the leader and one person being the scribe. Each group will need to make their own copy of **Student Achievement Digital Scorecard** in order to edit. As the groups go through the performance measures, they will record whether they met their benchmarks and what their new benchmarks are going to be for the next 3 years. Give the groups time to go through the digital scorecard and look at the performance measures.

After each group has finished, come back together and display **slide 16**. Choose the digital scorecard or performance measure you would like to start with. Then, introduce the [Agreement Circle](#) strategy to the participants. Have the participants form a large circle. Read the red changes from the Student Achievement scorecards. Give participants 5-10 seconds to decide if they agree or disagree. If participants agree they move to the inside of the circle. If they disagree they stay on the outside. Give each group a few minutes to defend their opinion. Use the timer on the slide to help participants from taking too long. Then, ask participants to make a final decision. If the majority of the group is in agreement, the revision stays. If the majority of the group disagrees, the revision is removed or struck through. This can also be done with thumbs up or thumbs down if you do not have the space for a large circle. Continue this until all performance measures have been discussed.

Presenter's Note: Agreement Circle

You will need to combine the performance measures from all the digital scorecards to prevent the Agreement Circle from taking too long.

Timing

Slide 17 and **slide 18** can be moved or adjusted as needed. The team building activity on **slide 18** can be skipped if needed.

Slide 17 - Lunch Break

When participants have returned from lunch, display **slide 18**. Ask the participants to find a picture on their device that best represents them. This could be from their personal photos or one found in a Google search. Give participants time to share at their tables. Have them explain the picture and what it says about them.

Move to **slide 19** and provide the participants with the link to the [Student Achievement Initiative Instructional](http://k20.ou.edu/stu) handout (<http://k20.ou.edu/stu>). This will prompt the participants to create their own copy of the document. Once each participant has the handout pulled up, inform them that they will now go over their action steps and analyze how they apply to their new benchmarks. Go over the instructions step-by-step.

- Strike through initiatives that are determined to be irrelevant.
- If an initiative is kept, look at the action steps and strike through steps that need to be deleted.
- Insert a new row to rewrite a revised action step and insert/add rows to insert new action steps.
- All new data and revisions should be done in red font.

Have participants pull up their Student Achievement Digital Scorecard that they worked on earlier. Advise participants to not scrap all their previous work, but to build on it. Provide participants time to go through their action steps.

Use **slide 20** to provide time for a break.

Extend

Presenter's Choice

Move to **slide 21 or 22** (this is the facilitator's choice depending on time) and choose between the two consensus instructional strategies. If using [8 Up](#), display **slide 21**. For [Agreement Circle](#), unhide **slide 22**. If you are short on time, it is recommended that you use the Agreement Circle strategy instead of 8 Up.

8 Up

Display **slide 21** and introduce the [8 Up](#) strategy to the participants. Inform the participants they will work in small groups to come to a consensus on their Student Achievement Digital Scorecard revisions. Then each group will join with another group and work together to come to a consensus on the Student Achievement Digital Scorecard revisions. As a whole group, work together to come to a consensus between the two groups for a final revision. Choose the groups you would like to combine and inform them they have 5 minutes to review what each group wrote and come to a consensus. Start the timer on the slide and walk around to assist as groups work. When the timer goes off, take the groups you have and combine them again (two groups becoming one). Again, inform the participants that in their new group, they will work to come to a consensus from the two Student Achievement Digital Scorecards from their groups. They will have 5 minutes (use the timer on the slide). Continue this way until you only have two groups left in the room. Then you facilitate the two groups combining their scorecards into one unified goal.

Agreement Circles

Unhide and display **slide 22**. Choose the digital scorecard or action step you would like to start with. Then remind the participants about the [Agreement Circle](#) strategy. Have participants form a large circle and read the red changes from the Student Achievement Scorecards. Give participants 5-10 seconds to decide if they agree or disagree. If participants agree, they move to the inside of the circle. If they disagree, they stay on the outside. Give each group a few minutes to defend their opinion. Use the timer on the slide to help participants from taking too long. Then, ask participants to make a final decision. If the majority of the group is in agreement, the revision stays. If the majority of the group disagrees, the revision is removed or struck through. This can also be done with thumbs up or thumbs down if you do not have the space for a large circle. Continue this until all action steps have been discussed.

Evaluate

Move to **slide 23** and introduce participants to [ABC Graffiti](#) strategy. Tell each table they will discuss and write down what they have learned about the process today and their data. Have each table choose a scribe and pass out the **ABC Graffiti Handout**. Instruct the scribe to write down ideas according to the letter that matches the thought. The participants will then participate in the [Round Robin](#) strategy so everyone can contribute and share answers to the question, “What have you learned about the process and your data today?” Inform participants that they will go around the table, each taking a turn sharing a new thought. If they can’t think of something to add, they are welcome to say “pass” on that round. They will continue to go around the table until time is up.

Presenter's Note

Walk around the room and participate in the discussions. This will give you a feel for how the participants are feeling and what needs to be done for tomorrow.

If you run out of time, you can continue Day 1 in the morning at the start of Day 2.

Explore

Move to **slide 29**. Remind participants of the questions from yesterday. Ask them to think of the other Goal Areas and objectives they have as a district while reflecting on these questions. Provide participants time to think through the questions:

- Are our goals/objectives still relevant?
- Do they reflect our community's Learner Expectations, Core Beliefs, and Core Values?

Display **slide 30** and introduce the participants to the [Four Corners](#) strategy. Tell participants they will be participating in a modified version of this strategy. They will have a "corner" for each of their Goal Areas except Student Achievement. Inform the participants that they will look over their digital scorecards for the other areas and will make notes of things that are still relevant, not relevant, and notes about what they might add for future objectives. Inform the participants that each note will be assigned a specific color and that this information will be used by a group to help with the revision process. This is the participants' opportunity to share their thoughts and give input in all the Goal Areas.

