

Vision Retreat Participant Handout

Vision Retreat Purpose

The Vision Retreat provides an opportunity for the strategic plan team to develop a shared understanding of the current mission, vision, core values and strategic themes and build upon those ideas to move the district forward in answering the question, *“Where do we want to be five years from now that is different than where we are today?”*

The Vision Retreat offers an opportunity for the plan tem to review the components of a continuous improvement framework based on research best practices and benchmark where the district is in relationship to those practices.

The outcome of the day is for the plan team to describe a clear vision for the future through a product known as a **Preferred Future Statement**.

Common Vocabulary

Core Values	The district’s beliefs and principles that articulate the culture of the organization. These are the standards that describe how employees and the organization are expected to behave internally and externally. They serve as the basis for decision-making and influence actions in everyday situations.
Mission	The district’s purpose described in the language of the business, including who is served and what products, programs and serves are provided to customers and stakeholders.
Strategic Theme	Three of four strategic focus areas that build on the customer value proposition to define the organization’s high-level business strategy; breaks down the vision and mission into action and focuses energy on desired strategic results.
Vision	A vivid, emotionally inspiring, time-specific picture of a future to which the organization aspires. A description of how the district will look, sound and feel differently that it is today.
Vision Result	An achievable stretch target identified in order to measure the success of an organization’s vision statement. Sometimes this is referred to an a Preferred Future Statement

Strategic Foundation or Preferred Future

When we complete our work today, we will have the concepts to produce a Strategic Foundation or Preferred Future Statement. We will share this product with those we represent and seek their feedback between the Vision Retreat and the Setting Direction Retreat.

Competitive Advantage—The DNA <i>What we do best</i>	Vision Statement- Our Future <i>Where we are headed</i>
Mission Statement- Our Core Purpose <i>Why we Exist</i>	Vision Description <i>What it will look like</i>
Core Values - How we act and behave <i>What we stand for?</i>	

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ACTIVITY ONE: Feedback Review of Data Retreat SWOT from Stakeholders

Identify the top ten strengths, top ten weaknesses, top ten opportunities and top ten threats by examining the SWOT analysis from the Data Retreat and any feedback from stakeholders.

DATA RETREAT FINAL SUMMARY SWOT ANALYSIS: This data and information will lead to the prioritization of the critical issues the district will focus its attention on in the next 5 years.	
<p>STRENGTHS: What do we consider to be our strengths? What advantages do we have? What do others say our strengths are?</p>	<p>Changes to STRENGTHS: What do we consider to be our strengths? What advantages do we have? What do others say our strengths are?</p>
<ul style="list-style-type: none"> ● Whole child centered; numerous co-curricular and extra-curricular activities with a solid fine arts program. ● Preparing students for LT; LT placement and success of students after one year of high school ● Student attendance is high; students like coming to school ● Data shows consistent overall student achievement growth at all levels in reading and math; Consistently outperforming benchmark districts ● Special Education programs and services; English Language Learners programs and services ● 78% staff with master's or higher degrees ● High quality staff with great retention ● Financial Profile score, history of financial stewardship ● Technology 1:1 in grades 3-8 ● Families and students feel safe; high student and family satisfaction 	
<p>WEAKNESSES: What do we consider to be our weaknesses? What are we most criticized for or receive the most complaints about? What do we seem to have a hard time doing well?</p>	<p>Changes to WEAKNESSES: What do we consider to be our weaknesses? What are we most criticized for or receive the most complaints about? What do we seem to have a hard time doing well?</p>
<ul style="list-style-type: none"> ● Students being college, career, and life ready- MAP to PARCC ● Student achievement gaps among subgroup populations ● Lower Teacher morale due to too many initiatives producing stress and anxiety ● More consistent expectations and instructional strategies across the district ● Using data well to drive instruction ● Differentiation- meeting the needs of all students through interventions and enrichments (MTSS); Tier 2 and Tier 3 interventions that positively impact student achievement 	

