



Strategic Planning Data Retreat

Welcome and Introductions

- **Who** is in the room?
- **What** are we here to do?
- **Why** is this an important event?



Table 1	Article		Table 4	Article
Dan Sullivan (District Leader)	A		Kelly Zimmerman (District Leader)	A
Gloria Sada (Parent Leader)	B		Mike Somone (Union Leader)	B
Laura Legare (Staff Member-NMS)	C		Blanca Ojeda (Staff Member-WP)	C
Juan Briceno (Parent/Community)	A		Peg O'Connell (Board Member)	A
Patricia Salzmann (Staff Member-RI)	B		Angelica Hernandez (Staff Member-MMS)	B
			Trina James (Staff Member-SI)	C
Table 2	Article		Table 5	Article
Eulalia Valdez (District Leader)	A		LaTesh Travis (District Leader)	A
Kevin Grochowski (Building Leader-MMS)	B		Kenya Guzman-Sandoval (Parent Leader-BPAC)	B
Gina Baran (Staff Member-WP)	C		Laura Heneghan (Staff Member- RI)	C
Luis Pizarro (Student Leader-NMS)	A		Armani Phillips (Student Leader-MMS)	A
Charise Walker (Parent/Community)	B		Alma Tilapa (Parent/Community)	B
			Sunil Mody (Building Leader-NMS)	C
Table 3	Article			
Tracy Bodenstab (Building Leader-WP)	A			
Samantha Cepeda (Staff Member-SI)	B			
Julie Arensten (Staff Member-NMS)	C			
Gabby White (Student Leader-Leyden)	A			
Dena Bigham (Parent/Community)	B			
Theresa Gargano (Union Leader)	C		Updated: 12:00 PM 4/28/2022	

For the **LOVE** of Learning



Strategic Planning

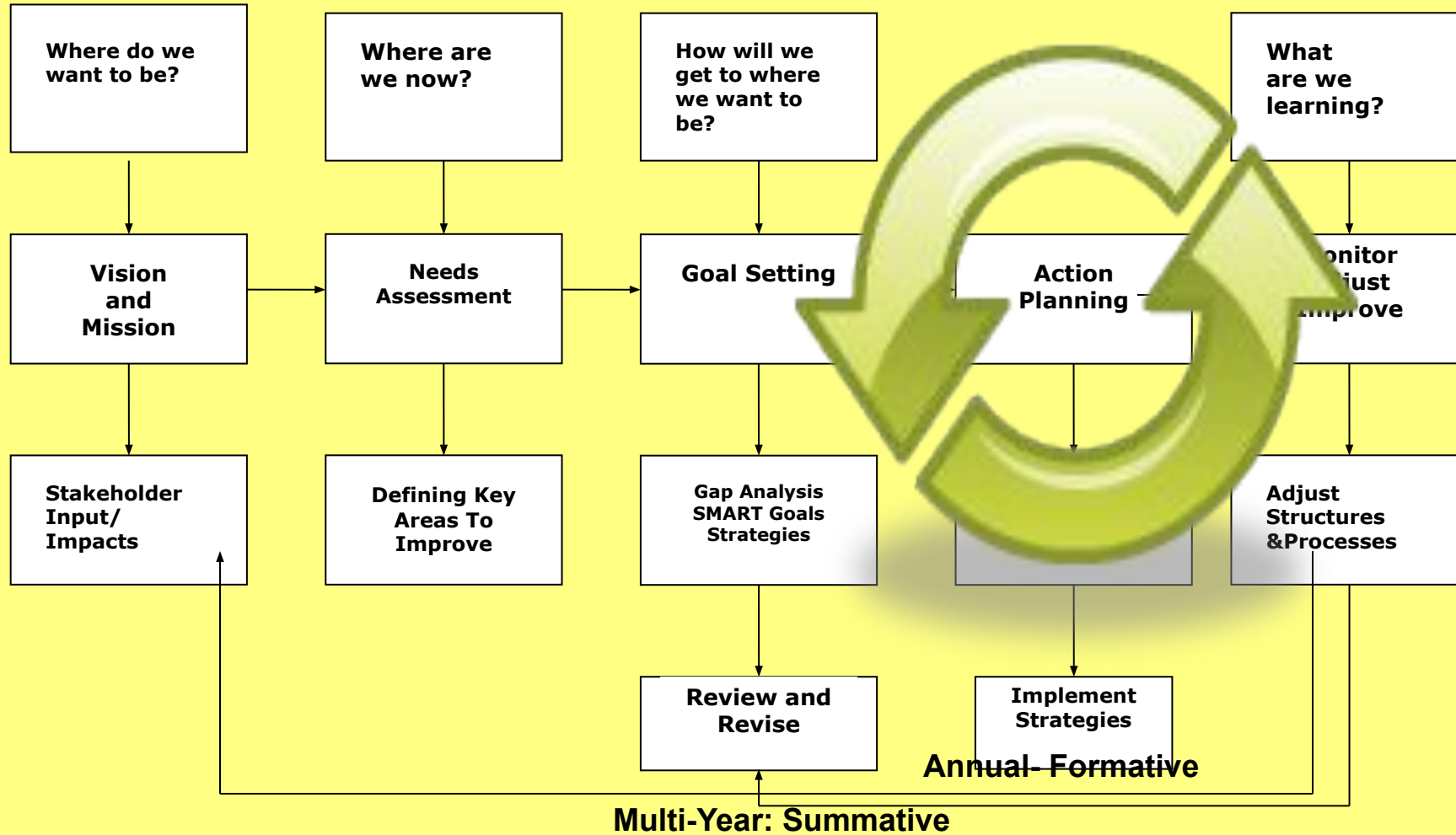




FOUNDATION OF CONTINUOUS IMPROVEMENT

Pillars	Guiding Question
MISSION	<i>What is our fundamental purpose; why do we exist?</i>
VISION	<i>What must we become in order to accomplish our fundamental purpose?</i>
GOALS	<i>How will we know if we are making a difference?</i>
VALUES	<i>How must we behave to achieve our mission, vision and goals?</i>

Strategic Planning Process





**WHERE DO WE WANT
TO BE?**

**HOW DO WE GET FROM
WHERE WE ARE TO
WHERE WE WANT TO BE?**

WHERE ARE WE NOW?

It is good to
have an end to
journey toward;
but it is the
journey that
matters in the
end.

Ursula K. LeGuin 1999

CONTINUOUS IMPROVEMENT



**Data Retreat: Where are we now?
To paint a data picture that allows us
to identify our current strengths,
weaknesses, opportunities, and
threats.
In person 6-hour session**

**"Data by itself is useless.
Data is only useful if
you apply it."**

Todd Park

InspirationBoost.com

Data Leads to New Discoveries

Data is not about adding more to your plate. Data is about making sure you have the right things on your plate.



