Examining Organizational Strategy

Board Development Series

May 24, 2016

Strategic Thinking

To think about, view, assess and create future success

Organizational Assessment

Organizational Strategy To what extent does the organization use a strategic plan to organize program and initiative priorities?	Basic	Emerging	Strong	Exemplary
	No strategic plan; or if strategic plan exists, fails to inform major initiatives	Strategic plan informs some major initiatives	Strategic plan informs most major initiatives	Strategic plan informs all major initiatives
	Major initiatives/programs frequently generated, crisis-driven and uncoordinated with strategy	Major initiatives superficially aligned with strategy	Major initiatives significantly aligned with strategy	Major initiatives tightly aligned with strategy; alignment understood well by all stakeholders
	Limited understanding of current initiatives. No complete list of initiatives in one place.	Some understanding of current efforts	Significant understanding of current efforts	Deep understanding of current efforts. New projects not authorized without assessing current initiatives.
	No effort to avoid duplication across programs. No effort to eliminate old initiatives	Some effort to avoid duplication across programs	Efforts exist to coordinate programs and avoid duplication	Limited number of major initiatives. No duplication across programs

Goal Setting To what extent does the organization use data and analysis to set goals for programs and major initiatives?	Basic	Emerging	Strong	Exemplary
	Major initiatives are introduced without outcome of implementation goals	Major initiatives are introduced with established goals, but goals not informed by analysis, nor aligned with strategic plan	Major initiatives introduced with goals, drivers, descriptions, aligned actions; all aligned with the strategic plan	Major initiatives introduced with goals, drivers, descriptions, aligned actions; all aligned with the strategic plan; clear measures/metrics set for monitoring progress
	Goals and measures/metrics non-existent	Goals and measures/metrics exist but not created with evidence or analysis	Goals and measures/metrics exist, established from trend data and research	Goals and measures/metrics exist, are both challenging and realistic and established from trend data, research, and predictive analytics.
		Goals and measures/metrics are not well connected to implementation, operational outputs or outcomes	Goals and measures/metrics are largely connected to implementation, operational outputs or outcomes	Goals and measures/metrics are always connected to implementation, operational outputs or outcomes
	No monitoring or progress	Little monitoring or progress	Monitoring of progress largely focused on implementation, but not measureable outcomes	Monitoring of progress includes review of implementation, measurement of outcomes and use of predictive analytics to anticipate progress and adjust tactic

Program Management Monitoring To what extent are data used to understand, manage and monitor current program operations?	Basic	Emerging	Strong	Exemplary
	No monitoring of program operations	Occasional monitoring of program operations	Formal monitoring of program operations against goals and measures/metrics, and timelines established at program launch	Formal monitoring of programs against goals, measures/metrics, and timelines. Examination of different scenarios that may alter program to increase impact, lower cost, or respond to change
	Unaware of relevant research	Awareness of relevant research, but not used to make decisions	Awareness of relevant research; research used to make decisions	Relevant research used to drive further internal research that informs and evaluates after pertinent information collected
	No attention on results from prior programs	Little attention on results from prior programs	Some attention on results from prior programs that were evaluated with pre-established criteria	High attention to results that use data from prior programs and were evaluated with rigor and explicit pre-established criteria
	Similar programs not compared in terms of value to student outcomes	Similar programs superficially compared in terms of value to student outcomes	Similar programs compared with some depth in terms of value to student outcomes	Similar programs compared in terms of impact on student outcomes and cost-effectiveness

Evaluation and Decision Making To what extent does the organization evaluate the outcomes of its programs and major initiatives?	Basic	Emerging	Strong	Exemplary
	No evaluation plans exist	Some evaluation plans exist, often created after program start, but are often vague and lack actionable results	Many evaluation plans exist before program starts, are explicit and moderately strong	Evaluation plans exist for all major initiatives, and are explicit to determine initiatives' impact and next steps
	Outcome evaluation not considered in decisions to continue, expand, or terminate programs	Outcome evaluations occasionally influence decisions to continue, expand, or terminate programs	Outcome evaluations often influence termination or expansion decisions	Outcome evaluations always influence termination or expansion decisions, including standard use of sunset clauses to allow program expansion to be periodically evaluated
	Decisions based on prior beliefs and assumptions rather than evaluation results	Decisions sometimes based on evaluation results, though these still may support prior beliefs or assumptions	Decisions more often based on evaluation results and sometimes are contrary to prior beliefs or assumptions	Decisions always based on and driven by evaluation results
	Termination decisions made erratically due to politics, shifting priorities or immediate resource needs (i.e., budget crisis)	Termination decisions rarely based on results; more often based on politics, shifting priorities or immediate resource needs (i.e., budget crisis)	Termination decisions often based on results; sometimes politics, shifting priorities or immediate resource needs (i.e., budget crisis)	Termination decisions always based on results of evaluations; results generally immune to external influence

