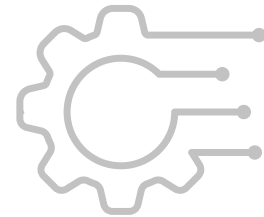


# ANNUAL SCHOOL PLANNING

TOOLKIT



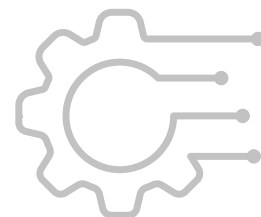


# INNOVATION TOOLKIT

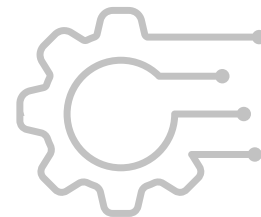
This toolkit provides a set of tools and guidance to support the Annual School Planning (ASP) process, resulting in decisions that will increase access to high-quality, best-fit schools

This toolkit can be used as a playbook for the process that ensures districts review school performance, engage with their community, and decide the trajectory of each campus for the future. Chief Innovation Officers, in collaboration with leaders within their school systems, school board members, and their superintendent, will use the tools supplied here to engage in the process of informed decision making in order to improve student outcomes towards the district's North Star Goal.

Districts have autonomy to choose the best way to engage in this process, but the results for Annual School Planning remain tight: an SGS-aligned North Star goal, a thorough Quality Seats Analysis, and community engagement and input, all of which inform the Strategic School Action Plan for the following school year. While variability is expected for the "how" of the process (due to existing systems for Annual School Planning, years in SGS, relative performance of campuses, and size of the district), all districts are working toward a complete ASP cycle to inform innovation improvement in a district. This toolkit is intended to provide descriptive framing and how-to examples to aid districts to create an efficient and informed process that is best for them.



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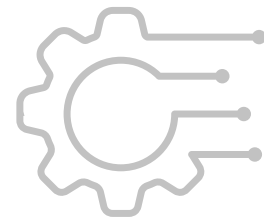
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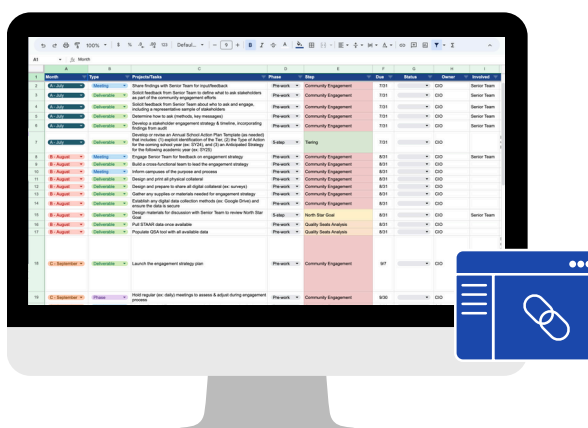
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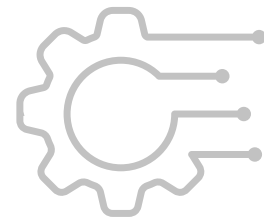


# OVERVIEW OF ANNUAL SCHOOL PLANNING

Through the **Annual School Planning (ASP) process**, Districts develop a plan that considers all possible strategies-- including school improvement, school action, and campus expansion-- to improve access to high-quality schools. Each step of the process outlined in this toolkit gets compiled into a final document of the same name: the Annual School Plan.

The Annual School Planning process is a months-long process best executed through a coalition and regular communication structures. To launch a successful Annual School Planning season that ends by December of any calendar year, begin using a resource like the [ASP Project Plan Workbook](#) in late spring to anticipate and assign tasks, timelines, and owners to the activities within. The workbook will help determine the best timing for engaging the community and for communicating that timeline to the campus-based leaders who will support the engagement effort. Build this plan into standing agendas and Board meetings as well.





