

## A scaffolded approach to drafting or critiquing a strategic direction (including the milestoning for a process)

Workshop slides

In this workshop, we go through a scaffolded process for drafting and refining parts of your school plan.

The activities in the workshop allow you to:

- understand how the development of a school plan is an iterative process connected to and dependent on all the components
- draft or critique a strategic direction (5Ps, improvement measures and annual milestones)
- draft or critique the 2018 milestones for one process within that strategic direction
- understand the planning process and feel confident to continue it.

The activities follow a set of colour-coded steps that connect up different parts of the plan.

This approach:

- supports the [School Excellence Implementation Guidelines – School Planning](#) (‘the Guidelines’), which is the one source of truth for school planning
- is just one way that a school might choose to go about constructing its plan
- lends itself to a collaborative workshop environment
- highlights the prominence of evaluative thinking in the school planning process
- is an iterative and fluid process that allows you to come back and refine aspects of your earlier thinking at any point
- has been developed as part of an ongoing partnership between Principals School Leadership, High Performance and the Evaluation Capacity Building team to support schools in a consistent, transparent way.

## UNPACKING THE DAY

The development of a school plan is an iterative process connected to and dependent on all the components.



The activities in this workshop start at the point where your school has:

- engaged in self-assessment using the School Excellence Framework (SEFv2)
- consulted with your school community
- identified the school's vision, background and possible strategic directions for 2018-20.

### Activities relating to the 5Ps

- Activity 1 – Writing a strategic direction statement (slide 3)
- Activity 2 – Writing a purpose statement (slide 4)
- Activity 3 – Writing improvement measures (slide 5)
- Activity 4 – Writing practice and product statements (slide 6)
- Activity 5 – Writing people statements (slide 7)
- Activity 6 – Determining processes (slide 8)

### Activities relating to milestone

- Activity 7 – Setting annual milestones (slides 9-12)
- Activity 8 – 2018 Milestones: Activities and resources (slide 13)
- Activity 9 – 2018 Milestones: Evaluation (slide 14-15)

### Other parts of the published plan

- Activity 10 – Evaluation Plan (slide 16)

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**Strategic direction**

- What is the area you want to improve?
- A short, meaningful statement that articulates the transformation to be achieved.
  - Enables the whole school community to share in the school's purpose.



**Purpose**

- What are our reasons for focusing on this strategic direction?
- An aspirational statement that is also measurable and contextual
  - Relates directly to the school vision, drives the whole plan
  - Self-evident and succinct (25-50 words)

**Improvement measures**

- What will be achieved in three years as a result of the School Plan?
- 2-3 high level statements against which the impact of the processes will be monitored and evaluated

- Improvement measures must:
- be measurable
  - reflect the outcomes intended by the purpose statement
  - relate to the specific strategic direction.

**Activity 1 – Writing a strategic direction statement (see p7 of the Guidelines)**

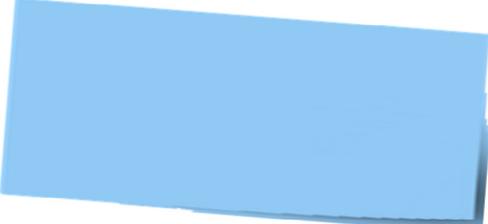
What is your high level driver of transformational change? Strategic directions are high level statements, based on self-assessment and consultation, which encapsulate the school plan and drive improvement for the next three years and into the future.

Write a strategic direction statement on a small blue sticky note and place it in the *Strategic direction* box on the blue A3 sheet.

Check:

- Is your strategic direction connected to your self-assessment, community consultation and school context?
- Does the statement clearly articulate the transformation to be achieved?

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<p><b>Strategic direction</b></p> <p>What is the area you want to improve?</p> <ul style="list-style-type: none"><li>• A short, meaningful statement that articulates the transformation to be achieved.</li><li>• Enables the whole school community to share in the school's purpose.</li></ul> 	<p><b>Purpose</b></p> <p>What are our reasons for focusing on this strategic direction?</p> <ul style="list-style-type: none"><li>• An aspirational statement that is also measurable and contextual</li><li>• Relates directly to the school vision, drives the whole plan</li><li>• Self-evident and succinct (25-50 words)</li></ul> 
<p><b>Improvement measures</b></p> <p>What will be achieved in three years as a result of the School Plan?</p> <ul style="list-style-type: none"><li>• 2-3 high level statements against which the impact of the processes will be monitored and evaluated</li></ul> <p>Improvement measures must:</p> <ul style="list-style-type: none"><li>• be measurable</li><li>• reflect the outcomes intended by the purpose statement</li><li>• relate to the specific strategic direction.</li></ul>	

**Activity 2 – Writing a purpose statement** (see p7 of the Guidelines)

What are your reasons for focusing on this strategic direction? Write a purpose statement that explains why this strategic direction was chosen as a focus and what you aim to achieve. The purpose statement needs to be self-evident and succinct (25-50 words).