Adapted from Harvard SDP

Strategic Planning

Organizing the present based on the desired results

Purpose: Change the future of Chicago's children for generations to come

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

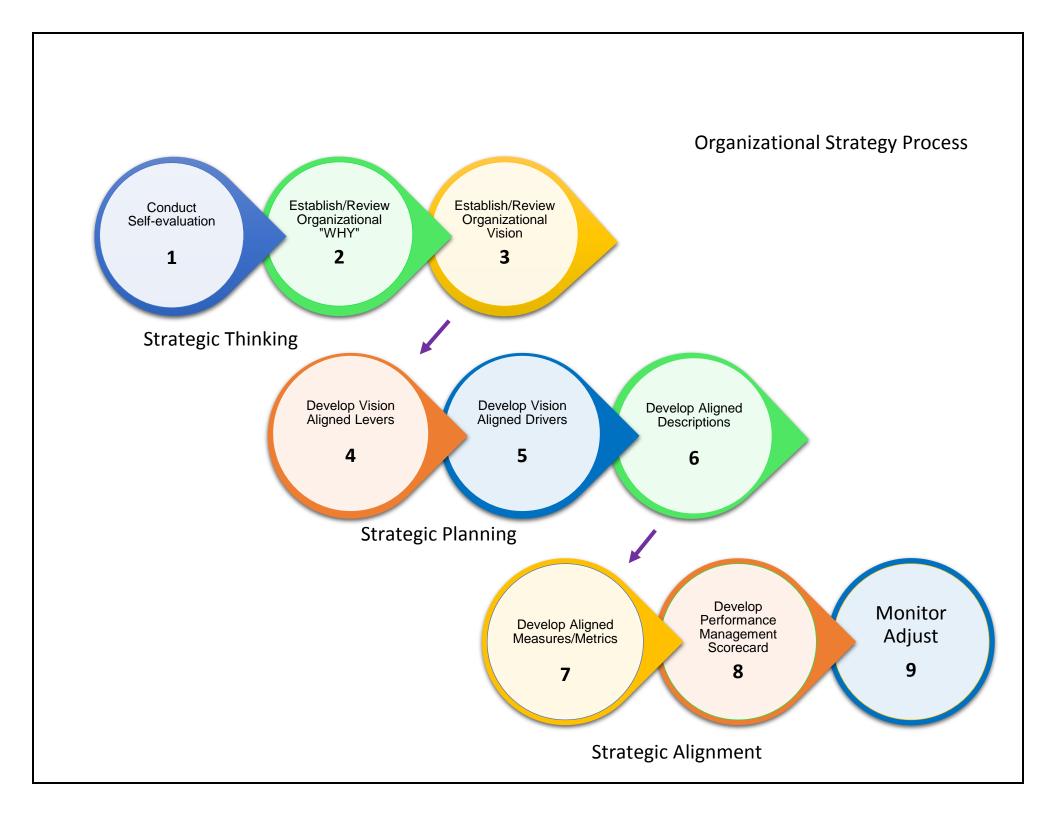| ROWE ELEMENTARY CHARTER SCHOOL		
We cultivate the college mindset in our scholars and our families	We provide a robust and rigorous academic program	We develop the social and emotional skills of our scholars and our families
PRIDE	SUCCESS	HONOR
• Consistently and repeatedly set college expectations • Expose scholars to college-like experiences inside and outside of the classroom to create familiarity and comfort • Align scholars, teachers, and families on the expectations • Incorporate instructional teachings around the building to the academic mindset necessary to experience success in high school and college	• Deliver an integrated curricular program that is horizontally and vertically aligned and provides a shared understanding of learning outcomes for every grade level • Recruit, develop and retain great teachers • Use real-time data to course correct • Bring joy to learning	• Use evidenced based models to build cohesive school culture that empowers families and scholars to advocate for their needs • Provide explicit instruction in SEL skills and ensuring there are clear outcomes and measures of success across grade level bands • Create opportunities for SEL skill application • Build teacher capacity around SEL