# ANNUAL SCHOOL PLANNING PROCESS

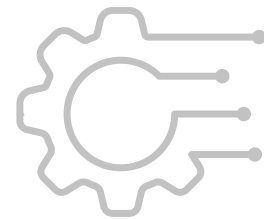
The Annual School Planning Process consists of two phases:

- Analyzing school performance and community need and demand, which includes conducting a Quality Seats Analysis, engaging your community, and drafting a North Star Goal (see appendix for more information), followed by
- a Five-Step process to determine the right strategies, actions, and improvements for each school based on your data

## Five-Step Process

1. Review North Star Goal\* & Quality Seats Analysis Data
2. Review Community Engagement Data
3. Tier Campuses
4. Generate Possible School Strategies for Each Tier
5. Create Strategic School Action Plan

*\*If 2nd+ time conducting QSA/ASP*



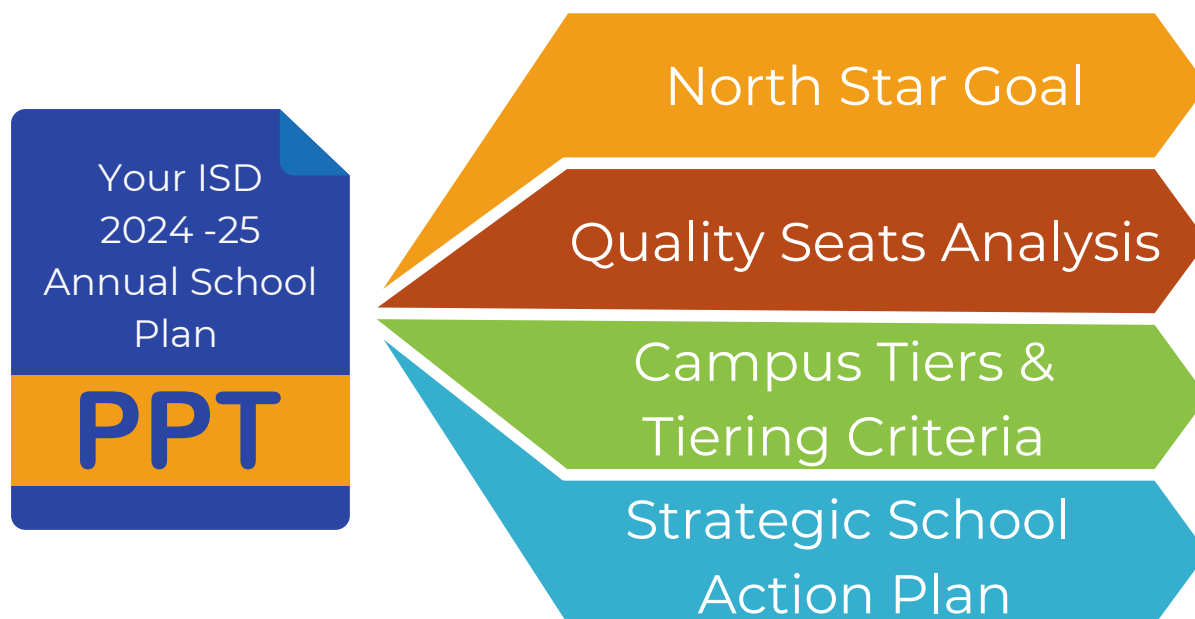
# ANNUAL SCHOOL PLANNING PROCESS

## The Result

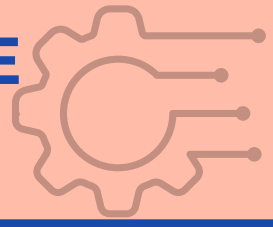
Having completed the activities outlined in this toolkit, the end result is your Annual School Plan, a single document or presentation deck that contains the artifacts or evidence of your District's discussions and decisions.

A complete Annual School Plan should include:

1. North Star Goal
2. Quality Seats Analysis (including Community Engagement data)
3. Tiered Campuses and supporting criteria, and
4. Strategic School Action Plan



The sections that follow are designed to to give you an overview of each part of the Annual School Planning process and to complete the Five-Step process.

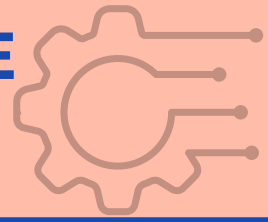


The QSA uses key data to help the district understand and prioritize the most critical opportunities for schools to ensure every student is in a high quality, best-fit school.

District leaders annually collect and analyze a comprehensive set of district and campus-level data points that track progress toward increasing the number and percent of students in A or B schools across the district and informs strategic decision making.

