Tools For Schools ™

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SMART MOVES

Achieving your vision depends on follow-through

By Joan Richardson

The vision statement has been finalized. The banners have been hung and T-shirts have been ordered. The school newsletter has been revised to prominently include the vision statement.

Now, what?

Publishing and publicizing a school's newly developed vision statement is an important way to communicate with the school's stakeholders. But it is only the beginning of the real work of using the vision as a guide and a measure for school improvement.

"The vision has to be tied to regular dialogue and review and mechanisms that make it live and breathe. Without that, it will never become viable,'' says Suzanne Bailey, who consults frequently on restructuring issues, including vision development and implementation.

Working to achieve the vision begins immediately after an organization has identified its goals. That means schools can't wait a year or, worse, five years, to determine whether they're achieving what they want.

"If you're the leader, build in mechanisms to evaluate your progress at the moment that you write the vision,'' she says.
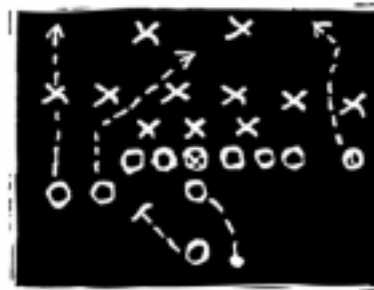
That's especially the case with schools that are struggling, Bailey says. "With low-performing schools, it's unreal to pretend that you're going to aim at something that's farther away than today's lunch. It's disrespectful. Look at what you're doing today,'' she urges.

DATA COLLECTION

Collecting data underlies all of the work to measure progress against the vision, agree Bailey and David Conley who also has done extensive work on school restructuring.

As soon the vision statement has been written, Conley urges schools to collect baseline data to assess the current reality at the school. "It's hard to argue with your own data,'' he says.

Data that is typically collected includes standardized test scores, daily student attendance, number of dropouts, demographic information about students and their families, parent attendance at parent-teacher conferences, disciplinary information, courses in which students are enrolled, and post-graduate plans for students.

Bailey cautions that data doesn't have to mean just test scores and other numerical measures. "If your data set is only test scores, you're doomed,'' she said.

Achieving your vision depends on follow-through

Continued from Page One

Teachers should also think about collecting classroom-based data, such as checklists of various types of activities and samples of assignments and student work.

She urges schools to write stories to describe what is happening today in their schools. For example, each teacher could write about the day in the life of a single student in his or her class. That same activity could be done at regular intervals through the year or over several years. Teachers could read those stories and "see'' the progress they're making—or not making.

"Tell the truth about things that aren't working,'' Bailey urges.

30-60-90

Before the vision-writing group returns to its regular work, Bailey suggests that group members identify where they want to be in 30-day increments. *(See Page 3.)*

What will we be doing in 30 days that we aren't doing now? How about in 60 days? 90 days? What are we doing that we want to keep? What are we doing that we want to discard? What challenges will we have overcome? What barriers will we still face? What skills are we learning?

For example, one part of the vision might be that all students will read at grade level by the end of 3rd grade. One of the 30-day goals might be learning what other schools have done to achieve that goal. The 60-day goal might be visiting one of those schools. The 90-day goal might be evaluating what ideas can be borrowed or adapted from those schools.

By describing the future in ways that are actionable and useful, Bailey says the group can break down the big work of achieving the vision into smaller, manageable chunks of work.

At the end of each 30 days, if the group can see the progress it has made, it will feel more confident that it can move forward, she says.

ACTION PLANS

Out of the 30-60-90 task comes a set of action plans. The action plans should be as specific as the team can make them. *(See Page 4 for an example.)*

For example, to achieve the first 30-day reading goal, one action plan would identify who will be responsible for identifying other schools that achieved a similar reading goal and what information will be gathered from those schools.

School teams should create one action plan for each short-term goal. Each time new goals are identified, the team should create new action plans.

INFORMATION GATHERING

Visions will wither if they don't have a continual flow of information to sustain them.

"Once you have a vision in place, if you don't have a rich source of ideas, you will re-invent the status quo,'' Conley says.

One idea for ensuring a steady flow of is to create study groups around various components of the vision. Then, let loose a group of teachers to explore those ideas.