<ul style="list-style-type: none"> ● Distribution of student enrollment; student enrollment slightly on the decline ● Deficit spending last two years ● Increasing social and emotional student needs ● Staff diversity to mirror student diversity 	
<p>OPPORTUNITIES: What opportunities for improvement do we know about, but have not addressed? Where could we change a weakness into a strength?</p>	<p>Changes to OPPORTUNITIES: What opportunities for improvement do we know about, but have not addressed? Where could we change a weakness into a strength?</p>
<ul style="list-style-type: none"> ● <u>Long term debt strategies; proactively ensure adequate resources to maintain critical programs and services to maintain the 105 Difference</u> ● <u>Explore better measures for student growth and achievement</u> ● Reimagining the structure of committees and improvement processes ● <u>Cultural awareness and teaching with poverty in mind</u> ● Parent communications and expectations- connecting families across the district ● Marketing our district ● Technology integration strategies to increase student engagement and inquiry ● Improve writing across the grade levels ● Prepare students for career and life readiness ● Focus on science and social studies content areas 	
<p>Threats: Who or what threatens us the most? What challenges are coming that we must respond to? What might block our progress?</p>	<p>Changes to Threats: Who or what threatens us the most? What challenges are coming that we must respond to? What might block our progress?</p>
<ul style="list-style-type: none"> ● State funding; shifting pension costs and Evidenced Based Funding ● National and state politics ● Increasing students of poverty and homelessness ● Possible voter-led referendum to further cap district revenues ● Distribution of student enrollment; continued impact of Hodgkins 	

ACTIVITY TWO: Identify the characteristic of a great Preferred Future Statement. Understand what we mean by reimagining our future.

Explore the key questions to reimagine the future of the District. Identify the characteristics of a great Preferred Future Statement. What does a great Preferred Future Statement look like? Consider why a Preferred Future Statement is critical to the development of a strategic plan. Identify the characteristics of a great Preferred Future Statement. Understand what we mean by reimagining our future.

Characteristics of a Great Preferred Future Statement

- Future Focused. Provides the “big picture” and clearly describes what your organization will be like in several years.
- Directional. Serves as guide to organizational plans and strategies.
- Specific. Clear and focused enough to shape decision-making.
- Relevant and Purpose-Driven. Reflects the company’s response to the challenges of the day.
- Values-Based. Implies the set of values that are required to support the organization.
- Challenging. Inspires members of the organization to do great things and achieve a higher level of standards.
- Unique and Memorable. Highlights what makes the organization different and why it matters.
- Inspiring. Appealing and engages people to commit to a cause.

Examples of a Great Preferred Future Statement

Wellesley Public Schools-

<https://wellesleyps.org/district-information/strategic-plan/>

Northbrook District 28

https://northbrook28.net/UserFiles/Servers/Server_556025/File/About/Navigate%2028/strategic%20plan%20final.pdf

Crystal Lake District 47

<https://docs.google.com/viewerng/viewer?url=https://www.d47.org//cms/lib/IL01904560/Centricity/Domain/1935/District+47+Strategic+Plan.pdf>

Peel School District

<http://www.peelschools.org/aboutus/mvv/Pages/default.aspx>

<https://www.youtube.com/watch?v=6CU5D9WPP-E>

Extended Vision completed after the draft of the Preferred Future Statement

<http://www.peelschools.org/aboutus/21stcentury/byod/Documents/Empowering%20Modern%20Learners%20Vision.pdf>

Why is a Preferred Future Statement critical to the development of a strategic plan?