Though additional data points can be added over time, each QSA should consistently include:

- academic data
- demographic data
- long-term trends, and
- community input



## A Quality Seats Analysis should:



### Name North Star Goal

The District Board has adopted a North Star Goal in terms of the # and % of students in A/B schools in the next 3-5 years, which serves as an overarching goal to cohere Lone Star Governance and HB3-related goals.



### Define characteristics of a high-quality, in-demand campus

District leaders clearly define the characteristics of a high quality, high demand campus, including student performance measures, student, family, and community input, and enrollment trends.



### Provide data to all district senior leaders

The District has a single source of truth for all QSA-relevant data that is accessible to and informed by senior district leaders.



### Describe progress towards the North Star Goal

The QSA makes a final determination of whether or not the district is on-track to achieve its North Star Goal.



### Be transparently and consistently shared

District leaders, including the Superintendent, dedicate Cabinet and senior leadership meeting time appropriately in summer and fall of each year to collaboratively analyze and interpret QSA data.

## RESOURCES & LINKS

[QSA Dashboard](#)

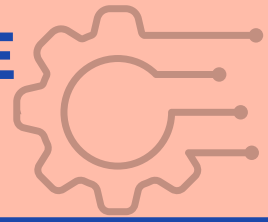
[Sample QSA: Lubbock](#)

[Sample QSA: Midland](#)

[CIO Role](#)







A Quality Seats Analysis toolkit is available to instantly produce graphics and slides that can serve as the foundation for your QSA.

The QSA Toolkit consists of three primary components:

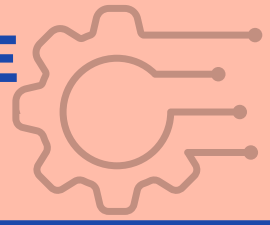
1) The QSA Dashboard: An online Tableau dashboard designed to help visualize & filter different aspects of a district's accountability data.

2) The QSA Data Analysis Form: An online form with prompts to explore your district data, generate insights, & collect the graphs and visuals needed for a QSA presentation.

3) The QSA Presentation Template: An automatically generated presentation with your content placed and ready to go!

## RESOURCE & LINK





Family and community voice informs decision making in the ASP process. Implementing practices to elicit their feedback provide essential data point to include alongside QSA data. Attached is a workbook to guide SGS districts through the process of district-wide family and community engagement efforts.

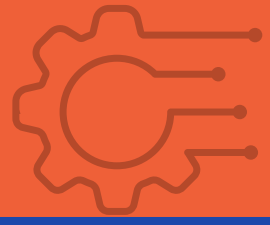
## RESOURCES & LINKS



### Community Informed Annual School Planning

A workbook divided into three phases to support the planning, implementation, & sharing of a robust community engagement process.

# FIVE-STEP PROCESS



During the Five-Step Process, the CIO guides the Senior Leadership & the Board through thoughtful analysis, discussion, decision-making, and consensus building using the Quality Seats Analysis and Community Engagement data as a guide.

1 Review North Star Goal & Quality Seats Analysis Data

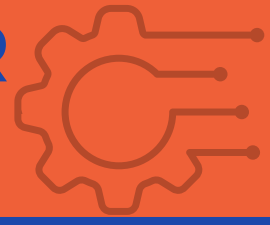
2 Review Community Engagement Data

3 Tier Campuses

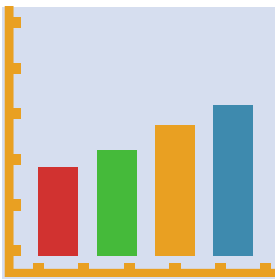
4 Generate Possible School Strategies for Each Tier

5 Create Strategic School Action Plan

# STEP 1: REVIEW NORTH STAR GOAL & QSA DATA

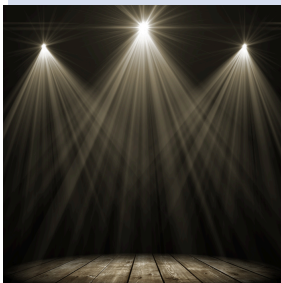


Using the **Quality Seats Analysis**, the CIO should lead the Senior Team through a review of the **QSA** data, facilitating discourse and conversation using guiding questions using the QSA Discussion Protocol to guide the process and create materials.



