Translating a Mission into a Desired Outcome

Annual Conference | October 6, 2016

Chris Shropshire
Field Operations Manager

Ana Martinez
Executive Director
Midwest Regional Program
New Leaders

The Governor John Engler Center for Charter Schools | Central Michigan University
Agenda

- Common Definition for Strategic Thinking
- WHY think Strategically
- Clarify the WHY
- Define and Determine the HOW
- Measure and Monitor the WHAT
What is Strategic Thinking?

To think about, view, assess and create future success
Strategic Thinking

“All men can see the tactics whereby I conquer, but what none can see is the strategy out of which victory is evolved.

Sun Tzu
Strategic Thinking: Starting with the WHY

• WHY? = The Purpose
  • What is your cause? What are your beliefs?

• HOW? = The Process
  • The actions taken to realize the WHY, guiding values and principles.

• WHAT? = The Results
  • What do you do? The result of WHY. The proof.

Source: (Sinek, S., 2011)
Clarity of the **WHY**

A purpose, cause or belief, reason for being beyond products and services

Answers the Question:
**Why do we do what we do?**
Clarity of WHY

Any student that walks through our school doors, regardless of background, will receive a high quality education that will result in options for careers and colleges of their choosing and transform their life trajectory for generations to come.

WHY

To transform the trajectory of lives to come.
### Clarity of WHY

**College Matriculation and Graduate Rates of Chicago Public School Students***

<table>
<thead>
<tr>
<th>Description</th>
<th>Value (in %)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Of 100 CPS 9th Graders, 73 (73%) Graduate High School in Four Years</td>
<td>73</td>
</tr>
<tr>
<td>Of 73 High School Graduates, 29 (40%) Enroll in a Four Year College in the Fall</td>
<td>29</td>
</tr>
<tr>
<td>Of 29 Four Year College Enrollees, 14 (49%) Earn a Degree Within Six Years</td>
<td>14</td>
</tr>
<tr>
<td>Of 73 High School Graduates, 3 (3%) Take a Different Route to a Four Year Degree</td>
<td>17</td>
</tr>
</tbody>
</table>

Clarity of WHY

Clarity of WHY

Incarceration Rate

<table>
<thead>
<tr>
<th>Education Level</th>
<th>Incarceration Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>High School Dropout</td>
<td>6.3%</td>
</tr>
<tr>
<td>High School Graduate</td>
<td>1.0%</td>
</tr>
<tr>
<td>2 Year Degree</td>
<td>0.7%</td>
</tr>
<tr>
<td>4 Year Degree</td>
<td>0.1%</td>
</tr>
</tbody>
</table>

Civic Engagement

<table>
<thead>
<tr>
<th>Education Level</th>
<th>Volunteerism Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>High School Dropout</td>
<td>9.0%</td>
</tr>
<tr>
<td>High School Graduate</td>
<td>18.6%</td>
</tr>
<tr>
<td>2 Year Degree</td>
<td>30.7%</td>
</tr>
<tr>
<td>4 Year Degree</td>
<td>41.8%</td>
</tr>
</tbody>
</table>

Discipline of the HOW

The actions taken to realize the belief, values, principles that guide HOW to further the cause (WHY)

Answers the Question:
How are you going to achieve it (WHY)?
The Discipline of HOW

The vision of Rowe Elementary School is to ensure that all scholars in grades K-8 are college and career ready.

- **PRIDE**: We cultivate the college mindset in our scholars and in our families.
- **SUCCESS**: We provide a robust and rigorous academic program.
- **HONOR**: We develop the social and emotional skills of our scholars and our families.
The Discipline of HOW

**STRATEGY**

We cultivate the college mindset in our scholars and in our families

**TACTICS**

Consistently and repeatedly setting college expectations

Exposure to college-like experiences for scholars, inside and outside of the classroom to create familiarity and comfort

Aligning scholars, teachers, and families on the expectation

Preparing scholars for high school and college success by incorporating instructional teachings around building the academics mindsets necessary to experience success in high school and college
The Discipline of HOW

STRATEGY

We provide a robust and rigorous academic program

TACTICS

Delivering an integrated curricular program that is horizontally and vertically aligned and provides a shared understanding of learning outcomes for every grade level