"Give this to those people on your staff who are the thinkers. Keep that group in intellectual turmoil. You don't want them to settle down and become implementers. You want them to keep churning out new ideas because that brings enthusiasm back into the process,'' Conley says.

STAFF MEETINGS

As schools put action plans and study groups in place, staff meetings are good opportunities to keep track of a school's progress. Reporting and celebrating progress helps an organization build momentum and energy.

Schools that use staff meetings to regularly measure progress towards the school goals also begin to shift the school culture towards one that embraces continuous progress, Conley says. Staff understands that teachers come together to learn from each other and to talk about the work that they do, not merely to sit passively and hear information delivered

by the principal.

In the case of the reading example, staff members might share the information they have gathered from other schools. Other staff members will not only be included in what a core group is learning, they will also be able to raise questions and provide more specific direction for those collecting the information.

As the school moves farther in the process, teachers might use staff meetings to share what they have learned , what they tried with their student and with what results.

DOCUMENT PROGRESS

Create some spaces in the school year where teachers and other school team members can stop and evaluate their achievements.

"Human beings are event-oriented so create an event where everyone can sit back and think and talk about what they've done,'' Conley says.

Bring in a facilitator, perhaps a district staff developer, to guide the discussion. Conley recommends taking such meetings off-site in order to free up discussions. Bailey recommends meeting in this way once a month

For such meetings, Bailey encourages groups to bring anything that will demonstrate what the group has achieved. This could include photographs, examples of student work, notes from journals, calendars, etc.

Then, using a chart similar to that found on Page 6, she guides the groups through a story-telling process.

THE VISION TEST

At some point, the vision should become so much a part of "the way we do business'' that schools will turn to the vision for guidance on making key decisions.

The vision, rather than becoming a far-off goal to reach, will become a screen to filter out ideas. *Does this proposed program or project pass the vision test? Will this help move us towards our vision?*

"If it doesn't pass through the filter, then set it aside,'' says Bailey.

Making our future closer

COMMENTS TO THE FACILITATOR: This chart can be used to help the group make commitments to short-term actions.

TIME: One hour.

SUPPLIES: Poster paper, markers, tape.

PREPARATION: Facilitator should sketch out the chart depicted below and be prepared to post it on wall. Ideally, this poster will remain on a wall near the vision poster.

Directions

Describe our best "guess" of what we will be doing in 30-day increments to reach our vision.

Scenario elements	30 days	60 days	90 days
Our major focus			
What adults are doing			
What students are doing			
Skills being learned			
Tools and materials being used			
Challenges: benefits and frustrations			

Source: *Making Progress Visible: Implementing Standards and Other Large Scale Change Initiatives* by Suzanne Bailey. For ordering information, see Page 7.

FROM VISION TO ACTION
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**SHOW PASSION AND COMMITMENT TO THE VISION.**

Express it simply but dramatically to set the tone. Show how it opens up new opportunities for the organization and everyone in it and how it can make a real difference in society. Trumpet it prominently in publications and press releases. Gain endorsement of the vision by opinion leaders inside and outside the organization.

Source: *Leaders Who Make a Difference*, by Burt Nanus and Stephen Dobbs. San Francisco, Calif.: Jossey-Bass, 1999.

"Vision isn't forecasting the future. It is creating the future by taking action in the present."

— James Collins and Jerry Porras

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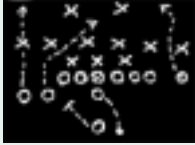
FROM VISION TO ACTION

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ENGAGE OTHERS IN ADVANCING THE VISION.

Bring all the stakeholders into the tent. Encourage people to assume responsibilities and take risks consistent with the vision. Solicit ideas from others, both inside and outside the organization. Celebrate progress, such as grants received to implement parts of the vision or new programs successfully launched. Show appreciation for vision champions, those who take the initiative to advance the vision.

Source: *Leaders Who Make a Difference*, by Burt Nanus and Stephen Dobbs. San Francisco, Calif.: Jossey-Bass, 1999.

"Only passions, great passions, can elevate the soul to great things."
　　　　　— Denis Diderot

August/September 2000

Action plan

GOAL:

MEASURES OF SUCCESS:

WHAT WILL WE DO?

HOW WILL WE DO THIS?

WHO WILL DO THIS?

WHEN WILL THIS BE DONE?