## Related to Student Achievement Data

- What do we learn from looking at our "percent Meets" across our campuses?
- How might looking at **just** STAAR Component scores for high school inform campus action decisions?



## Widely Applicable Prompts

- What are some bright spots we see?
- What are the root causes of success?
- What factors are driving low performance?



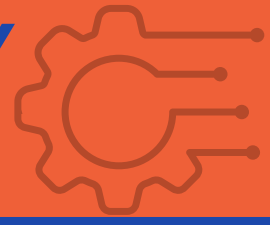
## Related to North Star Goal

- How does our current performance compare to our district's goal for the number of schools and students that will be served in high quality schools?

---

The CIO role during this review is to generate high levels of engagement by leading a discussion-driven session in all participants' voices are included.

# STEP 2: REVIEW COMMUNITY ENGAGEMENT DATA



Using the information collected when analyzing community need, the CIO leads the Senior Team through a review of the data, facilitating discourse and conversation using guiding questions such as:



## Related to Family/Student Satisfaction

- What is our community telling us they'd like to see start/stop/continue?



## Widely Applicable Prompts

- What are some bright spots we see?
- What are the root causes of success?
- What factors are driving low performance?

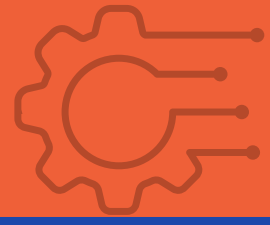


## Related to Possible School Strategies

- What school model would best meet the needs shown in the data?

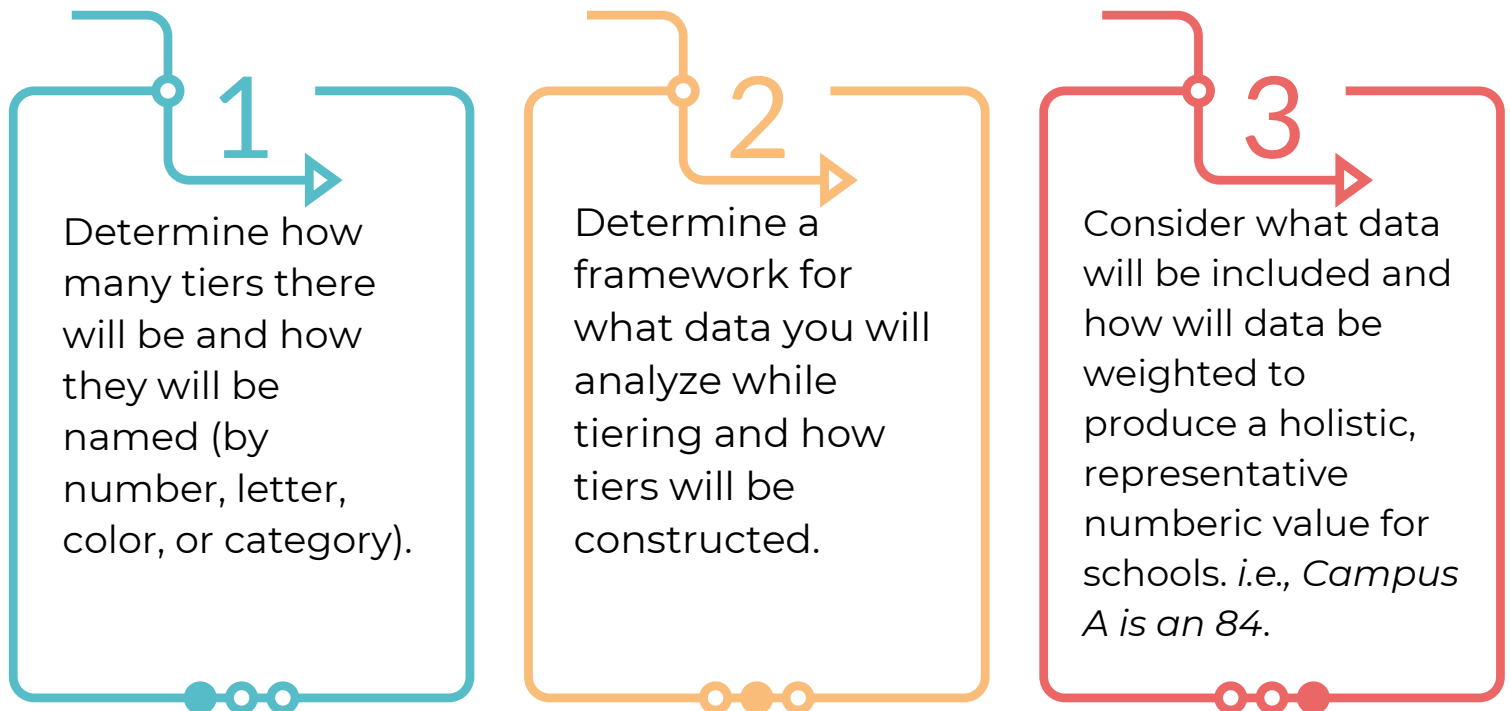
The CIO role during this review is to generate high levels of engagement by leading a discussion-driven session in all participants' voices are included.