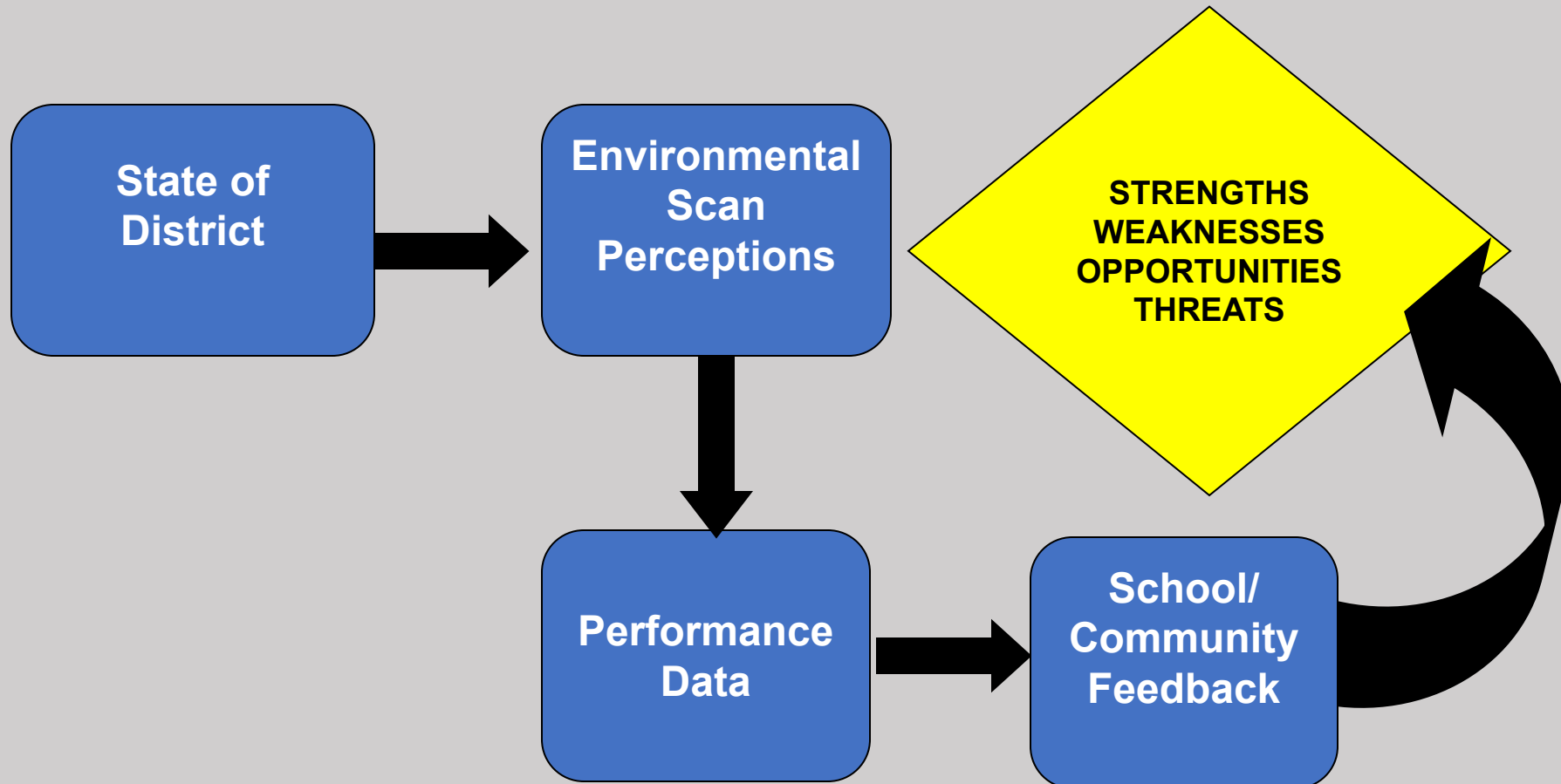
DATA

QUANTITATIVE & QUALITATIVE



DATA
LEADS TO
INSIGHT
LEADS TO
RESULTS

Determine the current state of the district – **Where are we now?**



The background features a collage of various data visualization elements. At the top left, there is a bar chart with age groups: '65-69', '70-74', '75-79', and '80 or older'. To the right, another bar chart shows a distribution of values. In the center, a 3D pie chart is visible. Below it, a bar chart with teal bars shows a downward trend, with values like 8.0, 6.8, 6.2, 4.8, and 4.5. A magnifying glass is positioned over a white document in the foreground, which contains the text for the handout. A pen lies on the documents in the background.

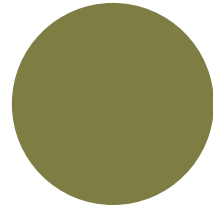
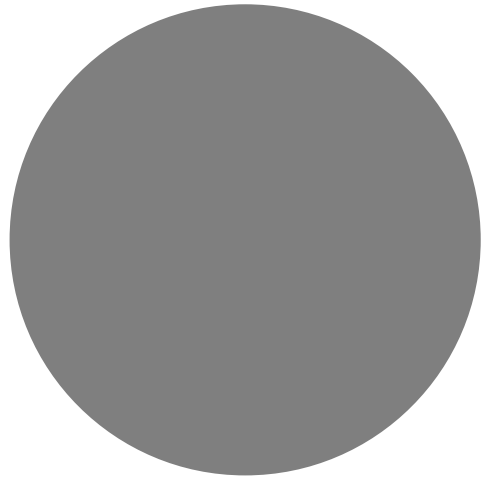
Participant Handout

Common Vocabulary
Activity Templates
Notes/Documentation
Key Content



DATA RETREAT OUTCOMES

- Review **our perceptions** of what is going well and what are our future challenges.
- Review **others' perceptions** of what is going well and what are our future challenges (Environmental Scan).
- Paint a data picture of the district to develop a shared understanding of **our performance results**. Identify from the reports **information that is trending in the right direction and information that may need attention and improvement**.
- Conduct a **SWOT analysis** to identify our strengths, weaknesses, opportunities and threats.
- Preview **NEXT STEPS** and the Vision Retreat.



“See it **big**, and keep it
simple.”