Write your statement on a large blue sticky note and place it in the *Purpose* box on the blue A3 sheet.

Check:

- Is the purpose clearly written?
- Does it say more than it needs to? Check that it is not too 'dense', giving you too many things to measure.
- Check that your purpose statement explains **why** this is relevant to the specific school context, rather than **how** the improvement will be put in place and measured. Those aspects are expressed in other parts of the plan.
- Does the purpose statement directly relate to the school vision through the strategic direction?

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**Strategic direction**

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**Improvement measures**

What will be achieved in three years as a result of the School Plan?

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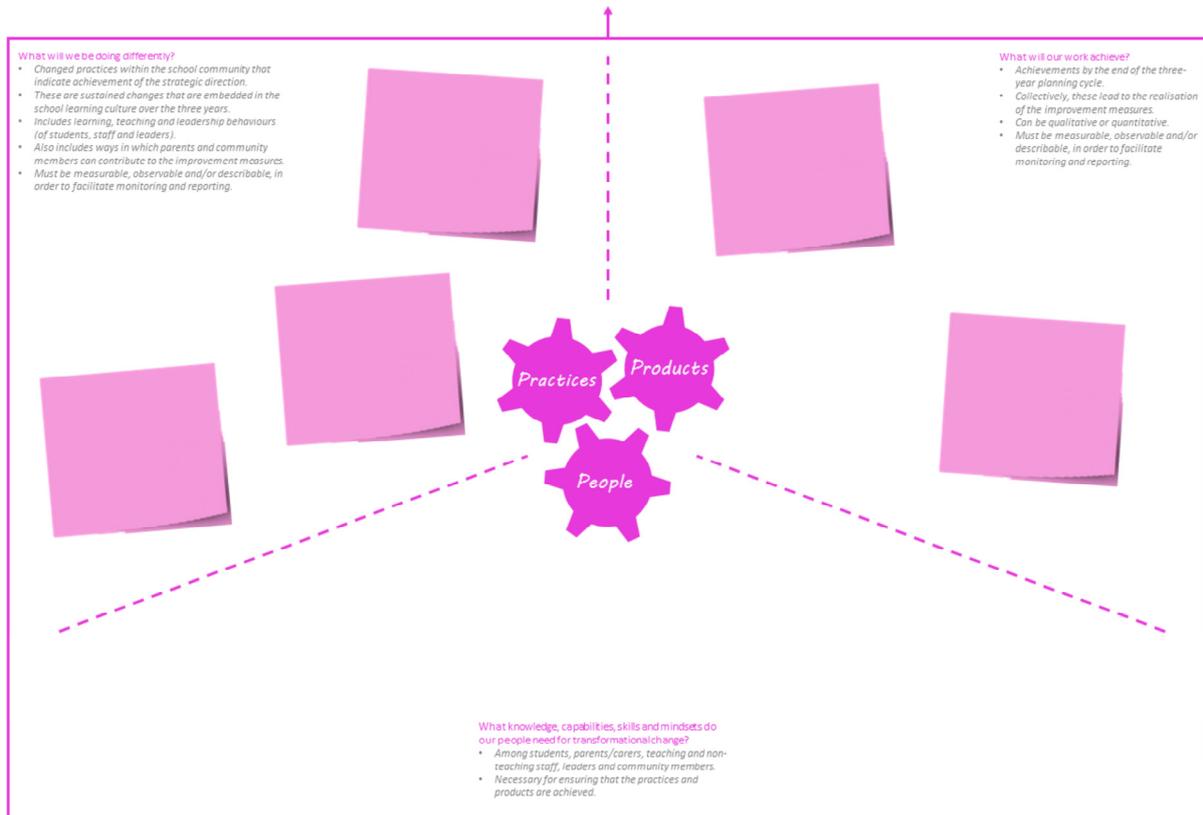
**Activity 3 – Writing improvement measures** (see p8 of the Guidelines)

What will be achieved by the end of the three-year School Plan? On small blue sticky notes, write 2-3 high level statements against which the impact of the processes will be monitored and evaluated. You will revisit and refine these throughout the day, so don't worry about getting the perfect wording at this stage. Place these sticky notes in the *Improvement measures* box on the blue A3 sheet.