# STEP 3: TIER CAMPUSES: PART 1



A main outcome of the Five-step process is to create a **Strategic School Action Plan (Step 5)**: an enduring document that captures the best action at the right time for each campus, based on tiers and data. See the [ASP Discussion Protocol](#) for support leading these steps.

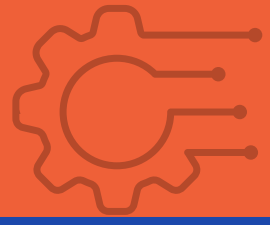
In order to create that plan, campuses first need to be tiered. Tiering happens in two parts. The first part is to determine the number of tiers and the criteria associated with each tier.



Common data considerations include:

STAAR   Enrollment   Discipline   Attendance   Staff retention  
Internal benchmark   Blended Learning   Chronic Absenteeism   CCMR

# STEP 3: TIER CAMPUSES: PART 2



The second part of the tiering process is to assign each campus its value according to criteria from part one and to sort campuses into tiers

Using the framework and data identified in part one, assign campuses a numerical value. Then determine the cut scores that separate the tiers. Then, separate schools into tiers based on their scores. Tiering schools is a way of organizing them to prioritize strategic action.

Finally, consider:

- Do the resulting tiers seem accurate for each school? Do they resonate with the Senior Leadership Team's perception of that campus?
- What data may need to be included/removed for a more accurate tiering process (for the following year)?
- Who receives communication about the tiers? How do tiers get communicated?

## RESOURCES & LINKS

[Data Collection and Campus Prioritization Tool](#)

### Sample Tiers:

[Spring ISD Tiered System of Campus Support](#)

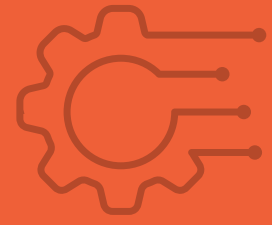
[Midland ISD Tiering Criteria](#)

[Midland ISD Criteria Rubric](#)

[Tiering Spreadsheet Example](#)



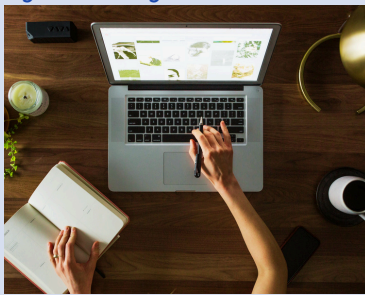
# STEP 4: GENERATE POSSIBLE SCHOOL STRATEGIES FOR EACH TIER



Now that tiers have been created, the next step towards creating a Strategic School Action Plan is to generate lists of possible school strategies for each tier.

The result will be that each tier has multiple strategies that could be assigned to a campus placed in that tier. For example, possible school strategies for campuses in the lowest tier could be to restart the campus, reassign students to other campuses, or seek an operating partner to run an in-district charter.

Research and consider all school actions and strategies available for this year's cycle.



District leaders develop an Annual School Plan that considers all possible strategies to improve access to high-quality school, including traditional school improvement strategies, specialized campus-based programs, and campus-wide school actions.