~Wilfred Peterson





**Painting a
Shared Picture
of District
Performance**

**Where are we
now!**



ACTIVITY ONE
45 minutes

Review **OUR PERCEPTIONS**
*of what is going well in the
district and what our
challenges are for the
future.*

Activity Directions: OUR PERCEPTIONS

Most Proud	Greatest Challenges

Most Proud	Greatest Challenges
<ul style="list-style-type: none">Quality StaffTechnology InitiativeStudentsDistrict ImageRigorous CurriculumSafetyFinancial StewardshipSupportive Families	<ul style="list-style-type: none">K-12 AlignmentStudent OwnershipStaff CollaborationCommunication Internal ExternalFacility RenovationStaff AccountabilityFocused Direction

Most Proud	Greatest Challenges
<ul style="list-style-type: none">Quality StaffTechnology InitiativeStudentsDistrict ImageRigorous CurriculumSafetyFinancial StewardshipSupportive Families	<ul style="list-style-type: none">K-12 AlignmentStudent OwnershipStaff CollaborationCommunication Internal ExternalFacility RenovationStaff AccountabilityFocused Direction

Table Team's Perceptions

Most Proud About

Greatest Challenges Ahead

1. Individually identify 3-4 Points of Pride and 3-4 Challenges.
2. Start with Points of Pride/Strengths.
3. One person put sticky note on chart.
4. Others put sticky notes on top if they are the same, mean the same
5. Continue until all sticky notes are complete.
6. Move to Challenges/ Opportunities for Improvement
7. One person put sticky note on chart.
8. Others put sticky notes on top if they are the same, mean the same
9. Reduce Points of Pride/Strengths to 10
10. Reduce Challenges/Opportunities for Improvement to 10

Be ready to share your chart with other Table Teams

A group of people are gathered around a yellow table, engaged in a collaborative activity. They are looking at and writing on various documents and papers. One person in the foreground is pointing at a document with a red pen. A water bottle and a calculator are also visible on the table. The scene is dimly lit, with the text overlaid on the image.

ACTIVITY TWO
45 minutes

Review **OTHERS' PERCEPTIONS**
of what is going well in the
district and what our
challenges are for the future.



Environmental Scan Data and Information





Environmental Scan 5Essentials Survey

- Student Surveys
- Staff Surveys

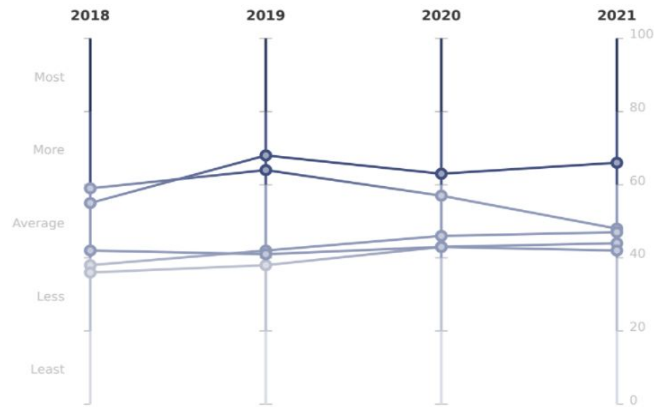
Overall, Berkeley SD 87 are moderately organized for improvement on average.



- Most Implementation
- More Implementation
- Average Implementation
- Less Implementation
- Least Implementation
- No Data
- Low Response/Not Applicable

The 5Essentials

How is Berkeley SD 87 performing on each of the 5Essentials in 2021?



Essentials	Performance Across Years				
	2018	2019	2020	2021	
Supportive Environment	55	68	63	66	More
Ambitious Instruction	59	64	57	48	Average
Effective Leaders	38	42	46	47	Average
Collaborative Teachers	36	38	43	44	Average
Involved Families	42	41	43	42	Average

Analysis of District 5E Data

Participation Rates

Student:
Teacher:
Parent:

Strengths Scores 65 or Above More or Most	Opportunities. Scores 50 or below Less, Least
5Essentials	
70 Supportive Environment	
Essential Measures	
87 Peer Support for Academic Work S	19 Quality of Student Discussion S
Supplemental Measures	
95 Socialization of New Teachers T	12 Student Responsibility S



Berkeley District 87
System Assessment Report
Conducted by the **Consortium for Educational Change (CEC)**

Assessing where your District is now on its continuous improvement journey



It is good to have an end to journey toward; but it is the journey that matters in the end.

Ursula K. LeGuin 1999

SUMMARY OF OVERALL DISTRICT STRENGTHS

Among all of the strengths within each category, the CEC Assessment Team finds these strengths to be highest in priority. It is hoped that recognizing and celebrating these strengths will showcase past investment of resources in improving performance results.

Focus on Learning - Strengths:

- The implementation of the iReady curriculum has created alignment in instruction and assessment in math.
- Work in Curriculum and Instruction is moving forward in a deliberate and thoughtful way. A description of work is outlined in the *Curricular Guidepost* document that encompasses a 3-4 year time period.
- Social-emotional learning needs are given attention through morning meetings, advisory, and classroom lessons supported in some schools by the counselors.
- The on-going 1:1 initiative provides every student with a device.
- A referendum was successfully passed which allowed for new construction at MacArthur and Sunnyside and major renovations at Riley and Northlake.
- District administrators see what the district can be. They can openly identify the areas that need improvement and work to correct these areas using the resources they have or resources they can obtain.

SUMMARY OF OVERALL DISTRICT OPPORTUNITIES

Among all of the opportunities for improvement within each category, the CEC Assessment Team finds these opportunities to be highest in priority. It is hoped that addressing these opportunities will yield a high future return on investment of resources in improving overall system performance results.

Focus on Learning - Opportunities for Improvement:

- High Turnover in Staff and Administration - This is an area that can negatively affect all focus areas.
 - The district invests time and money to teach new staff members about the district and school culture, methods, and priorities. The teacher then often leaves after a short time in the district to go to another district that pays more. Other districts benefit from the experiences and training District 87 has given them while D87 is the training ground.
 - Initiatives are started but then discontinued when a new administrator brings in a different priority.
- Teachers resist the district's push to go deeper into the standards when they have so many students performing below grade level. They believe the best way to promote student growth is to go back to previous grade level standards during instructional time.
- Teachers don't feel their students are able to demonstrate proficiency in math due to what they see as unrealistic pacing guides.
- Science and Social Studies are expected to be embedded into the literacy block in the primary and intermediate grades. However, teachers are still looking for lessons and units that were created in the past. Many of them would like to see these subjects given more priority in the day rather than be a part of literacy time.
- It can be challenging to provide on-going, embedded Professional Development, especially when there are substitute shortages. An emphasis is placed on PD when new programs are rolled out, but then it drops off and is not provided to teachers who are new to the district.
- There is no clear MTSS structure in place to identify students and provide services to them in a timely manner but the district is in the process of developing a MTSS guidebook.