LEVER (2) GOAL	DRIVER	DESCRIPTION
Provide a rigorous and robust academic program SUCCESS	2.1 Deliver an integrated curricular program that is horizontally and vertically aligned and provides a shared understand of learning outcomes for every grade level	2.1.1 Maximize instructional time with scholars from 8:00am-4:15pm 2.1.2 Maximize number of instructional days during calendar 2.1.3 Daily meaningful homework that is developmentally appropriate for grade 2.1.4 Annual "House in the Wood" trip to camp in grades 3, 4, 6, and 8 2.1.5 Providing exposure to a variety of enrichments 2.1.6 Principal and teacher-driven, proven curriculum deploying inclusion model for differentiated instruction **Establish Aligned Actions**
	2.2. Recruit, develop and retain great teachers 2.3 Use real-time data to course correct 2.4 Bring joy to learning	2.2.1 Stringent recruiting process, built-in planning time, ongoing professional development (e.g. half-day Wednesdays, data analysis days and staff work days) 2.2.2 Multi-week summer professional development session 2.2.3 Deans assigned to smaller teams to provide more targeted coaching 2.2.4 Performance Communication Cycle provides continuous coaching to drive teacher performance 2.2.5 Teacher feedback and leadership sought through multiple forums (committees, grade level chairs) 2.2.6 Teacher career paths supported and encouraged (advanced degrees, licensure) **Establish Aligned Actions**

LEVER (2) GOAL	DRIVER	DESCRIPTION	ALIGNED ACTIONS
Provide a rigorous and robust academic program SUCCESS	2.1 Deliver an integrated curricular program that is horizontally and vertically aligned and provides a shared understand of learning outcomes for every grade level	2.1.1 Maximize instructional time with scholars from 8:00am-4:15pm 2.1.2 Maximize number of instructional days during calendar 2.1.3 Provide daily meaningful homework that is developmentally appropriate for grade 2.1.4 Annual "House in the Wood" trip to camp in grades 3, 4, 6, and 8 2.1.5 Providing exposure to a variety of enrichments 2.1.6 Principal and teacher-driven, proven curriculum deploying inclusion model for differentiated instruction	2.1.1.a All ancillary services will transpire from 7:15 – 7:45 am. 2.1.1.b All grade ELA block 8:30 – 10:30 2.1.1.c All grade math block 1:00 – 2:30 2.1.2.a Calendar established with 190 instructional days 2.1.3.a Assigned homework will be reviewed with weekly lesson plans by academic Dean 2.1.3.b Homework shall be assigned by the following guidelines K- 10 min per day + 10 min reading 1st – 15 min per day + 15 min reading 2nd – 15 min per day + 20 min reading 3rd – 20 min per day + 30 min reading 4th – 25 min per day + 35 min reading 5th – 30 min per day + 40 min reading 6th – 8th – 45 min per day + 50 min reading Establish Measures and Metrics

LEVER (2) GOAL	DRIVER	DESCRIPTION	ALIGNED ACTIONS	MEASURES/METRICS
Provide a rigorous and robust academic program SUCCESS	2.1 Deliver an integrated curricular program that is horizontally and vertically aligned and provides a shared understand of learning outcomes for every grade level	2.1.1 Maximize instructional time with scholars from 8:00am-4:15pm 2.1.2 Maximize number of instructional days during calendar	2.1.1.a All ancillary services will transpire from 7:15 – 7:45 am. 2.1.1.b All grade ELA block 8:30 – 10:30 am 2.1.1.c All grade math block 1:00 – 2:30 2.1.2.a Calendar established with 190 instructional days	2.1.1.a 100% of students will be seated and ready for instruction at 7:55 2.1.1.b 100% of reading instruction will transpire from 8:30 – 10:30 with no interruptions, assemblies, specials or additional meetings. – 95% of students on grade level will meet and exceed typical growth as measured on NWEA MAP – 95% of students 1 year below grade level will meet and exceed typical growth by 1.5 years as measured on NWEA MAP – 95% of students 2 years below grade level will meet and exceed typical growth by 2.0 years as measured on NWEA MAP 2.1.1.c 100% of math instruction will transpire from 1:00 – 2:30 with no interruptions, assemblies, specials or additional meetings (Develop performance management scorecard) 2.1.2.a Board shall approve instructional calendar that has 190 days (Develop performance management scorecard)

Organizational Strategy Process

Conduct Self-evaluation

1

Establish/Review Organizational "WHY"