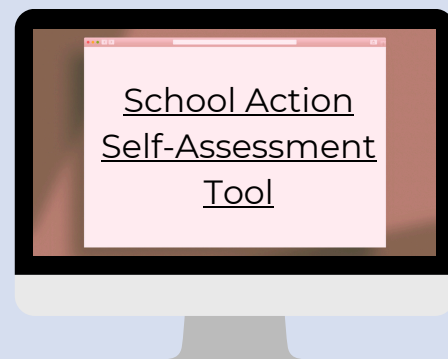
Attend webinars, reach out to the [Center for School Actions](#), and (if applicable) work with your Executive Advisor to understand all options available.

Discuss the criteria by which you will select the best-fit action

Consider

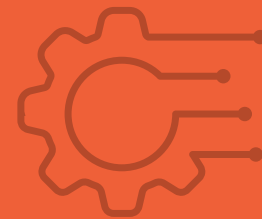
- District priorities and capacity
- Campus-level performance, enrollment, and facility capacity data (from your QSA or Tiering)
- Current campus educators and leadership as well as the future pipeline
- Community demand and need (from your Community Engagement)
- Stakeholder will and political landscape
- Requirements for different SAF School Actions

## RESOURCES & LINKS

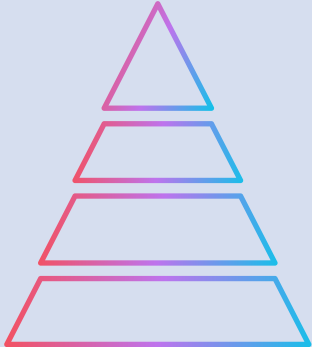




# STEP 4: GENERATE POSSIBLE SCHOOL STRATEGIES FOR EACH TIER



However, it is important to keep in mind that some possible school strategies are not necessarily assigned to a campus, but perhaps to a leader. For example, a possible school strategy in the high-performing tier might be to recruit a leader to apply to create a new school to fulfill a community desire uncovered through the community engagement effort. Another possible school strategy would be to encourage a successful leader to respond to a Call for Quality schools in order to operate a district campus with the autonomy and additional funding an in-district charter and 1882 partnership can provide.



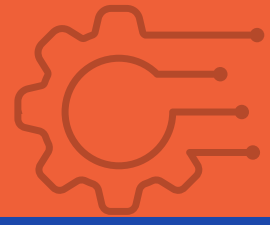
### Determining Action Options for Each Tier

District leaders make Annual School Plan decisions collaboratively as a team that includes senior leaders that oversee academic and operational aspects of the district, including curriculum and instruction, school leadership, finance and budget, and innovation.

Decision making can be complex, given the constantly changing context of a district and the landscape of school action options each cycle

In the next and final section, the process for choosing and memorializing the "right on time" strategies to respond to campus tiering is explained.

# STEP 5: CREATE STRATEGIC SCHOOL ACTION PLAN



Having created tiers, generated lists of possible school strategies by each tier, and assigned each campus to a tier, the fifth and final step of the process is to create the Strategic School Action Plan: a reference document that contains the specific actions the district will take and the timeline for when those actions will occur.

To create a complete Strategic School Action Plan, the Senior Team will:



## Select Strategies to Implement

The Senior Team comes to consensus regarding which possible school strategy will be prioritized from each tier's list of options.



## Create Strategic School Action Plan spreadsheet

Once prioritized strategies have been selected, memorialize them in a Strategic School Action spreadsheet to ensure strong communication and execution of all actions the following school year.

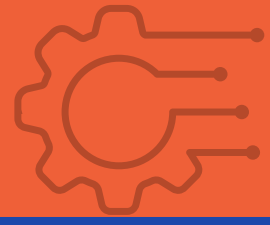
## RESOURCES & LINKS

Exemplar:

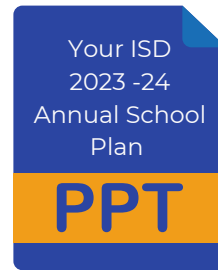
[Seguin ISD Strategic School Action Plan](#)



# STEP 5: CREATE STRATEGIC SCHOOL ACTION PLAN

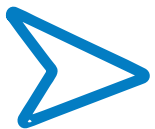


With the Five-Step process complete and the artifacts compiled to form an Annual School Plan, see the two bullets below for two sets of activities that will help ensure your organization has the smoothest course possible as it sets out to achieve its North Star Goal.