Check:

- What evidence have we collected to inform our reason for this improvement measure? (baseline)
- How will we measure how much we do, how well we do it and the impact of our efforts?
- Will the measure effectively capture what we set out to improve? How will we know? (monitoring, measuring, evaluation)
- Does each improvement measure reflect the outcomes intended by the purpose statement?
- Is it realistic to achieve in three years?

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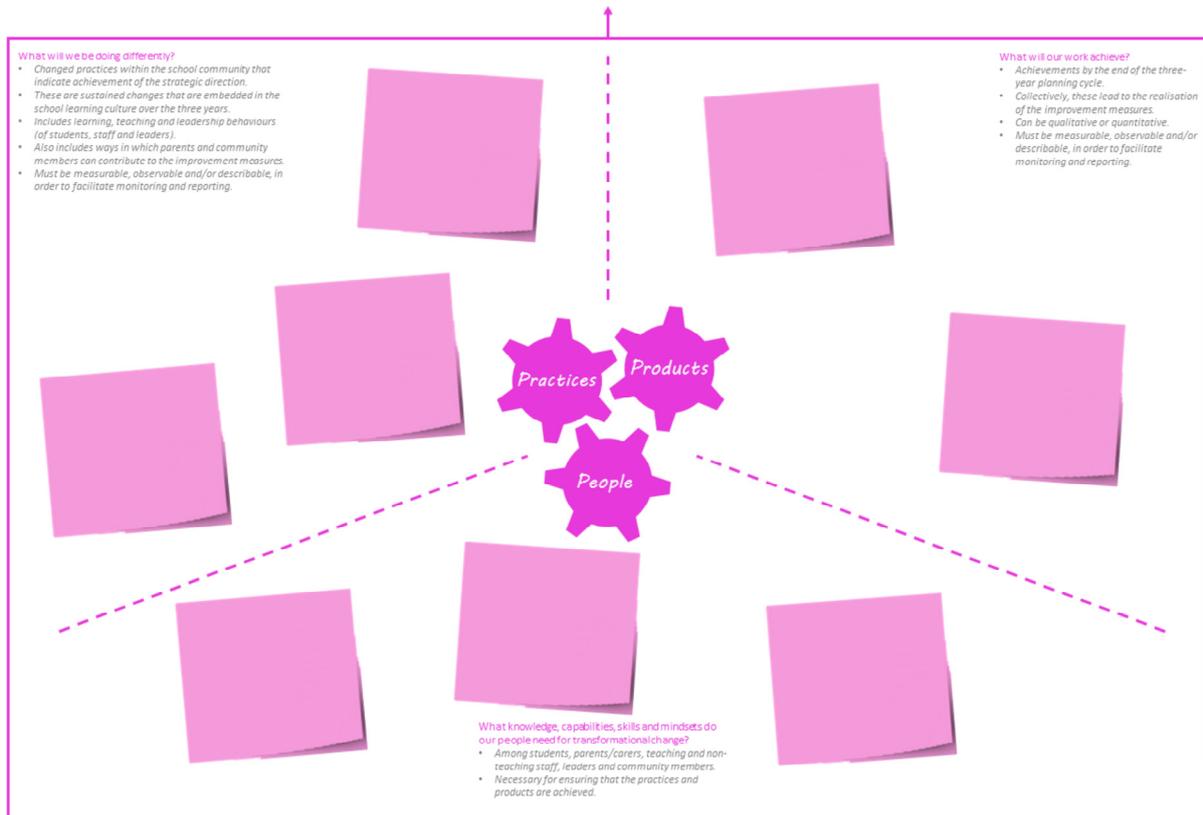
#### Activity 4 – Writing practice and product statements (see p9 of the Guidelines)

What will you do differently? What will your work achieve? Write each of your practices and products on a small pink sticky note, and place them all in the *Practices* and *Products* boxes on the pink A3 sheet.

Check:

- Do the statements describe the changes you would like to see?
- Check that the practices and products are appropriately linked to the improvement measures.
- Check that the practices and products are outcomes, rather than tasks to do.
- Are all of your practices and products necessary to achieve your improvement measures?
- If all of these occur, will that be enough to achieve the improvement measures?