Recruiting, developing and retaining great teachers

Using real-time data to course correct

Bringing joy to learning
The Discipline of HOW

**STRATEGY**

- We develop the social and emotional skills of our scholars and our families

**TACTICS**

- Using evidenced based models to build cohesive school culture that empowers families and scholars to advocate for their needs
- Providing explicit instruction in SEL skills and ensuring there are clear outcomes and measures of success across grade level bands
- Creating opportunities for SEL skill application
- Building teacher capacity around SEL
The results of those actions – everything that you say and do

Consistency of WHAT

Answers the Question: What do you do?
Rowe Scholars Outperform National Reading and Math Results

- 96% of current 8th grade scholars qualify for Chicago’s selective enrollment high schools
- 95% of Rowe scholars are displaying expected/above-average social-emotional growth
- Rowe’s middle school exceeded NWEA goals in both growth and attainment for reading and math
- Rowe Elementary School earned a 1+ rating, the highest possible rating given to Chicago Public Schools two years in a row
The average 6th grader at Rowe ended the school year at a beginning of year 8th grade level in both reading and math and the average 7th grader ended the school year at beginning of year 10th grade level in both reading and math.

Rowe Scholars are on track to enter 9th grade ahead of grade level and more prepared than most CPS students.

The Class of 2024, Rowe’s first graduating class, will enter high school with a college mindset and the persistence to finish high school, enroll in, and graduate from college.

82% of these scholars are low income and college will empower them to change the life trajectory for themselves and their families.
Creating Value Through the **WHY**

- **WHY:**
  - describes the benefits of engaging your organization

- **HOW:**
  - informs as to how your organization will meet stakeholder needs

- **WHAT:**
  - illustrates what distinguishes an organization from the competition
The Golden Circle + The Cone
Measuring & Managing Performance

- Vision Aligned Outcomes
- Define Performance Indicators
- Reporting & Monitoring Performance
- Set Performance Targets
- Identify Performance Measures
Outcomes and Outcome Statements

• Outcomes define what is desired to be accomplished

• Outcome statements clearly described who changed and what intended change is expected to occur
Performance Indicators

• Identifies what will be monitored and evaluated to demonstrate results

• Must be specific, observable and measurable

• Answers questions:
  • How will you know when changes have occurred?
  • How will you know when you have achieved the outcomes?
Finding the Right Measures

• Step 1: Begin with the end in Mind

• Step 2: Be sensory specific

• Step 3: Check the bigger picture

• Step 4: What’s the evidence?

• Step 5: Name the Measure

(Source: Barr, S., 2009)
Performance Targets

Setting a specified desired level of achievement; specifying a particular level of achievement related to the outcome.

Answers the Question: What level of performance is reasonably expected?
5 Steps to Use Measures to Reach Performance Targets

• Step 1: Set sensible targets

• Step 2: Prioritize the performance gaps

• Step 3: Find the causes

• Step 4: Choose high-leverage solutions

• Step 5: Look for signals and check for impact

(Source: Barr, S., 2009)
Reporting and Monitoring Performance

• Performance Reports need to answer 3 questions

  • What is performance doing?
  • Why is performance doing that?
  • Now what are we going to do about it?

(Source: Barr, S., 2009)
ROWE APPLICATION: Measuring and Managing Performance
Measuring & Managing Performance

- Vision Aligned Outcomes
- Define Performance Indicators
- Reporting & Monitoring Performance
- Set Performance Targets
- Identify Performance Measures

Performance Management
Rowe Vision, Mission, & Core Values

The vision of Rowe Elementary School is to ensure that all scholars in grades K-8 are college and career ready.

<table>
<thead>
<tr>
<th>PRIDE</th>
<th>SUCCESS</th>
<th>HONOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>We cultivate the college mindset in our scholars and in our families</td>
<td>We provide a robust and rigorous academic program</td>
<td>We develop the social and emotional skills of our scholars and our families</td>
</tr>
</tbody>
</table>

Vision Aligned Outcomes
## Rowe’s Scorecard

### Performance Indicators:
- Indicators were Mission aligned (Culture, Academics, and SEL)
- Indicators needed to include Operations and Finances as these are key to leading a high performing school as well
- It equipped all stakeholders with shared language about the story we would tell about our scholars, our school, and our community
- It required us to think critically about what data we would collect, with what frequency, and how we'd analyze and respond to it