## Share with the Board & other Stakeholders

District leaders share the Annual Quality Seats Analysis & School Plan publicly and transparently to Board members, impacted stakeholders, and community members in a timely manner. Commonly, this information is shared via slide deck or other presentation containing the data that explains key recommendations and actions.

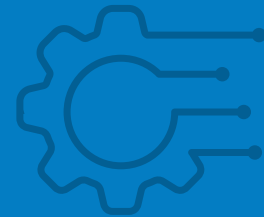


## Implement with Fidelity

Districts implement the Annual School Plan with fidelity and in line with publicly shared information, including using the annual plan to guide work under Essential Actions 2, 3, and 4.

- District leaders dedicate organizational capacity and financial resources to provide and protect adequate planning time to ensure strong implementation of all new school models, including specialized campus-based programs, and campus-wide school actions.
- District leaders implement evidence-based change management strategies with fidelity to create and maintain strong support for the new school model at the campus, district, and community level.
- District leaders strategically pursue all relevant support to plan and implement new and innovative school models, including the School Action Fund and other relevant funding opportunities.
- District and campus leaders follow evidence-based practices to plan and implement new and innovative school models with fidelity, including the implementation of high-quality instructional materials and research-based instructional strategies.

# APPENDIX A: GLOSSARY

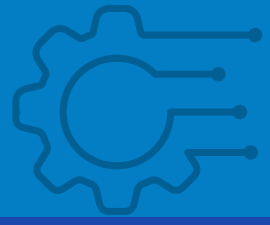


**Annual School Planning process:** the months-long process oriented towards achieving a district's North Star Goal by considering all possible strategies for improving access to high-quality seats and campuses based on recent data.

**Annual School Plan:** a slide deck or document containing the information created throughout the Annual School Planning process. It should include the North Star Goal and related progress towards achieving it, the Quality Seats Analysis (including Community engagement data), Campus Tiers and supporting criteria, School Actions & Strategies by Tier, Tiered Campuses, and the Strategic School Action Plan.

**School Actions:** bold strategies that transform low-performing schools, fulfill unmet community needs, and expand access to world-class learning environments for students.

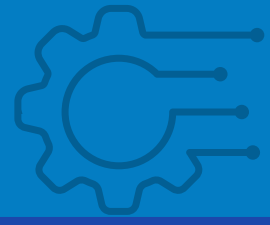
# APPENDIX A: GLOSSARY



**School Strategies:** Non-SAF grant strategies that may be generated by districts as appropriate actions to assign to campuses within a certain tier.

**Strategic School Action Plan:** a document or spreadsheet used to capture the School Actions or School Strategies assigned to each campus within a district to be undertaken at some point in the future.

# APPENDIX B: DRAFT NORTH STAR GOAL



*\*For districts conducting a QSA/ASP for the first time only.*

Districts review QSA Data in order to establish or edit the District North Star Goal and determine the big picture “how” to achieve the North Star Goal over time. This goal, written in terms of the number and percentage of students in A/B schools in the next 3-5 years, should be adopted by the district board and cohere with Lone Star Governance and HB3-related goals.

See TEA's Theory of Action Toolkit for guidance on establishing or refining a North Star Goal.

## RESOURCES & LINKS

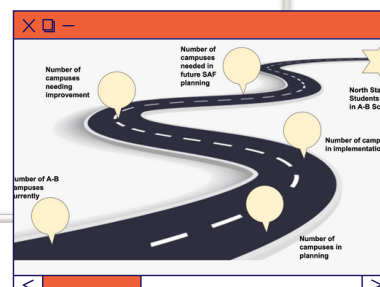
[Theory of Action Toolkit](#)

[Template for Path to North Star Goal](#)

[Lubbock Path to North Star Goal](#)

[Examples of North Star Goal](#)

[CIO Role in NSG](#)



# ACKNOWLEDGEMENTS



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Diversa Advisors is a Texas-based team of highly effective practitioners that have supported community-driven strategic planning efforts in Texas school districts of varying sizes with a focus on delivering equitable outcomes for students.

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512-202-5800