- Green sticky notes — action steps that are still relevant
- Red sticky notes — action steps that are NO longer relevant
- Yellow sticky notes — NEW actions steps or objectives that need to be added

Have participants pull up the digital scorecards for all their Goal Areas except Student Achievement. Remind participants that they are not editing the scorecards but using the sticky notes to share their thoughts. Give participants time to write sticky notes for each of the Goal Areas and to place their sticky notes on the appropriate poster.

Presenter's Note

These posters will be used in the next activity where participants are updating their digital scorecards. Color code the sticky notes to help each group understand their colleagues' input. For example:

- green sticky notes are for objectives that are still relevant
- red sticky notes are for items to be removed
- yellow sticky notes are for new objectives

Update **Slide 30** to reflect the color of sticky notes you have available.

Use **slide 31** to provide time for a break.

Explain

Move to **slide 32**. Divide the group into a team for each Goal Area in their strategic plan, except for Student Achievement. These groups should be assigned by the district. Go over the process of analyzing their other goals and using the digital scorecard. Encourage the participants to use the Four Corners posters from the previous activity to include the thoughts and ideas of their colleagues.

Display **slide 33** and have participants start with examining their data for each of the performance measures. Each group should do this for their Goal Area only.

Once participants have finished working on the performance measures, display **slide 34** and have the participants access the [Goal Area and Objective Revision handout](#) by using the link on the slide. Inform participants that they will now work on the action steps for their performance measures. Again, remind participants to not scrap what they have previously created but to build upon it. Give the participants the following instructions:

- Strike through initiatives determined to be irrelevant.
- If initiative is kept, look at action steps and strike through steps that need to be deleted.
- Insert a new row to rewrite a revised action step.
- Insert/add row to insert new action steps.
- All new data and revisions should be done in red font.

Give participants the time needed to complete this work.

Slide 35: Lunch Break (this may need to be done during the current activity and then participants resume work once they return)

Once all participants have finished revising the scorecards, move to **slide 36** and introduce the [Gallery Walk](#) strategy to the group. This strategy will be done digitally. The participants will take time to go look at the other Goal Area digital scorecards to see the changes/updates made by their colleagues. Give participants 5-8 minutes to complete this activity.

Extend

Move to **slide 37**, ask the participants to think about the structures they have in place to discuss the accountability for their strategic plan (Do they hold quarterly meetings or principal meetings?, etc.) At each table, have the groups participate in [Round Robin](#) to discuss the questions:

- What meeting do you hold at the district level to discuss your strategic plan?
- Who attends the meetings?
- How often do you meet?

After each group has finished their discussion (2-5 minutes), display **slide 38** and as a group discuss the processes and structures as well as any changes that might need to be made.

Move to **slide 39** to show the participants their Accountability Flowchart. Guide them in a discussion about their accountability flowchart and how it worked over the last 5 years. Potential questions include:

- Is this what your accountability plan actually looked like?
- If not, what was the process you followed?
- What worked well?
- What did not work well?

Move to **slide 40** and have participants complete a [Round Robin](#). At each table, have the participants take turns answering one question at a time. Go around the whole table until each participant has had an opportunity to share. Then move to the next question until all participants have had the opportunity to answer all the questions.

Once each table has completed the activity, come back together as a whole group. Discuss what worked well and what they may need to adjust for the future.

Move to **slide 41** and, as a group, discuss the processes and structures of their Accountability Flowchart as well as any changes that might need to be made.

Use **slide 42** to provide time for a break.

Evaluate

Move to **slide 43** and reintroduce the [ABC Graffiti](#) strategy. Have the participants use the ABC Graffiti strategy to answer the question: “How do you intend to reintroduce your Focus Forward Plan and involve others?” Each group will write down as many ideas as they can until time runs out. Once the timer goes off, have each group rotate to another group's poster. Continue until each group has rotated once to all the other posters.

Move to **slide 44** and introduce participants to the [Elevator Speech](#) strategy. Instruct participants to write down a 30-second speech explaining their revised strategic plan to stakeholders. Pass out the **Stakeholders Elevator Speech** handout. Give participants time to fill in their thoughts. Have participants take the time to share their Elevator Speech with other participants at their table.

Move to **slide 45** and share your evaluation link with the participants.

Research Rationale

Student achievement has been linked to schools with higher levels of instructional leadership (Stosich, E. L. 2020). Development of a plan which considers stakeholder data is critical to its fidelity and sustainability. It is imperative that educators engage stakeholders in reflective dialogue about the purpose and process of education in a local context. Evaluating data and making decisions regarding policy should be a whole school initiative (Schildkamp & Poortman, 2015; Visscher, 2021). Data reviewers should consider multiple data points to develop a picture of current standings in order to make decisions moving forward (Hamilton, et al., 2009; Schildkamp, 2019; Visscher, 2021). Furthermore, ongoing inquiry should be common practice for continued growth (Mandinach et al., 2019). School leaders need to focus on continuously enhancing student learning outcomes (Hargreaves & Dennis, 2020). The ultimate goal is universal ownership and support for district and school improvement.

Resources

- Hamilton, L., Halverson, R., Jackson, S. S., Mandinach, E., Supovitz, J. A., & Wayman, J. C. (2009). Using Student Achievement Data to Support Instructional Decision Making. IES Practice Guide. NCEE 2009-4067. National Center for Education Evaluation and Regional Assistance.
- Hargreaves, A., & Dennis, S. (2020). Leading from the middle: Its nature, origins and importance. [Leading from the middle] *Journal of Professional Capital and Community*, 5(1), 92-114. doi:<https://doi.org/10.1108/JPC-06-2019-0013>
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