2

Establish/Review Organizational Vision

3

Strategic Thinking

Develop Vision Aligned Levers

4

Develop Vision Aligned Drivers

5

Develop Aligned Descriptions

6

Strategic Planning

Develop Aligned Measures/Metrics

7

Develop Performance Management Scorecard

8

Monitor Adjust

9

Strategic Alignment

Strategic Alignment

Aligning the organization's actions with its objectives

Purpose: Change the future of Chicago's children for generations to come

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

Performance Indicator	Target/Goal	Evidence	Development Scale			Status
Operations			1	2	3	
1. Number of empty seats	School will have ≥ 3% empty seats on fall and spring count day	Operations manager shall provide summary report (Organizational Dashboard) in Nov and April	①1	2	3	Met target
2. Scholar wait list			1	2	3	
3. Average scholars per class			1	2	3	
4. Attrition rate			1	2	3	
5. Retention rate			1	2	3	
6. Attendance rate	School will have weekly attendance rate ≥ 90%	Operations manager shall provide summary report (Organizational Dashboard) at monthly Board meeting	1	②2	3	Progressing
7. Variance in # of classrooms verses future plan			1	2	3	
8. Parent satisfaction survey			1	2	3	
9. Student satisfaction survey			1	2	3	
10. Staff retention			1	2	3	

Performance Indicator	Target/Goal	Evidence	Development Scale			Status
Discipline and Culture			1	2	3	
1. Average referrals per day	School will have ≥ 5 referrals per day	Dean of Students generates weekly report for principal. Summary provided to Board monthly	1	2	③3	Did not meet target
2. Referrals by behavior type			1	2	3	
3. Scholar climates survey			1	2	3	

Development Scale   1=Secure   2=Some development needed   3=Considerable development needed

Performance Indicator	Target/Goal	Evidence	Development Scale	Status
Academics			1 2 3	
1. Math performance	1. 95% of students on grade level will meet and exceed typical growth as measured on NWEA MAP 2. 95% of students 1 year below grade level will meet and exceed typical growth by 1.5 years as measured on NWEA MAP 3. 95% of students 2+ years below grade level will meet and exceed typical growth by 2.0 years as measured on NWEA MAP	Principal shall provide Board with academic summary (Organizational Dashboard) in Nov/Feb/June indicating percentage of students:	1 2 3	**Did not meet target**
		a. On grade level that meet or exceed typical growth as measured on NWEA MAP	1 ② 3	
		b. One (1) year below grade level that meet or exceed typical growth by 1.5 years as measured on NWEA MAP	1 ② 3	
		c. Two (2+) years below grade level that meet or exceed typical growth by 2.0 years as measured on NWEA MAP	1 2 ③	
1.1 FRL			1 2 3	
1.3 Male			1 2 3	
1.4 Female			1 2 3	
2. Literacy performance			1 2 3	
3. Science performance			1 2 3	
4. Social studies performance			1 2 3	
5. Overall M-Step			1 2 3	
5.1 FRL			1 2 3	
5.2 Sub-groups			1 2 3	
5.3 Male			1 2 3	
5.4 Female			1 2 3	
6. Enrichment performance			1 2 3	

Development Scale   1=Secure   2=Some development needed   3=Considerable development needed

Performance Indicator	Target/Goal	Evidence	Development Scale			Status
SEL			1	2	3	
1. Average referrals per day			1	2	3	
2. Referrals by behavior type			1	2	3	
3. Scholar climates survey			1	2	3	

Performance Indicator	Target/Goal	Evidence	Development Scale			Status
Financial			1	2	3	
1. Current year surplus/deficit	School will have a current year surplus of at least $50,000 to be added to the fund balance	Board will receive monthly financial statements to monitor the surplus on an interim basis – final surplus will be reviewed upon completion of the annual audit	①	2	3	Met target
2. Fund balance			1	2	3	
3. Fall enrollment	Actual fall enrollment will meet the projected budgeted enrollment	Board will receive monthly enrollment update reports from June – Sept with the final report in Oct	①	2	3	Met target
4. Instructional spending			1	2	3	
5. Budget to actual variance	Total actual revenues and expenditures will end the year with a positive variance (as compared to the final budget) of 3% or less	Board will receive monthly financial statements to monitor the budget variance on an interim basis – final variance will be reviewed upon completion of the annual audit	①	2	3	Met target
6. Audit findings and recommendations			1	2	3	

Development Scale   1=Secure   2=Some development needed   3=Considerable development needed

NOTES: