

# 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

|                        |   |
|------------------------|---|
| <b>Core Values</b>     | 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. |
| <b>Mission</b>         | The district's purpose described in the language of the business, including who is served and what products, programs and services are provided to customers and stakeholders.  |
| <b>Strategic Theme</b> | 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.   |
| <b>Vision</b>          | 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 than it is today.  |
| <b>Vision Result</b>   | An achievable stretch target identified in order to measure the success of an organization's vision statement. Sometimes this is referred to as 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.

|   |  |
|---|--|
| <b>Mission Statement- Our Core Purpose</b><br><i>Why do we exist?</i>   | <b>Vision Statement- Our Future</b><br><i>Where we are headed?</i> |
| <b>Core Values - How we act and behave</b><br><i>What we stand for?</i> | <b>Vision Description</b><br><i>What it will look like?</i>        |

**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.

| <b>Pennoyer DRAFT SWOT ANALYSIS</b>   |   |
|---|---|
| <p><b>STRENGTHS:</b> What are we most proud of? What do we consider to be the results of our best work? What advantages do we have? What do others say about us in positive ways?</p> <ul style="list-style-type: none"> <li>• Student Diversity</li> <li>• Achievement results show growth and improvement over last few years</li> <li>• History of financial stability and state recognition</li> <li>• Student-centered focus throughout the district</li> <li>• Caring, dedicated, quality staff</li> <li>• High teacher retention rate</li> <li>• 1:1 student to device technology</li> <li>• Student to teacher ratio is wonderful</li> <li>• Competitive salary and benefits</li> <li>• Opportunities for professional development (training and support).</li> </ul>   | <p><b>WEAKNESSES:</b> 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"> <li>• Trust-Teacher to Teacher, Teacher to principal, Staff to board, Student to Teacher, Parent to Teacher</li> <li>• Student achievement below proficiency expectations</li> <li>• Readiness- Kindergarten, school to school, high school, college/ career/ life</li> <li>• Interventions- early learning, academic, behavioral, MTSS system, IEP students, low income students, Hispanic students</li> <li>• Differentiated instruction- Tier I, co-taught, push into classrooms, in class support to meet the needs of students academically and behaviorally</li> <li>• Student behaviors</li> <li>• Age of facilities- repair, renovations, custodial, maintenance, space, utilization</li> <li>• Innovation, openness to change, preparing students for their future</li> <li>• Parent engagement and satisfaction</li> <li>• State underperforming and low performing designations for schools.</li> </ul> |
| <p><b>OPPORTUNITIES:</b> What opportunities for improvement do we know about, but have not addressed? Where with a little work could we change a weakness into a strength? What are we not doing currently that might be the opportunity for us to improve.</p> <ul style="list-style-type: none"> <li>• Expiring contracts with transportation and custodial services</li> <li>• Student and staff responsibility and accountability expectations</li> <li>• Community and public perceptions of district</li> <li>• Collective inquiry, reflection, dialogue, and consensus tools and strategies</li> <li>• Early learning expansion of programs and services</li> <li>• High school readiness and success programs and services</li> <li>• Fidelity of implementation of expectations for curriculum, assessment, instruction, interventions and enrichments</li> <li>• Partnerships with community to expand learning beyond the day and year.</li> </ul> | <p><b>THREATS:</b> Who or what threatens us the most? What challenges are coming that we must respond to? What might block our progress? What do we have little control over that might impact our resources?</p> <ul style="list-style-type: none"> <li>• Student attendance and chronic truancy</li> <li>• Student mobility</li> <li>• Declining budget- Education Fund</li> <li>• State of IL financial crisis</li> <li>• Perception of district and community</li> <li>• Declining equalized assessed property valuation coupled with increasing tax rate.</li> </ul>   |

## Characteristics of a Preferred Future Statement

**Future Focused:** Provides the “Big Picture” and clearly describes what your district will be like in several years

**Direction:** Serves as a guide to district goals and strategies

**Specific:** Clear and focused enough to shape decision-making

**Relevant and Purpose Driven:** Reflects the district’s response to the challenges of the day

**Values-Based:** Implies the set of values that are required to support the district

**Challenging:** Inspires employees of the district to do great things and achieve a higher level of standards

**Unique and Memorable:** Highlights what makes the district difference and why it matters

**Inspiring:** Appealing and engages stakeholders to commit to a cause and mindset

Why is a Preferred Future Statement a necessary component of a district’s strategic plan? How might the district use mission, vision, and core values during the implementation of the strategic plan?