Analysis of District 5E Data

Participation Rates

Student:
Teacher:
Parent:

Strengths Scores 65 or Above More or Most	Opportunities. Scores 50 or below Less, Least
5Essentials	
70 Supportive Environment	
Essential Measures	
87 Peer Support for Academic Work S	19 Quality of Student Discussion S
Supplemental. Measures	
95 Socialization of New Teachers T	12 Student Responsibility S

Activity Two: Others 'Perceptions Analysis of District 5E Data

TOP THREE LEARNING STRENGTHS	TOP THREE LEARNING OPPORTUNITIES
TOP THREE COLLABORATION STRENGTHS	TOP THREE COLLABORATION OPPORTUNITIES
TOP THREE RESULTS STRENGTHS	TOP THREE RESULTS OPPORTUNITIES

Activity Three:

135 minutes

THREE 45-minute
sessions

- *Paint a data picture that describes the current **District Performance** as to what is going well and what are the challenges ahead.*
- Introduction of Report Presenters:
 - ✓ **Student Growth and Achievement**
 - ✓ **Culture: Learning and Teaching Environment**
 - ✓ **Resources: Finance, Facilities, Technology**

Student Growth & Achievement



Trend, Cohort, Comparative, Demographic, Growth
*. . . Is it a **STRENGTH**? Is it a **CHALLENGE**?*

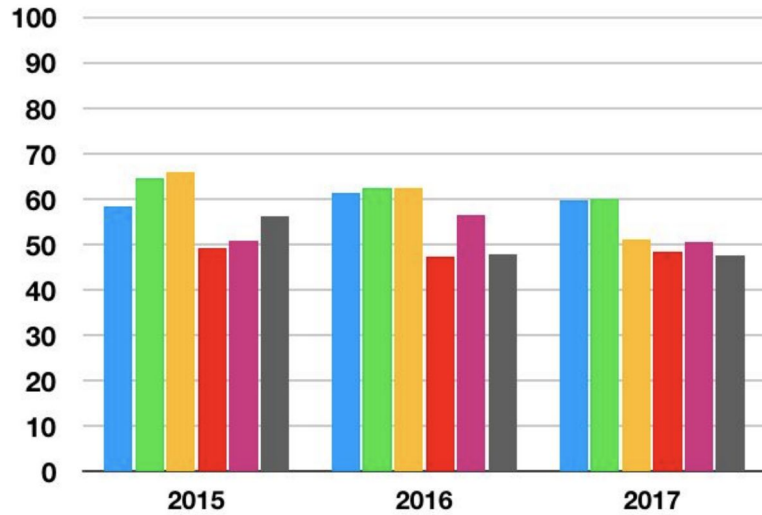


READING Growth Trends

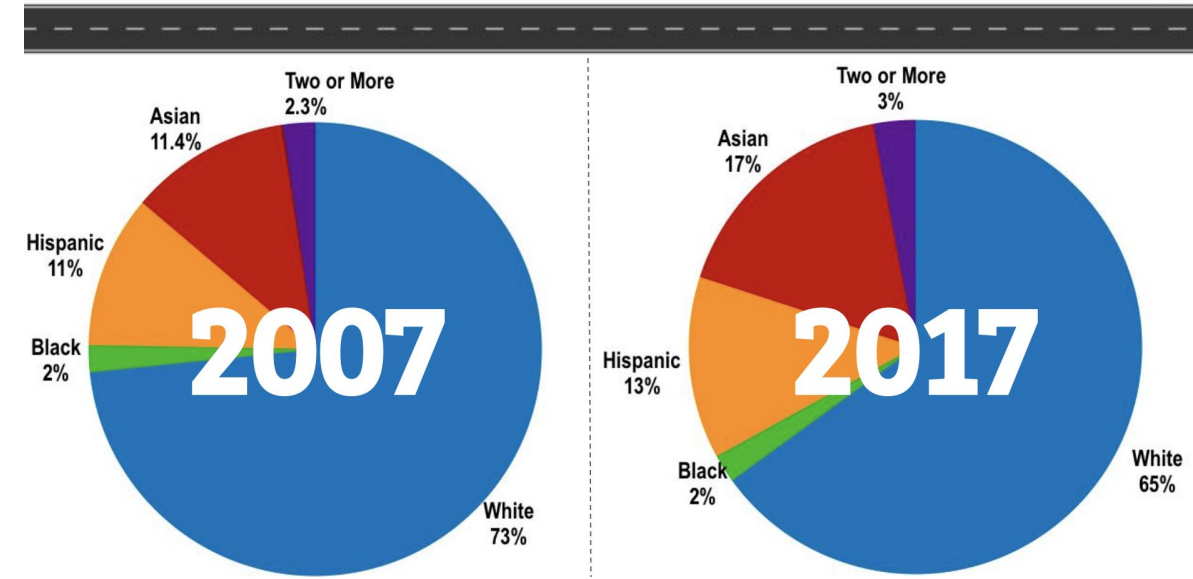
% of all students meeting their individual growth targets