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**Activity 5 – Writing people statements (see p10 of the Guidelines)**

What skills, knowledge, capabilities and mindsets do your people need for transformational change? On small pink sticky notes, write your 'people' statements for different groups of people (e.g. students, parents/carers, teaching and non-teaching staff, leaders and community members). Place these in the *People* box on the pink A3 sheet.

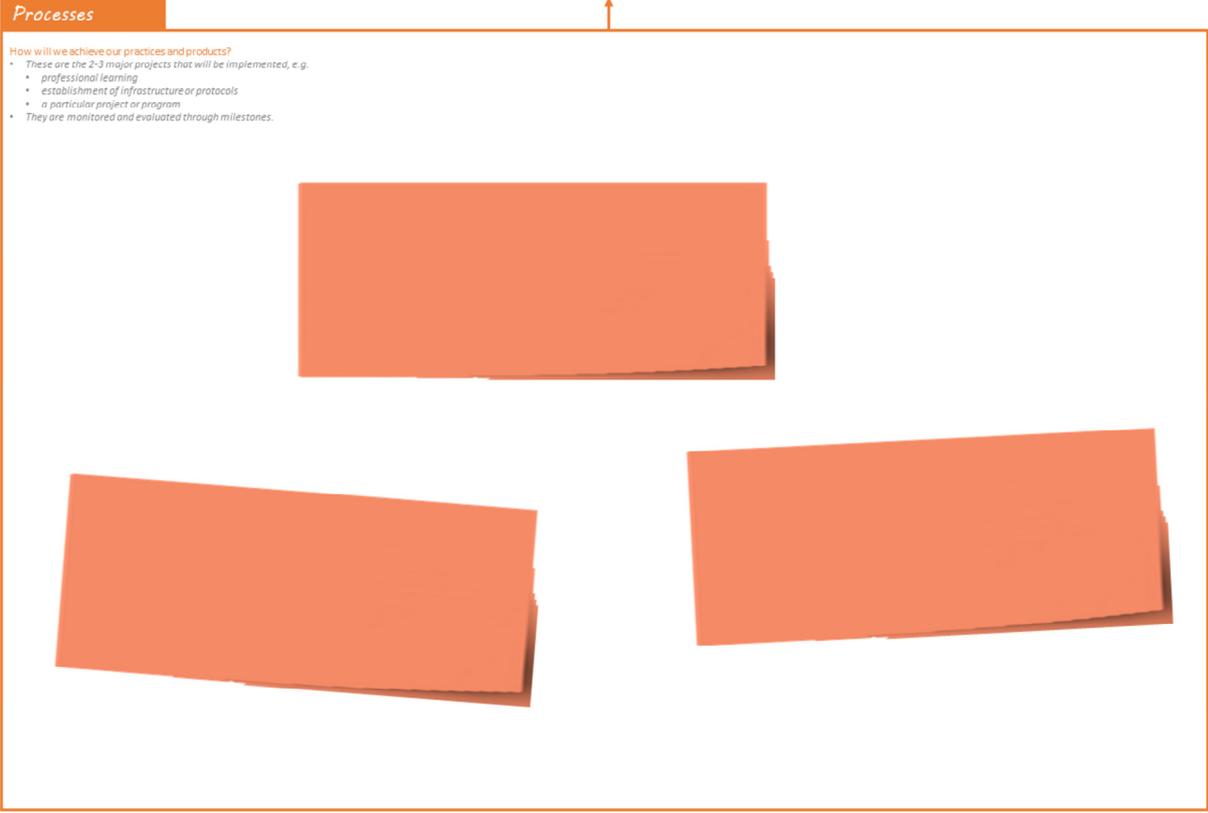
Check:

- Do these skills, knowledge, capabilities and mindsets support the transformational change you are looking for?
- Check that the skills, knowledge, capabilities and mindsets you have identified are meant to be enhanced or developed, rather than assigned tasks to implement the strategic direction.
- Are these connected to your practices and products?

**Processes**

How will we achieve our practices and products?

- These are the 2-3 major projects that will be implemented, e.g.
  - professional learning
  - establishment of infrastructure or protocols
  - a particular project or program
- They are monitored and evaluated through milestones.



### Activity 6 – Determining processes (see p10 of the Guidelines)

How will you achieve your practices and products? Write 2-3 processes, each on its own large orange sticky note. Place the sticky notes in the Processes box on the 'orange' A3 sheet.  
[Optional: Map each process to the SEFv2 and label it with the domain/element/theme that it will support. For example: Learning | Curriculum | Teaching and Learning programs.]