**Identify key words, phrases, and takeaways from your homework assignment.**

**Reflect on articles read and the school sites visited to identify key words, phrases, and takeaways from your homework assignment that might assist our team its work to develop a Preferred Future Statement.**

| Article   | 3-5 Key Ideas         |
|---|-----------------------|
| <b>9 Elephants in the Classroom That Should “Unsettle” Us</b>       | 1<br>2<br>3<br>4<br>5 |
| <b>A Transformational Vision for Education in the United States</b> | 1<br>2<br>3<br>4<br>5 |
| <b>10 Principles of Modern Learning</b>                             | 1<br>2<br>3<br>4<br>5 |

| <b>ELECTRONIC SCHOOL INVESTIGATION</b> | <b>3-5 Key Ideas</b>                                     |
|--|--|
| <b>Design 39 Campus</b>                | <b>1</b><br><b>2</b><br><b>3</b><br><b>4</b><br><b>5</b> |
| <b>Stonefields School</b>              | <b>1</b><br><b>2</b><br><b>3</b><br><b>4</b><br><b>5</b> |
| <b>Springfield Renaissance School</b>  | <b>1</b><br><b>2</b><br><b>3</b><br><b>4</b><br><b>5</b> |

**Assess the composite results of the 10 Principles of Modern Learning Audits performed by all School Leadership Teams. (Check strength or Opportunity- then make comment(s))**

| Principle  | Strength | Comment | Opportunity | Comment |
|--|----------|---------|-------------|---------|
| <b>1. Clearly articulated and shared beliefs about learning</b>  |          |         |             |         |
| <b>2. Live a mission and vision deeply informed by new contexts for learning</b>   |          |         |             |         |
| <b>3. Have cultures where personal, self-determined learning is at the center of student and teacher work</b>            |          |         |             |         |
| <b>4. See curriculum as something that is co-constructed to meet the needs and interests of the child</b>                |          |         |             |         |
| <b>5. Embrace and emphasize real-world applications and presentation to real audiences as assessment for learning</b>    |          |         |             |         |
| <b>6. See transparency and sharing as fundamental to a powerful learning environment</b>                                 |          |         |             |         |
| <b>7. Use technology as an amplifier for learning, creating, connecting, communicating, and problem solving</b>          |          |         |             |         |
| <b>8. Develop and communicate in powerful ways new stories of learning, teaching, and modern contexts for schooling.</b> |          |         |             |         |
| <b>9. Encourage communitywide participation in the equitable, effective education of children</b>                        |          |         |             |         |
| <b>10. Embrace and anticipate constant change and evolution</b>  |          |         |             |         |

## What is student agency? What are the expectations for student agency?

### How is student engagement related to student agency?

| DEEP ENGAGEMENT  | ENGAGEMENT  | ACTIVE / STRATEGIC COMPLIANCE   | PASSIVE / RITUAL COMPLIANCE   | PERIODIC COMPLIANCE RETREATISM  | RESISTANCE / REBELLION  |
|--|---|---|---|---|---|
| Students take full ownership of learning activities, displaying high levels of energy, a willingness to ask questions, pursue answers, consider alternatives, and take risks in pursuit of quality. Students persist with the task and will learn at high or profound levels. Learning transcends the formal educational structures. | Students begin taking ownership of learning activities. Their involvement shows concentration and effort to understand and complete the task as well as personal meaning. They do not simply follow directions but actively work to improve the quality of their performance. Students persist with the task and will learn at high levels. | Students participate in learning activities and stay on task without teacher intervention. However, their work has a routine or rote quality and significant thought or commitment to quality is not evident. The tasks have little inherent or direct value to the student, but the student associates it with outcome or results that do have value (such as grades). | Students follow directions in a rote or routine manner. Attention may be mildly distracted and they may need some added teacher attention or direction to remain on task. The student is willing to expend whatever effort is needed to avoid negative consequences. The emphasis is on meeting the minimum requirements. Students will learn at low, superficial levels. | Students do not attend to the work, but do not engage in activity that distracts others. The students often employ strategies to conceal lack of involvement. Students learn little or nothing from the task and when forced through the task either engages in ritual behavior or rebellion. | Students appear blocked, unable or unwilling to participate in learning activities. The refusal may involve cheating, refusing to do the work, or even doing other work in place of that which is expected. Alienation rather than commitment is evident. Students develop poor work and sometimes negative attitudes towards formal education. |