REFLECTIONS ON ACTION

Gather data to inform practice

COMMENTS TO THE FACILITATOR: This activity will encourage participants to think ahead about the kind of data they will need to gather to measure their progress in achieving the vision.

TIME: 90 minutes total — 45 minutes for individuals to complete their respective charts and 45 minutes to them to work in pairs or trios. Option: the facilitator could ask participants to fill out the chart on their own and bring it to a meeting of the large group.

Directions

1. Facilitators should reproduce the chart pictured below and distribute individual sheets to participants. Separately, the facilitator should create the same chart on a large piece of poster paper that can be posted in the room.

2. Individuals should fill in the chart, either as pre-work or as part of the session. If this is done in the sessions, allow 45 minutes for this work.

3. Divide the group into pairs or trios.

4. Each pair or trio should discuss these questions:
    - What are we learning about our practices?
    - What themes are emerging in our work?
    - What working theories can we test to increase our results individually or as a collective?
    - What new questions are we asking?
    - What best practices can we share with others?

Situation	Action Planned	Results	Learnings
Context	What	Notable results	Insights
Question			
Anticipated results	How	Actual results	Knowledge to share
Assumptions/ beliefs			New questions and next steps

Source: *Making Progress Visible: Implementing Standards and Other Large Scale Change Initiatives* by Suzanne Bailey. For ordering information, see Page 7.

FROM VISION TO ACTION
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PROVIDE THE NECESSARY SUPPORT.

Secure funding targeted at important parts of the vision. Hire people or recruit volunteers who share the passion for the vision and can bring useful skills to bear in achieving it. Invest in training and pilot projects. Design policies, plans, and practices that support the vision. Help lower-level leaders develop their own visions and strategies consistent with the larger vision.

Source: *Leaders Who Make a Difference*, by Burt Nanus and Stephen Dobbs. San Francisco, Calif.: Jossey-Bass, 1999.

"We are such stuff as dreams are made of."
   *– **William Shakespeare, A Midsummer Night's Dream***

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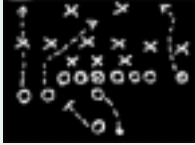
FROM VISION TO ACTION
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MEASURE PROGRESS TOWARD ACHIEVING THE VISION.

Evaluate the levels of synergy and innovation in the organization in pursuit of the vision. Determine whether the rate of progress is satisfactory and whether performance is improving on the key measures. Track the external environment to see if it is changing in ways that affect the relevance of the vision.

Source: *Leaders Who Make a Difference*, by Burt Nanus and Stephen Dobbs. San Francisco, Calif.: Jossey-Bass, 1999.

"Worse than being blind is to see and have no vision."
– Helen Keller

August/September 2000

Document your progress

COMMENTS TO FACILITATORS: This fill-in-as-you-go chart should be used in a meeting at least once a month with the core team charged with achieving the vision. This tool can be used to document the progress that schools/districts are making towards achieving their vision. By posting this in the same room where the vision is posted, the poster is also a visual reminder to teachers and others that they should be alert for evidence of how their work measures up against the vision.

TIME: One hour.

SUPPLIES: Poster paper, colored marking pens, tape.

PREPARATION: Re-create the chart below on a large sheet of poster paper and post it in the meeting room.

Directions

Assemble the core team charged with achieving the vision. Ensure that team members know in advance that they will be documenting the progress they have made in achieving the vision. The invitation for this meeting should advise participants to bring information and artifacts with them to document the work they have done.

The facilitator can be the scribe for the chart or various team members can be invited to add their own notations.

Documentation areas	First month	Second month	Third month	Fourth month
Major events and activities				
Results				
Learnings and best practices				
Artifacts				

Source: *Making Progress Visible: Implementing Standards and Other Large Scale Change Initiatives* by Suzanne Bailey. For ordering information, see Page 7.

Learning about
using your vision

■ *Fifth Discipline Fieldbook* by Peter Senge, et al. New York: Doubleday, 1994. Practical guidebook for Senge's original *The Fifth Discipline.* Includes many useful ideas for putting Senge's philosophy into practice. Check library or bookstore for a copy.