Check:

- Is the wording clear and concise?
- If we implement these processes fully over three years, will that deliver the purpose of the strategic direction?
- Does each process link to people, practices and products?

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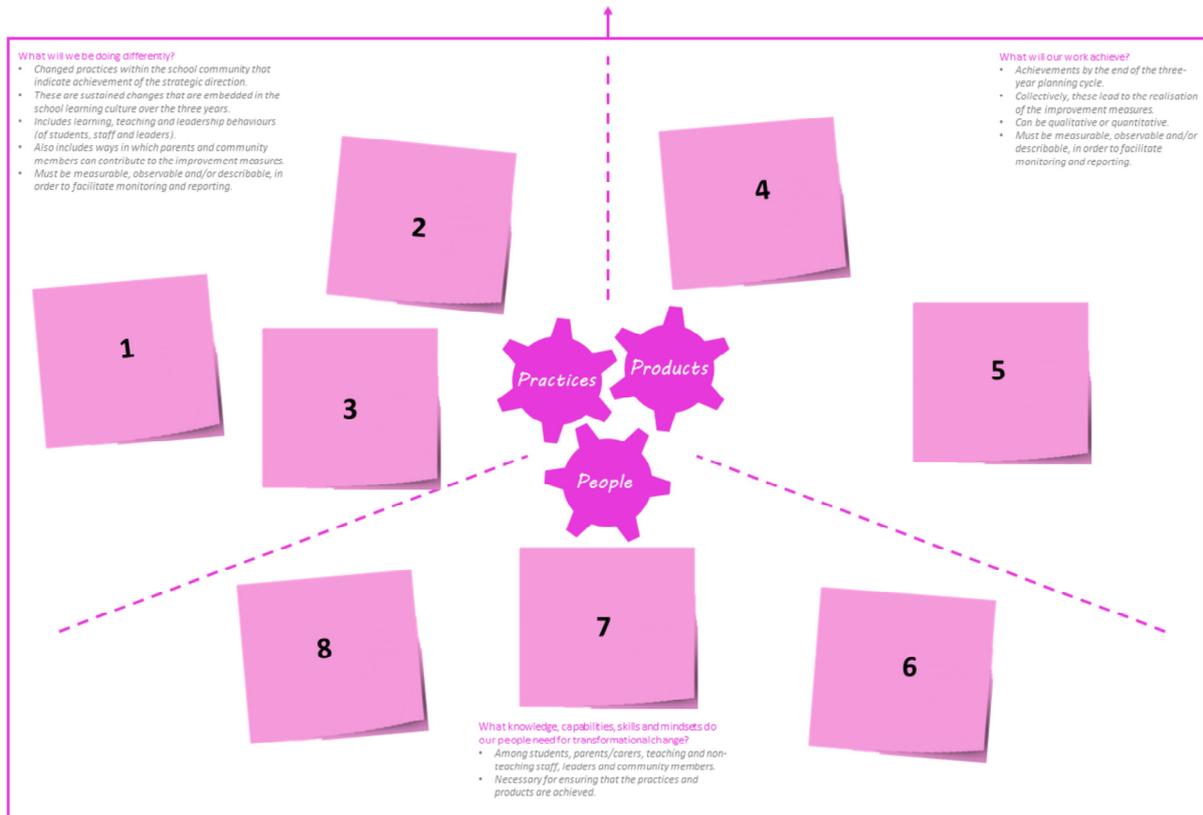
**Activity 7 – Setting annual milestones** (see p12 of the Guidelines)

Activity 7 asks you to think ahead, about all three annual milestones for each of the processes in your strategic direction. This is not in the Implementation Guidelines as a requirement of SPaRO or the published plan. However, going through this exercise will help you visualise the big-picture alignment between different parts of the plan over time.

**Setup:**

- Take your three orange process sticky notes from Activity 6 and transfer them to the orange Process/Annual milestones A3 sheet.
- Add blank yellow sticky notes above – three per process.