*Harvey F. Silver & Matthew J. Perini, The Eight C's of Engagement; Phillip Schlechty, Engaging Students*

# BUILDING ON OUR CURRENT MISSION AND VISION STATEMENT

**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 they 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 years 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 gives employees a larger sense of purpose so they see themselves as building a cathedral instead of laying stones.
- 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?

| CURRENT MISSION AND VISION   | DRAFT OF PREFERRED FUTURE MISSION AND VISION |
|--|--|
| <p><b>MISSION STATEMENT:</b><br/>The pathway to our vision includes</p> <ul style="list-style-type: none"> <li>• Acknowledging all exceptionalities and expanding opportunities for students.</li> <li>• Maintaining existing and emerging practices.</li> <li>• Encouraging students to take an active role in their academic lives.</li> <li>• Engaging parents and the community for the success of the school.</li> </ul> <p><b>DISTRICT VISION:</b></p> <p>Pennoyer School District 79 staff, parents, and community members will empower students and foster their development in their present and future academic and life experiences.</p> <ul style="list-style-type: none"> <li>• Continue to foster empathetic, inclusive, and nurturing learning environment.</li> <li>• Expand opportunities for collaboration and creative thinking.</li> <li>• Redefine the use of technology.</li> <li>• Create a platform for expression of student voice and choice.</li> </ul> |  |

# WRITING GREAT CORE VALUES/ COMMITMENT STATEMENTS

## Aligning Beliefs/Values/Collective Commitments to Mission and Vision

While creating a vision can be a helpful step in the improvement process, it is not sufficient. The board of education, administrators, and staff must tackle the collective values and commitments they must make and honor in order to achieve the shared vision for their district. Core values are the fundamental beliefs of an organization.

They are the district's beliefs and principles that articulate the culture of the organization. They 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.

**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 core value or belief:**

- ✓ 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?

| VALUE AND COMMITMENT STATEMENTS   |                            |
|---|----------------------------|
| CORE VALUES/BELIEFS   | Future Core Values/Beliefs |
| <p><b>Core Values/Beliefs</b></p> <p><b>Students and Learning</b> We believe that...)</p> <ul style="list-style-type: none"> <li>• All students should be challenged and engaged in learning.</li> <li>• All students have individual talents, interests, and needs that should be identified and met.</li> <li>• All students need a safe and positive environment in which to learn.</li> </ul> <p><b>Teachers and Teaching</b> (We believe that...)</p> <ul style="list-style-type: none"> <li>• The school environment and resources are critical components to teaching and learning.</li> <li>• Teachers should be invested to excel in their craft.</li> <li>• Teachers are the key to student success both inside and outside the classroom.</li> </ul> <p><b>Responsibility of the Schools to the Community and the Community to the Schools</b><br/>(We believe that...)</p> <ul style="list-style-type: none"> <li>• Partnership between the communities served and the district enable greater awareness of student needs.</li> <li>• Values and beliefs of the community are very important to the success of the district.</li> </ul> <p>The district, through the board of education, serves as the steward of community assets.</p> |                            |

## **NEXT MEETING SETTING DIRECTION RETREAT - FEBRUARY 26 [8:30-3:30]**

**The strategic plan team will receive the Vision Retreat Findings and a draft of the Preferred Future Statement within a few days of the Vision Retreat. The team will begin its next meeting finalizing that draft. We will seek feedback on the Preferred Future Statement when we share a draft of the plan following the Setting Direction Retreat.**

**The SETTING DIRECTION RETREAT ANSWERS THE QUESTION, “*How do we great from where we are to where we want to be?*”**

**Long-range Goals:** Indicators, Measures and Targets

**Strategies:** Gaps that must be addressed during the span of this strategic plan to achieve the mission, vision and goals of the district.