### Metrics

<table>
<thead>
<tr>
<th>Metric</th>
<th>Current status</th>
<th>Current target</th>
<th>Current value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Operations</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of empty seats</td>
<td>Off target</td>
<td>3</td>
<td>7</td>
</tr>
<tr>
<td>Scholar waitlist</td>
<td>Off target</td>
<td>200</td>
<td>101</td>
</tr>
<tr>
<td>Average scholars per class</td>
<td>Off target</td>
<td>28</td>
<td>26.208333333</td>
</tr>
<tr>
<td>Attrition rate</td>
<td>On target</td>
<td>8%</td>
<td>0%</td>
</tr>
<tr>
<td>Retention rate</td>
<td>On target</td>
<td>3%</td>
<td>0%</td>
</tr>
<tr>
<td>Attendance rate</td>
<td>On target</td>
<td>95%</td>
<td>97%</td>
</tr>
<tr>
<td>Variance in number of classrooms required vs. plan</td>
<td>On target</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Parent NPS</td>
<td>On target</td>
<td>90%</td>
<td>8880%</td>
</tr>
<tr>
<td>Teacher NPS</td>
<td>Off target</td>
<td>80%</td>
<td>-4%</td>
</tr>
<tr>
<td>Staff retention</td>
<td>Off target</td>
<td>95%</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Discipline/Culture</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average referrals per day</td>
<td>On target</td>
<td>4</td>
<td>2.933333333</td>
</tr>
<tr>
<td>Referrals by behavior type</td>
<td>On target</td>
<td>45%</td>
<td>37%</td>
</tr>
<tr>
<td>Scholar climate survey</td>
<td>On target</td>
<td>80%</td>
<td>86%</td>
</tr>
<tr>
<td><strong>Academics</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Math performance*</td>
<td>On target</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Literacy performance*</td>
<td>Off target</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Science performance*</td>
<td>On target</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Social studies performance*</td>
<td>On target</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Overall ISAT*</td>
<td>Off target</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Enrichment performance*</td>
<td>Off target</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Percent of teachers who are proficient or distinguished</td>
<td>Off target</td>
<td>85%</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Financial</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current year surplus/deficit</td>
<td>On target</td>
<td>$ (20,000)</td>
<td>$ 249,107</td>
</tr>
<tr>
<td>10-year financial picture</td>
<td>On target</td>
<td>$ -</td>
<td>$ 396,097</td>
</tr>
<tr>
<td>Fundraising raised vs. planned fundraising</td>
<td>On target</td>
<td>$ 100,000</td>
<td>$ -</td>
</tr>
<tr>
<td>Fundraising through breakeven point</td>
<td>On target</td>
<td>$ 5,700,000</td>
<td>$ 5,063,103</td>
</tr>
<tr>
<td>Breakeven school year</td>
<td>On target</td>
<td>2019-2020</td>
<td>2019-2020</td>
</tr>
<tr>
<td><strong>SEL</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DESSA results</td>
<td>On target</td>
<td>15%</td>
<td>10%</td>
</tr>
<tr>
<td><strong>Special Education</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Percent benchmarks met by students with IEPs</td>
<td>Off target</td>
<td>95%</td>
<td>94%</td>
</tr>
</tbody>
</table>
Stages of Backwards Design

Step 1: Identify Desired Results

In step 1, we consider goals, examine content standards, and review curriculum expectations. We clarify priorities!

Step 2: Determine acceptable evidence

In step 2, we think about how we will know if students have achieved the desired results. What will we accept as evidence of student understanding?

Step 3: Plan learning experiences and instruction

In step 3, with clearly identify results and appropriate evidence of understanding, we think through appropriate instructional activities.

Identify Performance Measures
Step 1: Identify Desired Results

**Stages of Backwards Design**

- **Identify Desired Results**: the first step in backwards design. This involves setting a vision for scholar learning and goals that align to this vision. This represents the ultimate destination for scholar learning.
- **Determine acceptable evidence**: provides the evidence that scholars have met the goal. Assessments are critical at both the summative (year-long) and formative (unit) level because they tell whether scholars are on track to meet their year-long goal.
- **Plan learning experiences**: LTPs provide a logical, well-timed sequence of all learnings that are scaffolded to build scholar understandings and will ultimately lead to scholar mastery on the summative assessment.