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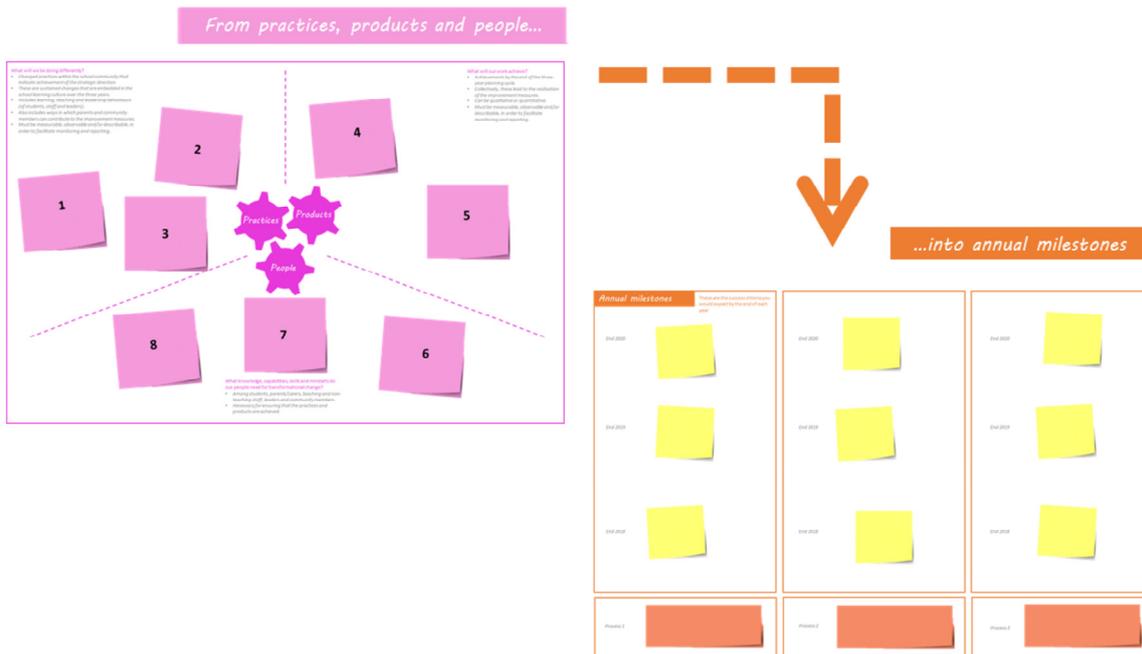


### Activity 7 (continued)

#### Setup:

- Activity 7 involves translating the 'people', 'practices' and 'products' on your pink sticky notes into annual milestones.
- You may find it helpful to develop a code on the pink sticky notes, for example numbering (as in the example above), so that you can easily keep track of all your 'people' statements, 'practices' and 'products'.

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### Activity 7 (continued)

#### Step 1:

- Look at each of your pink sticky notes (practices, products and people).
- For each pink sticky note, determine in which year it will be achieved (2018, 2019, 2020) and which of your three process(es) will drive it.
- If you have developed a code on your pink sticky notes, reference it on the relevant yellow sticky notes, in the year you think it will be achieved (see next page).
- Each pink sticky note should be accounted for, and may appear in more than one process.