- 3rd Grade
- 4th Grade
- 5th Grade
- 6th Grade
- 7th Grade
- 8th Grade



Student Diversity

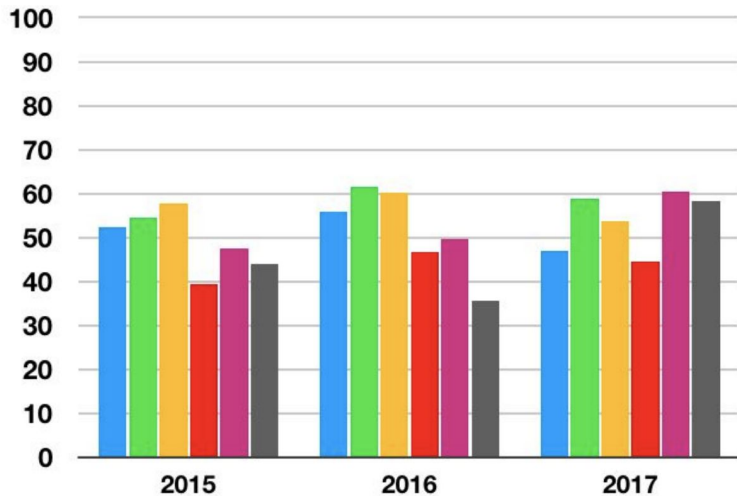


MATH Growth Trends

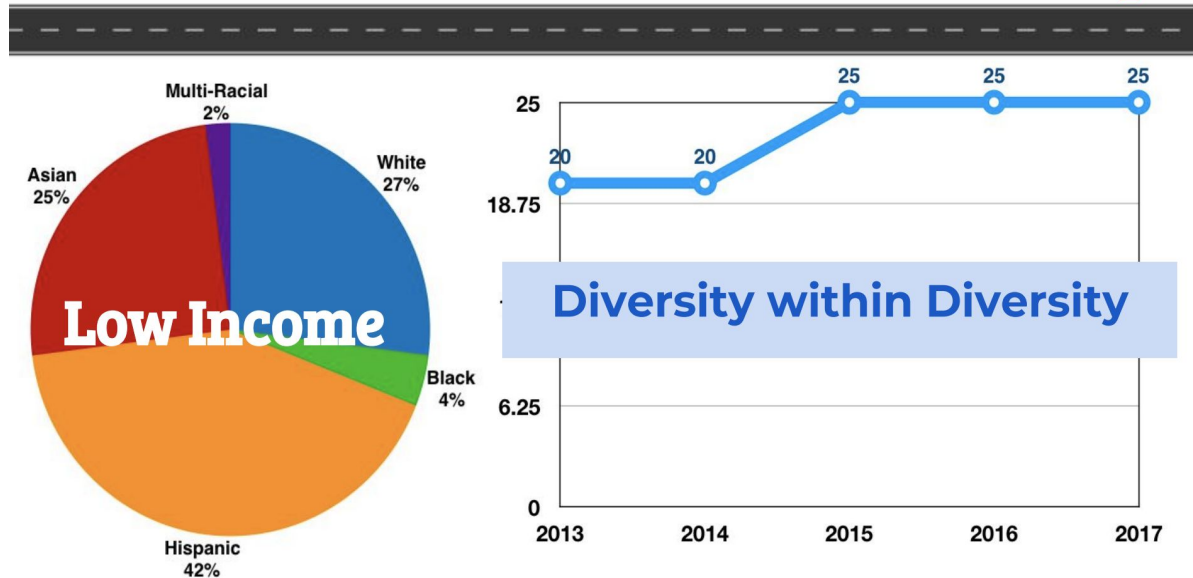
% of all students meeting their individual growth targets



- 3rd Grade
- 4th Grade
- 5th Grade
- 6th Grade
- 7th Grade
- 8th Grade



Student Groups



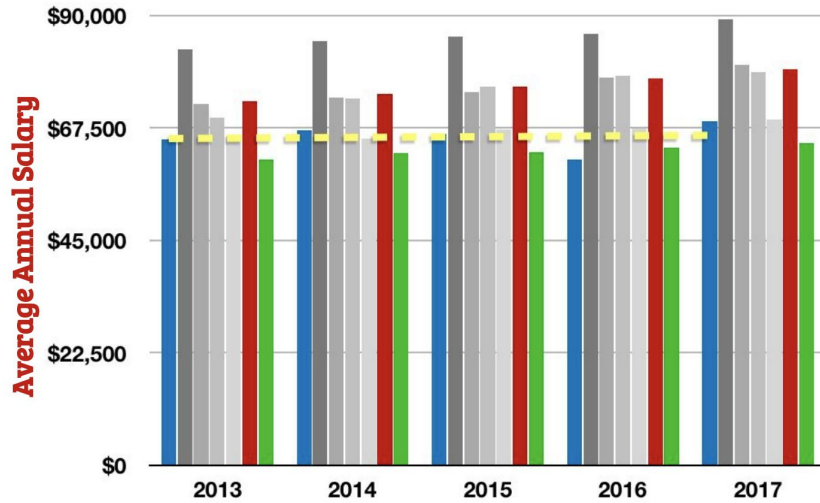
CULTURE: Learning and Work Environment



Trend, Cohort, Comparative, Demographic, Growth
*. . . Is it a **STRENGTH**? Is it a **CHALLENGE**?*

Staff Salary Comparison

- Glenview D34
- Feeder #1
- Feeder #2
- Feeder #3
- Feeder #4
- Feeder Average
- State Average



Focus on Collaboration

Strengths

Dedication **Pride** **Structures** **Processes** **Trust**

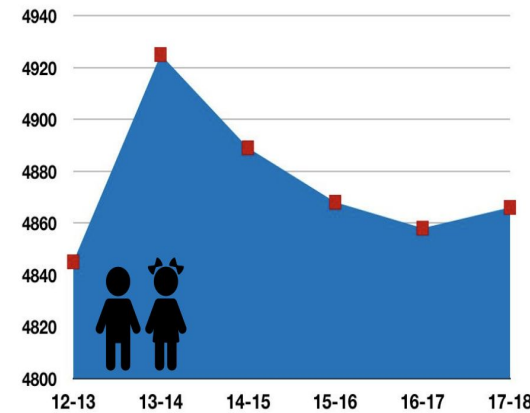
Focus on Collaboration

Challenges

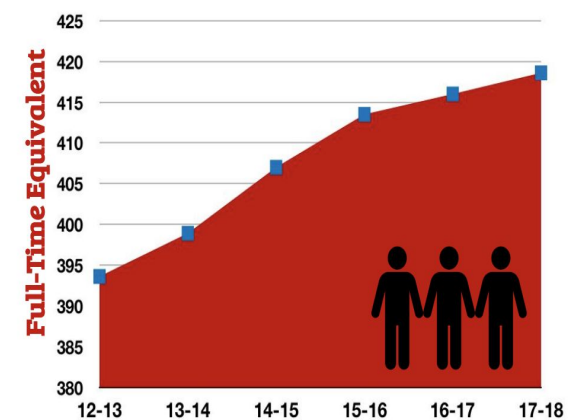
Morale **Misalignment** **Inflexible** **Inconsistent** **Standards**

Student & Staff Populations

Students



Staff



RESOURCES: Finance, Facilities & Technology



Trend, Cohort, Comparative, Demographic, Growth
*. . . Is it a **STRENGTH**? Is it a **CHALLENGE**?*

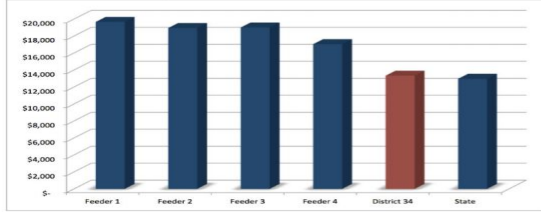
Financial Health

District 34 received:

- The top financial profile rating of 4 (Recognition) for the last 5 years
- The top bond rating from Moody's of **Aaa**

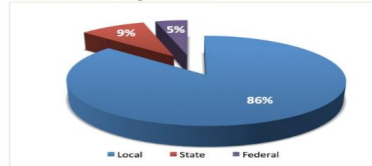
Expenses:

District 34 spends **\$5,330 less** than the average of the other feeder districts and \$366 more than the state average.