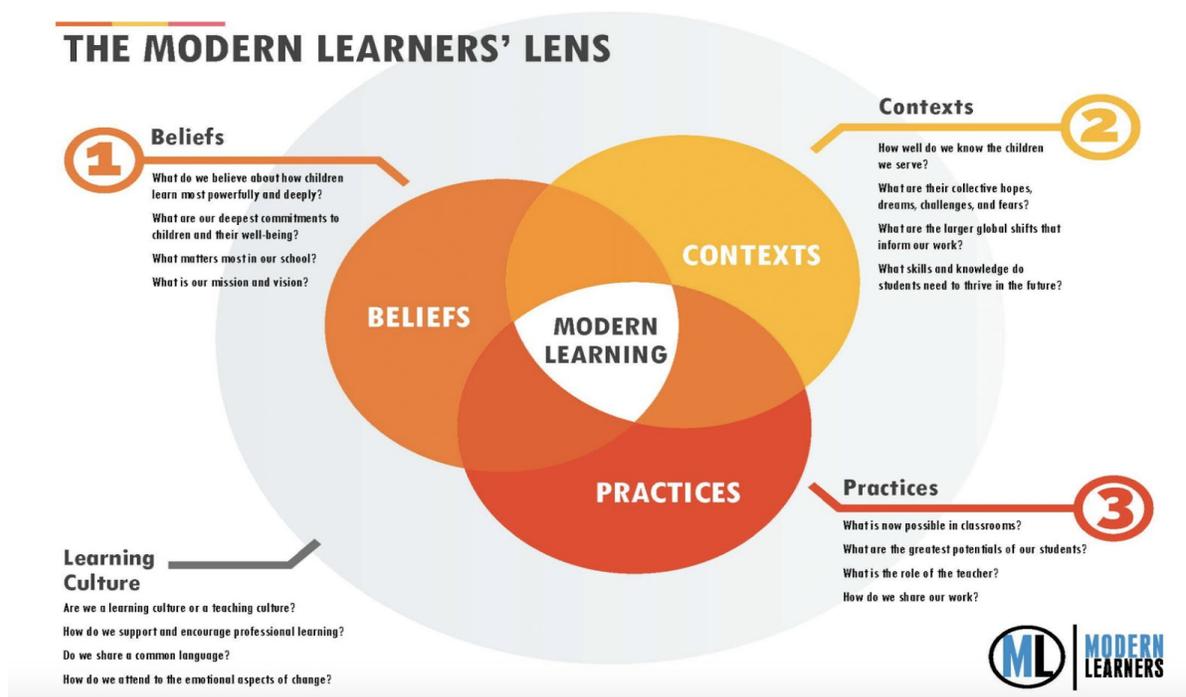
Share mission, vision, and values:

- (1) Communicate the purpose of the organization to stakeholders,
- (2) Reimagine what we hope, dream, and aspire to be,
- (3) Informs culture, climate, and relationship expectations,
- (4) Shape a mindset that guides behaviors and actions
- (5) Inform strategy development, and
- (6) Develop the measurable goals by which to gauge the success of the organization's strategy.

ACTIVITY THREE: Begin with the end in mind.

Understand the elements of a Vision for Improvement that identifies a reimagined school system

- Beliefs
- Context
- Practices
- Learning Culture



Lens/ Key Questions	Notes
Beliefs	

Contexts	
Practices	
Culture of Learning	

ACTIVITY FOUR: Share findings from the Homework Investigations Explore

Learn about key thinking from the two homework articles:

- 9 Elephants in the Classroom That Should Unsettle Us
- Ten Principles of Modern Learning

Reading Assignment:	
Articles	Ideas WE THINK might be great to consider as we reimagine District 105
10 Principles of Learning	

9 Elephants in the Classroom That Should Unsettle Us

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Learn about the electronic homework investigations to see how others are reimagining their future.

Name of your site:

Elements	Site Investigations
<p>BELIEFS</p> <ul style="list-style-type: none"> • How were students learning most powerfully and deeply? What was their role in the learning process • What were adult commitments to students and their well-being? • What were top priorities? • What were mission, vision and values? 	
<p>CONTEXTS</p> <ul style="list-style-type: none"> • What were the large, global skills aimed at college, career, or life readiness? • What skills, knowledge, and competencies guided students learning for the future? • How well did adults understand each student’s learning needs? 	
<p>PRACTICES</p> <ul style="list-style-type: none"> • What was the role of a student? 	

<ul style="list-style-type: none"> • What was the role of the teacher? • How did learning extend beyond the classroom walls? • What did engagement look like? 	
<p>CULTURE</p> <ul style="list-style-type: none"> • How was adult learning supported? • How was student learning supported? • Was they common language, expectations • How did they address the emotional aspects of change? 	

ACTIVITY FIVE: Apply what we have learned to begin a draft to reimagine District 105’s future.

Divide into four work groups. Consider the key questions. Reach consensus on responses to the key questions. Share work with the other three groups. Provide input on all four of the elements.

Group One: Brainstorm ideas to the Belief questions.
 Use your own ideas and ideas from the investigations and articles from today’s work. Be ready to share your product with the other teams.

1

Beliefs

What do we believe about how children learn most powerfully and deeply?

What are our deepest commitments to children and their well-being?

What matters most in our school?

What is our mission and vision?

Group Two: Brainstorm ideas to the Contexts questions.

Use your own ideas and ideas from the investigations and articles from today's work. Be ready to share your product with the other teams.

Contexts

2

How well do we know the children we serve?

What are their collective hopes, dreams, challenges, and fears?

What are the larger global shifts that inform our work?

What skills and knowledge do students need to thrive in the future?

Group Three: Brainstorm ideas to the Practices questions.

Use your own ideas and ideas from the investigations and articles from today's work. Be ready to share your product with the other teams.

Practices



What is now possible in classrooms?

What are the greatest potentials of our students?

What is the role of the teacher?

How do we share our work?

Group Four: Brainstorm ideas to the Culture of Learning questions.

Use your own ideas and ideas from the investigations and articles from today's work. Be ready to share your product with the other teams.

**Learning
Culture**



Are we a learning culture or a teaching culture?

How do we support and encourage professional learning?

Do we share a common language?

How do we attend to the emotional aspects of change?

ACTIVITY SIX: Use the ideas from the previous activities to draft a new mission, vision, and core values statement for the district.

Toward a Strategic Foundation:

MISSION: The mission pillar asked the question, “WHY?” More specifically, it asks “Why do we Exist?” The intent of this question is to help reach agreement regarding the fundamental purpose of the organization. This clarity of purpose can help establish priorities and becomes an important factor to guide decisions.” Your mission statement is the best vehicle to get the word out about the “why” and the “wow” behind your district. In truth, your mission statement is no less important than your business plan. It needs to explain — eloquently, succinctly, and passionately — the core reasons for your existence. Your mission statement should inspire others to want to know more about your ideas, helping to position your district in the marketplace and to fuel growth. (DuFour, DuFour, Eaker, and Many, *Learning By Doing*, Second Edition: Solution-Tree, 2010)

A mission:

- Tells a story, in a few words that defines why the organization exists.
- Describes the core purpose of the organization that is persistent over time.
- Answers the following questions: Why does this organization serve and how are the served? What is the organizational purpose?
- Incorporates features of the organization that highlight its uniqueness and define its purpose.
- Helps define why the organization exists.
- Focuses on satisfying customer needs.
- Take the form of: “Our mission is to provide (what) to (whom) in order to (provide what benefit) while (maintaining what values).

Criteria for evaluating a mission statement:

- ✓ Is it clear and understandable?
- ✓ Is it brief enough for most people to remember and say in one breath?
- ✓ Does it clearly specify the school’s fundamental purpose?
- ✓ Does it have a primary focus on a single strategic thrust (such as learning)?
- ✓ Does it reflect the distinctive competence and culture of this school?
- ✓ Is it broad enough to allow flexibility in implementation, but not so broad as to create lack of focus?
- ✓ Will it help school personnel, parents, and community members make decisions?
- ✓ Is it energizing and compelling? Does it motivate and inspire employee commitment?
- ✓ Does it say what you want your district to be remembered for?

VISION: The vision pillar asks “What?”—that is, “What must we become in order to accomplish our fundamental purpose?” In pursuing this question, the district attempts to create a compelling, attractive, realistic future that describes what they hope their district will become. Vision provides a sense of direction and a basis for assessing both the currently reality of the district and potential strategies, programs, and procedures to improve upon that reality. There is no more powerful engine driving an organization toward excellence and long-range success than an attractive, worthwhile and achievable vision of the future that is widely shared. (DuFour, DuFour, Eaker, and Many, ***Learning By Doing***, Second Edition: Solution-Tree, 2010)

A vision:

- Describes where the organization wants to be, typically three to five year in the future. Focuses on the district’s “North Star.”
- Vividly captures the organization’s “picture of the future”.
- Is brief and easy to understand and communicates a message that is emotionally inspiring, to create a passion to contribute to the organization’s future success.
- It is audacious and takes you way beyond where you are to the “mountain top.”
- It builds on core competencies. It give employees a larger sense of purpose so they see themselves as building a cathedral instead of laying stomes.
- The vision takes the form of “Our vision is to become (achieve, improve, etc.) by (date).”

Criteria for evaluating a vision statement:

- ✓ Does it manifest our mission?
- ✓ Is it concise and compelling?
- ✓ Is it inspirational?
- ✓ Does it communicate promise?
- ✓ Does it create an image of something that cannot be seen today, but is possible tomorrow?
- ✓ Does it focus on ends not means?
- ✓ Does it manifest the mission and values?

CORE VALUES: The third pillar of the foundation, the values pillar identifies our beliefs and then clarifies those beliefs through collective commitments. It asks, “How must we behave to create the district that will achieve our purpose?” In answering the question, educators shift from offering philosophical musings on mission or the shared hopes for the district of the future to making commitments to act in certain ways. Clarity guides the individual work of each member and outlines how each person can contribute to the improvement initiative. Policy manuals and directives are replaced by commitments and covenants. Clarifying collective commitments is one of the most important strategies in building a PLC. (adapted from DuFour, DuFour, Eaker, and Many, *Learning By Doing*, Second Edition: Solution-Tree, 2010)

Core Values:

- Describe what the organization stands for in the context of its mission and vision.
- Guiding principles, defining the code of conduct and behavior that is expected of all employees.
- Provide ethical guidelines for decision-making and daily conduct.
- Are aligned with organization vision, mission and culture.
- Should be described in vivid behavioral terms.
- Are represented in a phrase but not a sentence or paragraph.
- Should not include more than 5-7 so they can be memorable.
- Supports mission and vision.

Criteria for evaluating a value/ commitment statements:

- ✓ Does it manifest our mission and vision?

- ✓ Is it compelling and based on a belief we would not compromise?
- ✓ Is it a guiding principle that guides behaviors and actions?
- ✓ Is it clear and easy to understand?
- ✓ Does it create an unwavering and unchanging guide?
- ✓ Is it something we will hold each other responsible and accountable for our actions?
- ✓ Is it something we would want future staff members to support?
- ✓ Does it have a commitment to describe what we would do to move the belief to action?

Drafting the District's Mission, Vision and Core Values

Mission: Fundamental Purpose

- What is the fundamental purpose of this frame?
- How can this frame's purpose motivate and inspire membership commitment?
- Is the frame's mission statement energizing and compelling?
- Is the frame's mission statement concise and easy to remember?

Vision

- What do we see in our future that is different than we are today to live this frame?
- What description for this frame captures your hopes, aspirations, and dreams for the union's future?
- Does the vision statement for this frame focus direction and serve as the union's "North Star?"
- Does the vision statement for this frame focus on ends not means?

Beliefs/ Core Values

- What must we all believe to guide our actions and behaviors to live this frame?
- What values can we not compromise to live this frame?
- Do the frame's beliefs lead to commitments from all members?
- Can the values for this frame be used as norms to guide behaviors and serve as organizational norms?

Set the stage for the Setting Direction Retreat and celebrating our progress as a strategic plan team.

Date: December 7

Answer the question "How do we get from where we are to where we want to be?"

- *Consider feedback to revise our Preferred Future Statement from the Vision Retreat.*
- *Reflect on articles/homework to identify key words and phrases for setting organizational direction.*
- *Refine long-range SMART GOALS (Indicators and Measures) to set targets that will move the district to an even high level of performance.*
- *Develop a set of high leverage STRATEGIES that will guide the actions and behaviors of the district as it works toward achieving its Preferred Future.*
- *Preview the Final Meeting.*

Discuss role of team members in sharing the learning from the Visioning Retreat with constituent groups. Preview the agenda for Setting Direction Retreat.

Reflect on the Day.
Appreciations