**Rowe’s Desired Results**

**Goal 1 Literacy:**
- % of scholars meeting reading growth goals on NWEA (incremental growth every year)
- Average Reading attainment on NWEA (ranges by grade level)
- Fountas and Pinnell growth (1.0-1.5 years informed by baseline)

**Goal 2 Math:**
- % of scholars meeting math growth goals on NWEA (incremental growth every year)
- Average Math attainment on NWEA (ranges by grade level)

**Goal 3 Enrichment:**
- Scholars average 75% mastery on rigorous drama, music, and art assessment
- Scholars average 80% on rigorous PE assessment

**Goal 4: DESSA**
- 80% of scholars score “Typical” on DESSA

**Goal 5: Scholar Climate Survey**
- All classrooms score a “4” average on a 5 point scale on scholar climate survey
Step 2: Determine Acceptable Evidence

**Stages of Backwards Design**

<table>
<thead>
<tr>
<th>Identify Desired Results</th>
<th>Determine acceptable evidence</th>
<th>Plan learning experiences</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identify Desired Results - the first step in backwards design. This involves setting a vision for scholar learning and goals that align to this vision. This represents the ultimate destination for scholar learning.</td>
<td>Determine acceptable evidence - provides the evidence that scholars have met the goal. Assessments are critical at both the summative (year-long) and formative (unit) level because they tell whether scholars are on track to meet their year-long goal.</td>
<td>Plan learning experiences - LTPs provides a logical, well-timed sequence of all learnings that are scaffolded to build scholar understandings and will ultimately lead to scholar mastery on the summative assessment.</td>
</tr>
</tbody>
</table>

**Evidence of Scholar Learning**

**Literacy:**
- STEP, Fountas and Pinnell, NWEA Map

**Math:**
- NWEA Map

**Social Studies:**
- Unit assessments & course-wide tracking

**Enrichments:**
- Drama, Music, PE, Visual Art: teacher created performance tasks

**SEL:**
- DESSA, Scholar Climate Survey

Identify Performance Measures
Step 3: Plan Learning Experiences

**Stages of Backwards Design**

<table>
<thead>
<tr>
<th>Identify Desired Results</th>
<th>the first step in backwards design. This involves setting a vision for scholar learning and goals that align to this vision. This represents the ultimate destination for scholar learning.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Determine acceptable evidence</td>
<td>provides the evidence that scholars have met the goal. Assessments are critical at both the summative (year-long) and formative (unit) level because they tell whether scholars are on track to meet their year-long goal.</td>
</tr>
<tr>
<td>Plan learning experiences</td>
<td>LTPs provides a logical, well-timed sequence of all learnings that are scaffolded to build scholar understandings and will ultimately lead to scholar mastery on the summative assessment.</td>
</tr>
</tbody>
</table>

**Planning @ Rowe**

- Common Core Aligned LTPs
- Unit Plans
- Lesson Plans

**Reporting & Monitoring Performance**
Monitoring Progress through Data Cycle

**Collect Data**

Am I getting information that measures whether or not scholars are mastering the standards?

**Analyze Data**

What does the data say about what scholars are learning and what aren’t they? What’s at the root of why they aren’t learning? How do we know?

**Create Action Plan**

What new learning experiences can I create to help my scholars learn what they did not master and how can I continue to push all my scholars to get stronger at the standard?
Performance Management (PM)

- Frequency: 2Xs a year; MOY and EOY
- Attached to Performance Pay & Salary Increase
- Qualitative & Quantitative Data
- Managed by the Principal
- Linked to Promotion and Retention
- PCC Informs PM Summaries

Performance Management
Performance Management (PM)

<table>
<thead>
<tr>
<th>Point Range</th>
<th>Ranking</th>
<th>Payout</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;50 pts</td>
<td>Unsatisfactory</td>
<td>0%</td>
</tr>
<tr>
<td>50 – 74 pts</td>
<td>Unsatisfactory</td>
<td>.94%</td>
</tr>
<tr>
<td>74 – 89 pts</td>
<td>Developing</td>
<td>1.88%</td>
</tr>
<tr>
<td>90 – 100+ pts</td>
<td>Proficient</td>
<td>3.75%</td>
</tr>
<tr>
<td>&gt;101 pts</td>
<td>Distinguished</td>
<td>5%</td>
</tr>
</tbody>
</table>

Classroom Performance 40%
Teacher Observation 20%
Grade Level & School Performance 20%
Core Values 20%
“To begin with the end in mind means to start with a clear understanding of your destination. It means to know where you’re going so that you better understand where you are now so that the steps you take are always in the right direction”

- Stephen R. Covey “The 7 Habits of Highly Effective People”
CONTACT INFO/QUESTIONS

Chris Shropshire
Manager of Field Operations
405-625-0488  l  cshropshire@thecenterforcharters.org

Ana Martinez
Executive Director, Midwest Regional Programs
New Leaders
312-546-8247  l  amartinez@newleaders.org