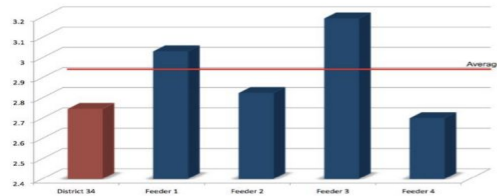


Revenues:

12% of local revenue comes from the GLEN TIF - Make Whole Payment

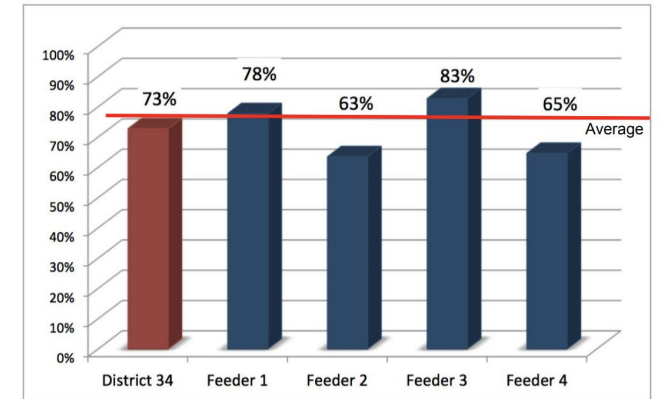


Tax Rate:



District Financial Health

FY17 Operating Fund Balance



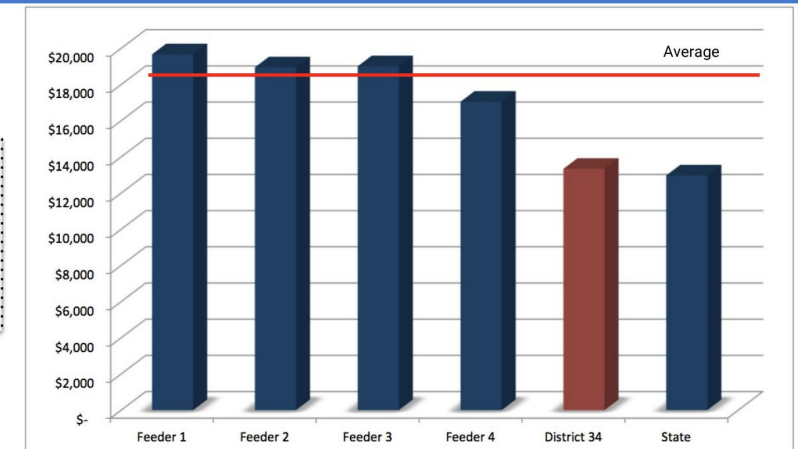
*District 34 received the top financial profile rating of 4 (Recognition) for the last 5 consecutive years

*District 34 received the top bond rating from Moody's of **Aaa**

Financial Profile Score

Category	Score
Fund Balance to Revenue Ratio - Reflects the overall financial strength.	4
Expenditures to Revenue Ratio - Identifies how much is expended for each dollar received.	4
Days Cash on Hand - Provides a projected estimate of the number of days operating expenditures could be net provided no additional revenues were received.	4
Percent of Short-Term Borrowing Maximum Remaining - Short-term debt is incurred due to several factors (i.e., delays in receipt of local revenues, etc.).	4
Percent of Long-Term Debt Margin Remaining - Long-term debt is incurred for major expenditures, such as building and equipment.	4

FY17 Operating Expense Per Pupil



District 34 spends \$5,330 less than the average of the other feeder districts and \$366 more than the state average.

Reflection

- *What did you learn from each report that let's you know how the DISTRICT is performing?*
- *Performing compared to others.*
- *Performing compared to the past/*
- *Which are STRENGTHS?*
- *Which are CHALLENGES?*



What did you learn about the student achievement and growth data that informs how the DISTRICT is performing? Performing compared to others? Performing compared to the past?

1.

2.

3.

4.

5.

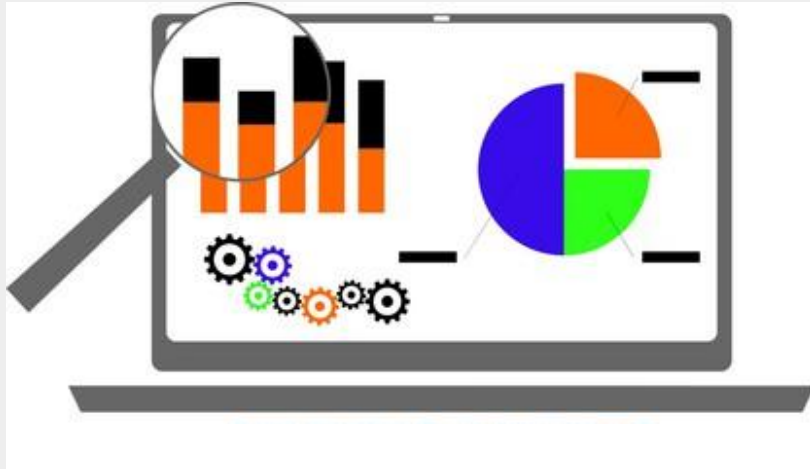
6.

7.

8.

9.

10.



Activity Directions

- *Each presentation is to be approximately 30 minutes with an additional 10 minutes for questions.*
- *Take notes on the participant handout.*
- **Thanks to the Presenters.**



Activity Three Continued: PROCESSING THE DATA PRESENTATIONS: **45 min**

- Each group will process the last of the three reports they hear,
- The presenter will be a part of the group.
- Each group will present a poster highlighting no more than the top key information trending well and the top key information needing attention of improvement.

Teams will post their findings for all to view.

Activity Three: Summary of Student Achievement Report

What is going well: Strengths/Points of Pride

What needs attention: Weaknesses/Challenges

1

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LUNCH



ACTIVITY

FOUR: 45

minutes

10 minutes Gallery
Walk

Conduct a **SWOT analysis**

- Strengths
- Weaknesses
- Opportunities
- Threats

SWOT ANALYSIS

- Strengths
- Weaknesses
- Opportunities
- Threats



- What do we consider to be our strengths?
- What advantages do we have?
- What do others say our strengths are?

- 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?

STRENGTHS

WEAKNESSES

OPPORTUNITIES

THREATS

- 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?

- Who or what threatens us the most?
- What challenges are coming that we must respond to?
- What might block our progress?

SWOT ANALYSIS EXAMPLE

STRENGTHS: What are we most proud of? What do we consider to be our results of our best work? What advantages do we have? What do others say about us in positive ways?

- Dedicated, caring, and invested staff and administration
- High quality academic program
- Strong financial management; balanced budgets
- Bond rating, and state financial profile rating
- Community and family involvement
- Perceptions of the district
- Technology devices, access, and infrastructure
- Whole child philosophy
- Value and appreciation for diversity
- Safe schools with nurturing learning environments
- Fine Arts and Physical Education programs

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?