### Activity 7 (continued)

#### Step 2 (Optional):

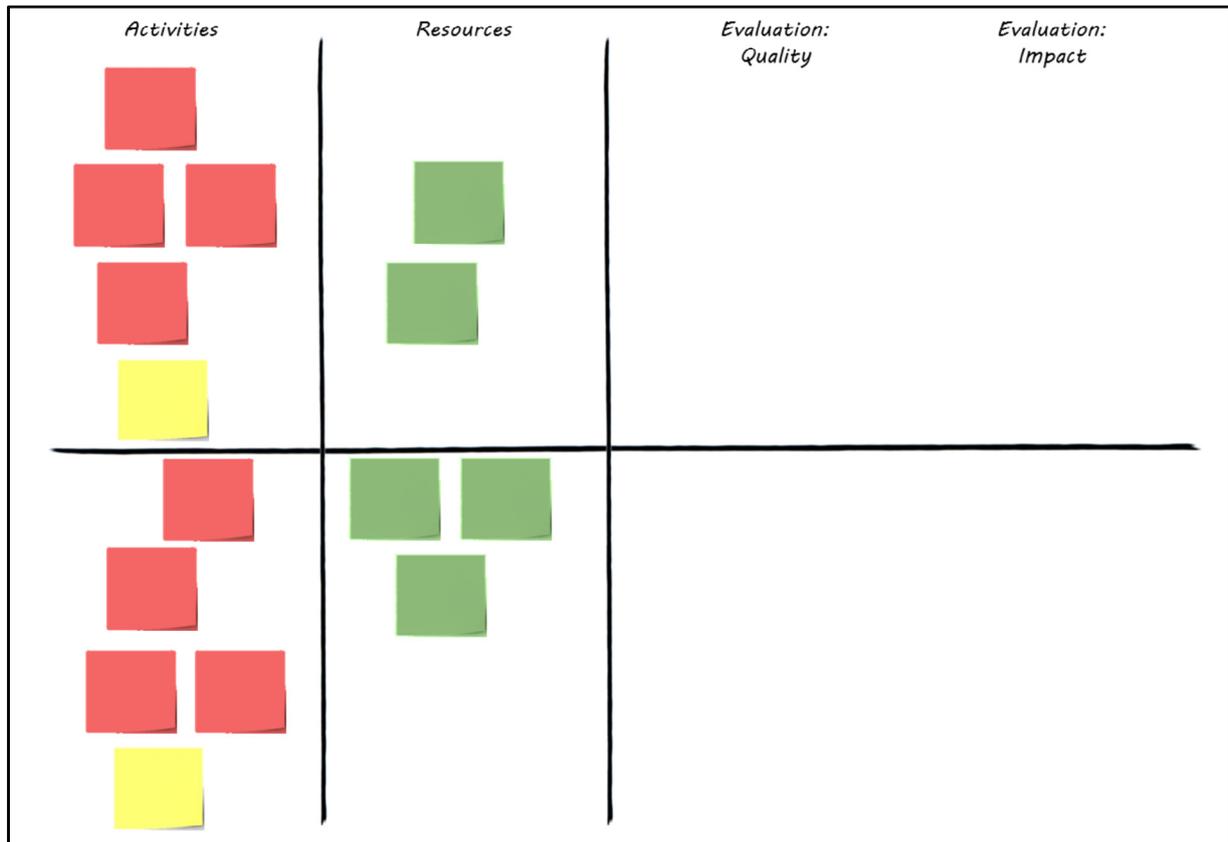
- Look back at the relevant SEF v2 descriptors you have written on your large orange process stickies.
- Add the relevant descriptors to the annual milestone sticky notes, when you would expect them to be achieved.

#### Step 3:

- Add any other success criteria you would have for years 1, 2 and 3.

#### Check:

- Would achieving all 2020 annual milestones lead to achieving your improvement measures?
- How will your processes achieve your people/practices/products?
- How do the processes relate to each other?
- Is the workload reasonable? Do you have too much change happening at once? (Keep in mind that you have 1-2 other strategic directions, each with 2-3 processes.)

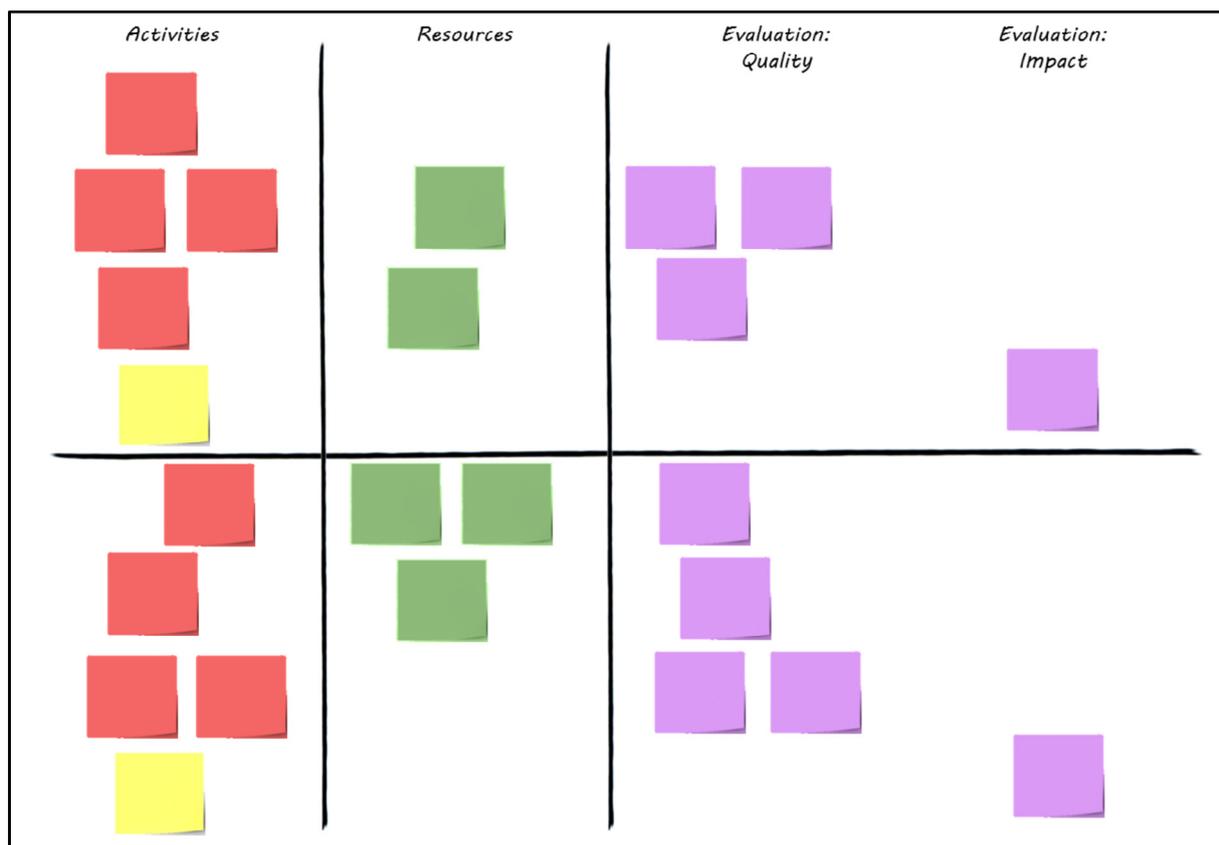


**Activity 8 – 2018 Milestones: Activities and resources** (see p13 of the Guidelines)

- Take the 2018 annual milestone for one of the processes and place it in the bottom left corner of the black and white A3 sheet.
- Add a sticky note of the same colour, half way up the page and write your mid-year reflection point on it (what would success look like at that point?).
- On red sticky notes, write your activities - what you would do to achieve your mid-year and annual milestones. Stick these in the 'Activities' column.
- On green sticky notes, note the resources you will need for the activities. Stick these in the 'Resources' column.

**Check:**

- How do your activities help you achieve your mid-year and annual milestones?
- Are your resources adequate to support your activities?
- Are the activities and resources chosen informed by research and evidence?



### Activity 9 – 2018 Milestones: Evaluation (see p14 of the Guidelines)

There are four main questions to ask in the monitoring and evaluation of a process:

- What did we do? (Evidence of action)
- How well did we do it? (Quality of action)
- What happened as a result? (Evidence of impact)
- What adjustments need to be made to our future milestones?

Activity monitoring is taken care of in the 'traffic lights' in SPaRO (see p13 of the Guidelines).  
Activity 9 relates only to the evaluation column.

**In the Evaluation: Quality column** – On purple sticky notes, write a 'what' and a 'how':

- the indicator of quality you are looking for (what)
- the data source/s you can use to use to check the quality of the activities (how).

Place each purple note on the same row as the red 'activity' sticky note it relates to.

**In the Evaluation: Impact column** – On purple sticky notes, write a 'what' and a 'how':

- the indicator of impact you are looking for (what)
- the data source/s you are going to use to check the impact (how).

Place each purple note on the same row as the activity, mid-year or annual milestone it relates to.

Check:

- Are the chosen quality indicators appropriate to assess the quality of the activities?
- Will the chosen impact indicators be appropriate to assess the impact of the process?
- Have you chosen the relevant data sources?

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At this point, and throughout the development of your school plan, it is helpful to revisit your improvement measures.

Check:

- Do they still reflect the impact that you intend to make?
- Do they still relate to your purpose/people/practices/products and your annual milestones (especially your 2020 milestones)?
- Do they seem achievable in three years (not too hard or too easy)?

## EVALUATION PLAN

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- The evaluation plan is part of your published school plan, for each strategic direction.
- The plan is a list of broad strategies and sources of evidence you will use to monitor progress towards achieving improvement measures.
- Implementation of the evaluation plan is through ongoing self assessment using the School Excellence Framework.

### **Activity 10 – Evaluation plan** (see p11 of the Guidelines)

The evaluation plan lists out the broad strategies and sources of evidence you will use to monitor progress towards achieving improvement measures.

#### Step 1:

- Go back and look at the improvement measure you have identified for your strategic direction.
- Confirm the evidence source/s you will use for each one.
- Summarise these in a list.

#### Step 2:

- There may be other sources of evidence that you intend to use to assess progress and impact within this strategic direction, over the three years.  
(For example, look at what you wrote under the 'how' heading on your purple sticky notes in Activity 9.)
- If there are, add these to the list.