■ *Idea Book on Planning: Implementing Schoolwide Programs,* (Volume 1) by U.S. Department of Education. Highlights effective methods and useful resources for planning schoolwide programs. Focuses on the issues of schoolwide program planning and combining resources and contains many examples on these issues from various schools. Includes excellent chapter on vision work. Available online at www.ed.gov/pubs/Idea_Planning/. To order, call (877) 433-7827, fax (301) 470-1244, or web: www.ed.gov/pubs/edpubs.html. No charge.

■ *Making Progress Visible: Implementing Standards and Other Large Scale Change Initiatives* by Suzanne Bailey. Focuses on aiding schools to see the progress they are making toward their goals. Offers a new idea or new tool on virtually every page. To order copies, call (707) 448-1520 or fax (707) 448-2352. Price: $26 plus tax and shipping.

■ *Plan or Die: Ten Keys to Organizational Success*, by Timothy Nolan, Leonard Goodstein, and J. William Pfeiffer. San Diego, Calif.: Pfeiffer & Co., 1993. Guidelines for developing a clear organizational plan based on an organization's vision for its future. Check local library or booktore for a copy.

■ *Roadmap to Restructuring: Policies, Practices and the Emerging Visions of Schooling* by David T. Conley. Eugene, Ore.: ERIC Clearinghouse on Educational Management, 1994. Comprehensive synthesis of current thinking and practice in restructuring. Both scholarly and practical, it includes a lengthy chapter on visioning that includes description of and tips for various stages in the visioning process. To order, call (800) 438-8841, (541) 346-5044, fax (541) 346-2334, or web: http://eric.uoregon.edu. Price: $23.95, paper; $34.95, hardback, plus shipping and handling.

■ *The School Portfolio: A Comprehensive Framework For School Improvement*, by Victoria Bernhardt. Princeton, N.J.: Eye on Education, 1994. Guidebook for creating and using a school profile for sharing information about progress towards goals. Available through NSDC's Online Bookstore, www.nsdc.org/bookstore.htm. Item # B90. Price: $37, non-members; $29.60, members.

■ "Translating school improvement into numbers,'' by Joan Richardson, *School Team Innovator*, February 1997. Describes a cycle for data-based decision making and can be used as a guide for implementing vision. Available in NSDC's Online Library, www.nsdc.org/library. To order a back copy, calling the NSDC Main Business Office at (800) 727-7288.

on the web

www.nsdc.org/library/mission.html

Look in the NSDC Online Library for more resources on both mission and vision work. This library is updated regularly with new materials. Comprehensive members of NSDC also have access to full text of every NSDC publication. To learn more about that membership option, contact the NSDC business office at (800) 727-7288.

August/September 2000

Tools For Schools

Ask Dr. Developer

Dr. Developer has all the answers to questions that staff developers ask. (At least he thinks he does!)

Vision work begins with each person

Q *Several years ago, our school went through the whole visioning process. We had a lot of meetings and we spent a lot of money to create banners but nothing really happened. I agreed with the ideas in the vision statement and I was disappointed that the principal didn't provide more direction in making it come true. Is there anything I can do by myself?*

A Schools often give up before they start because achieving the vision feels hopeless. If the vision process has been done correctly, schools have described a big future that is beyond their grasp. That future feels too big, too unachievable, too different. There has to be a discrepancy between what is and what ought to be. If there isn't, then the vision is only an endorsement of the status quo.

The antidote to that feeling of hopelessness is to break down the work of implementing the vision into bite-size chunks.

Ideally, the principal of your school should facilitate a plan for how the school will achieve the vision. But, if the principal is unable to provide that kind of leadership, you can still do some of this work yourself.

Break down the vision statement into its components and decide which component you want to focus on. Then, each day, think about what you can do to work towards making that portion of the vision a reality.

For example, if your vision includes a statement about ensuring a close relationship between the school and families, you might contact the parent of one child in your class each day, either by telephoning or writing a note to the parent.

Then, at the end of each day, look back at your work and identify what you did that day that you would consider "vision work."

You can take many of the ideas described in the main article of this issue and personalize them for yourself. For example, you can collect data about your own students. You can measure their achievement over time. You can write stories about the work they're doing and how they've changed.

As times goes along, you may find ways to let your colleagues know what you're doing and what you're learning. In that way, you will be able to encourage others to do similar work themselves.

And, in that way, you will be doing significant work to help your school achieve its vision.

Tools may be copied and used in workshops.

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