- Student performance above state average, but below community expectations
- Achievement gaps
- Differentiated instruction with impactful interventions and enrichments and supports to meet academic and social and emotional needs of all students
- Consistencies in practices school-to-school, classroom-to-classroom
- Homework and grading practices with a positive impact on student learning
- Competitive salaries and benefits to attract and retain high quality staff
- Variability in class sizes, admin to student and admin to staff ratios
- Aging facilities with deferred maintenance
- Meaningful technology integration with teaching and learning
- Limited and inconsistent opportunities for student voice, choice, collaboration, and empowerment
- Managing & responding to student stress & anxiety

OPPORTUNITIES: 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.

- Collaborate with high school district to develop a pathway to new college, career & life readiness expectations
- Reimagine definition of student success
- System for data collection, use, analysis & management
- Additional social and emotional supports and implementation
- Early learning & full-day kindergarten options to ensure improved readiness for school
- Instructional tools and strategies to provide clarity and consistency expectations for family engagement
- New opportunities to energize & support initiatives and change management through professional learning
- Exploring options to make better use of time & space
- Offer global language in younger grades
- Higher quality bilingual programs and services

THREATS: 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?

- State and federal funding
- Resistance to change; fixed mindset
- New state assessment
- Balance of ability to pay taxes with critical support to maintain a high quality educational program
- Economic disparity and equity throughout the district
- Health, wellness, stress, anxieties for students and their families
- Social media
- Safety and security

Activity Directions:

- **Examine what you learned today:**

- Your perceptions of Strengths and Opportunities for improvement
- Others' perceptions of Strengths and Opportunities for improvement
- Data and information from the Four Reports that are strengths, weaknesses, opportunities or threats
- Impact findings that present opportunities or threats



Activity Directions:

- *Brainstorm with your table strengths, weaknesses, opportunities and threats.*
- **Copy your list to the SWOT chart and post the chart to share with the whole strategic plan team.**



Sharing SWOT **Strengths**

Sharing SWOT **Weaknesses**

Sharing SWOT **Opportunities**

Sharing SWOT **Threats**

NEXT STEPS

- Data Retreat Findings.
- All Data Retreat resources on website.
- SWOT Analysis
- Community Engagement
- Encourage feedback participation
- Leave name table tents and supplies
- **READY OURSELVES FOR THE VISION RETREAT**



Community Engagement Opportunities

Survey

Examine each quadrant

- Did we get it right?
- What did we miss?
- What did we get wrong?
- Other advice to the plan team



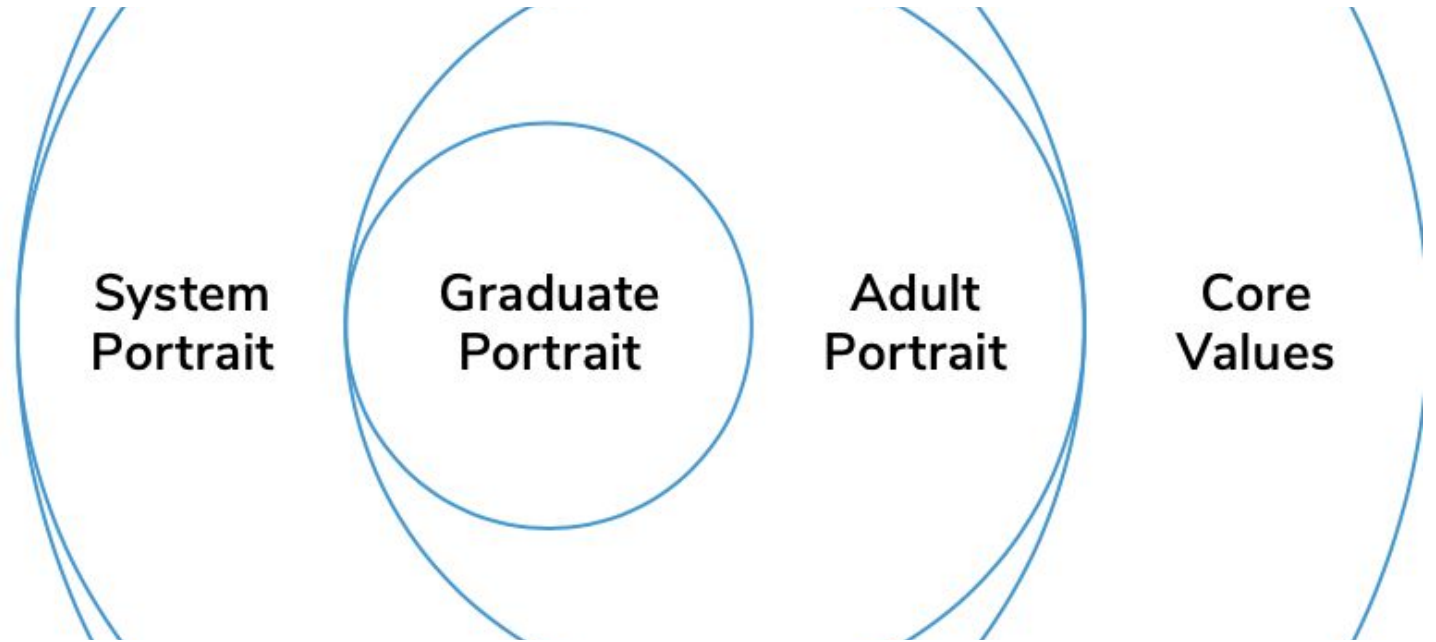
Vision Retreat: Where do we want to be?
To envision a future that moves individuals, the school, and the district to a higher level of satisfaction and performance.
In person 6-hour session



"If schools are not imagining a different future, they will amplify their efforts to do what they have always done."

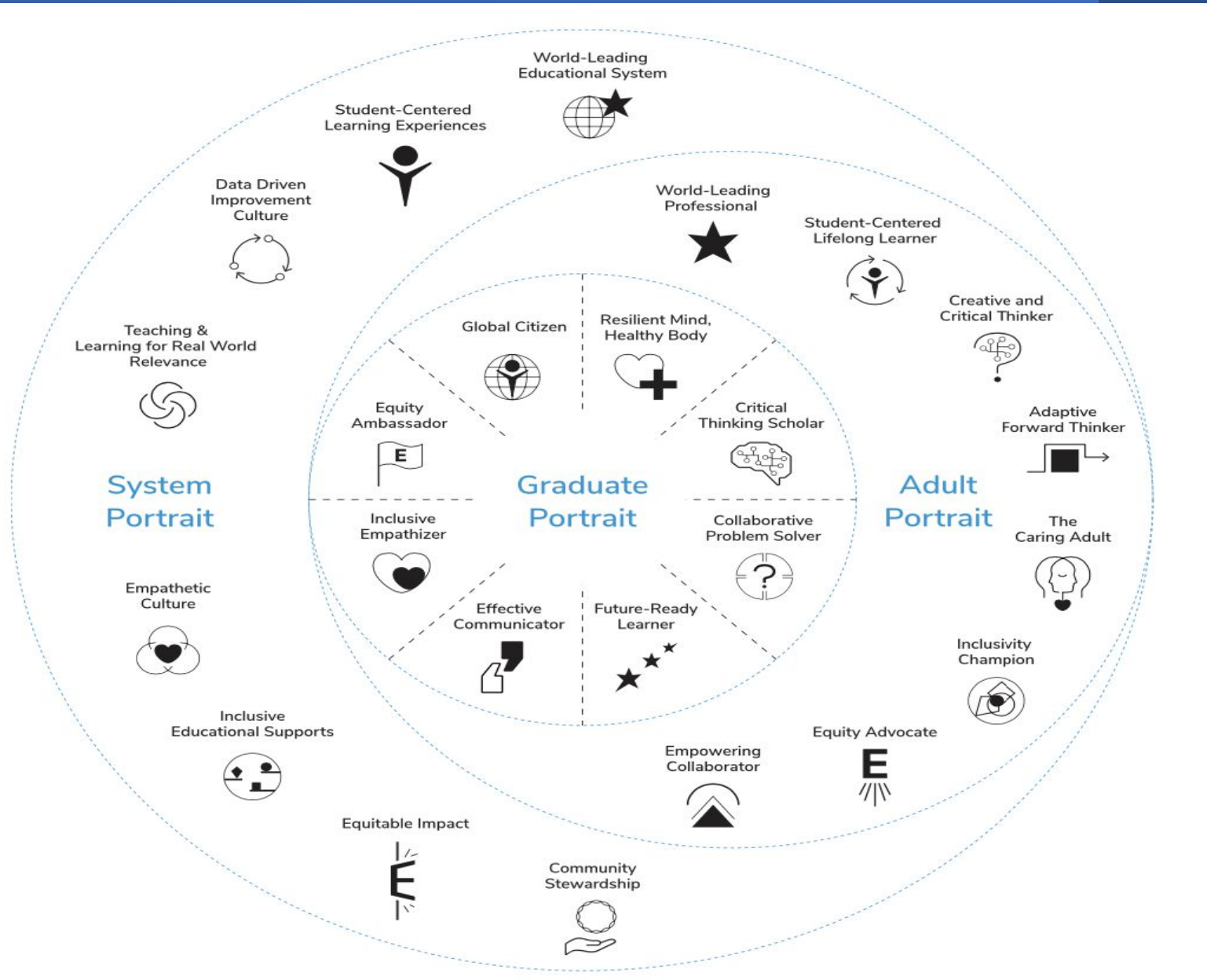
-Grant Lichtman, #EdJourney: A Roadmap to the Future of Education



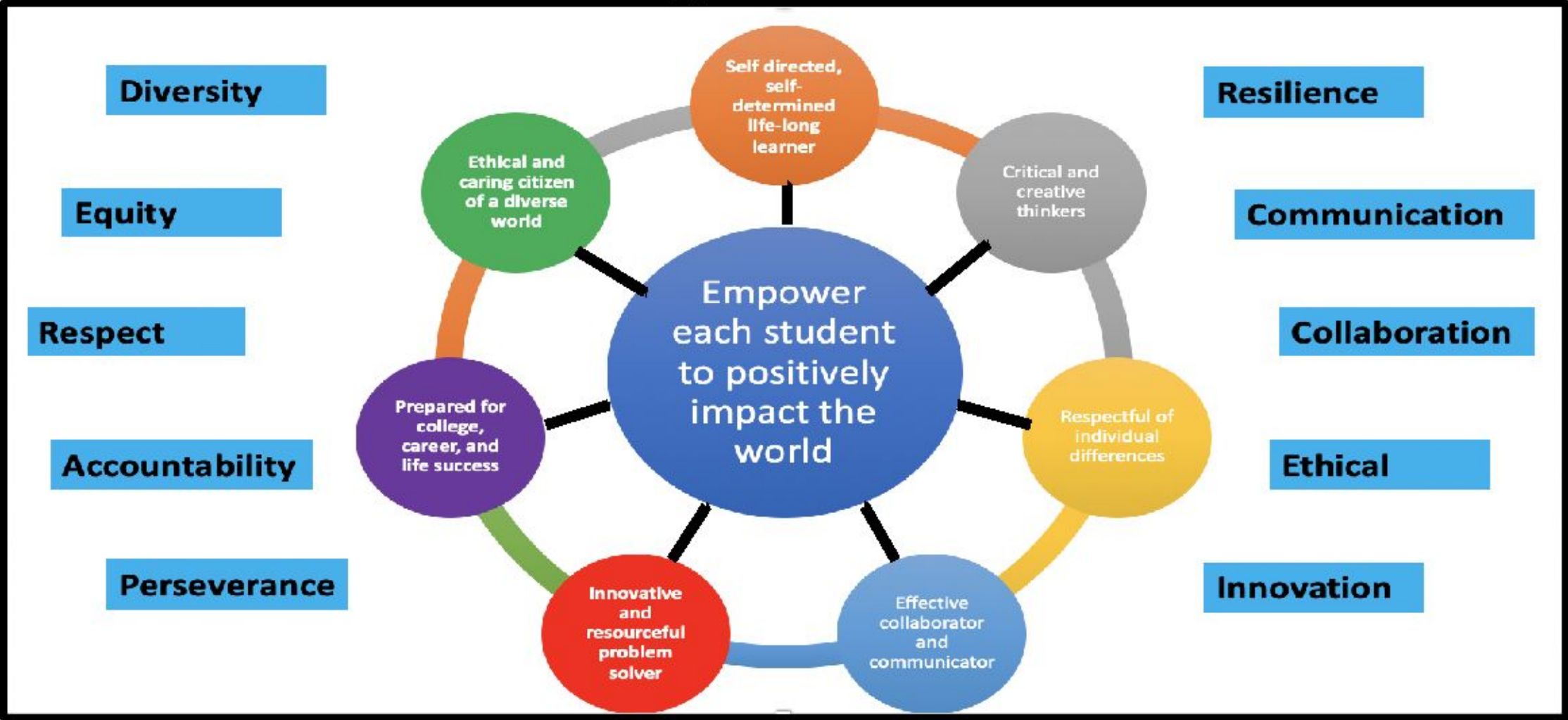


Vision 2030

Thanks to the Santa Clara Unified School District and their Vision 2035 process



District Strategic Plan 2019-2024



OUR VALUES

WHAT WE STAND FOR

OUR MISSION & VISION

WHY WE EXIST and WHERE WE ARE HEADED

OUR VALUES

WHAT WE STAND FOR



Thanks to the
Strategic Plan
Team