PLANNING GUIDELINES FOR 2014-15 SCHOOL YEAR

July 25, 2014

The following memo is intended to guide ongoing planning and implementation of KPBSD School Improvement Plans using the **OnStrategy** platform: www.onstrategyhq.com

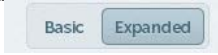## QUICK OVERVIEW: NEXT STEPS IN THE PROCESS

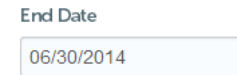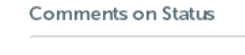| Planning Task	Time Frame
1. **2013-14 End of Year Check-Out:** Final Status Update and EOY Progress Reports for the 2013-14 School Year. • Note: Saving/Archiving 2013-14 Reports is very important before making live changes to your online plan.	**By August 15th**
2. **2014-15 School Plan:** Use the OnStrategy Platform to develop/refresh your annual plan for the 2014-15 School Year (Add/Revise/Delete to develop a current plan).	**September**
3. **Progress Reporting:** Updating progress throughout the year using the tracking and implementation features of OnStrategy.	**Monthly Process; beginning October**

GENERAL GUIDELINES

- **Web Browser:** Preferable internet browsers (for best functionality) are Google Chrome or Firefox. If using Internet Explorer, please ensure you are using IE9 or above.
- **URL:** OnStrategy was previously known/referred to as MyStrategicPlan. Both URLs are active. However, for consistency going forward, please bookmark the new URL: www.onstrategyhq.com
- **Login/Password:** Both your Login and Password are Case Sensitive. In most cases, the KPBSD email is structured with the following format: SDusek@KPBSD.k12.ak.us (note ALL CAPS where relevant). If you are having trouble with your login, please contact Natalie Bates.
- **Changes to Plan:** Please manage your plan with fidelity. Once your plan has gone through the approval process, please notify/seek approval before making any significant modifications or deletions to your plan.
- **Permission Structure:** OnStrategy has a built in permission structure that allows you to edit and revise items at the school/department "level" of the plan. Please use this ability with fidelity.
- **District-Wide Visibility:** OnStrategy allows for total visibility, transparency and collaboration across the district. In the Plan section, you can toggle between the **"view my"** feature to focus on your plan alone, or **"view all"** to see all goals across the district.

STEP 1: END OF YEAR CHECK-OUT

Please use the following process flow for closing out the 2013-14 School Year.

1.	Go to **Performance → Track Performance**	Track Performance
2.	Click on **Edit** (pencil icon) to update status on each goal assigned to you	
3.	Click the **Expanded View** button which allows for the capability to view/revise dates	Basic Expanded
4.	Go to the **"What's Your Progress"** <u>Drop Down</u> • If on Target/Complete: Select "I'm Done" to close out the Year. • If *Off-Target* (less than 50% complete): Select "I'm Behind" or "I'm Late" to reflect accurate status.	What's Your Progress? I'm done
5.	Go to **Progress YTD** and indicate your % completion (should be 90-100% if on target/complete for the year) • For KPI's (quantitative measures/targets) you will need to enter an actual numeric metric rather than % complete. • If updating a goal that is <u>marked as a KPI</u>, You will need to toggle back to the previous year, FY13/14 to enable you to enter your YTD metrics.	Progress YTD 100%
	• When updated accurately, goals that are Complete/On Target for 2013-14 will trigger a green, check-mark with 90-100% completion.	✓ 100%
	• Goals that need attention going into the next school year should show up as either yellow (for behind) or red (for off-target/not happening).	⊕ 50%
<u>Troubleshooting</u>: *Getting an Inaccurate Red Light?*		
	• For certain scenarios, you will need to modify the end date to reflect accurate status. • *Why?* We are closing out the year in August 2014 for a plan with end dates of 6/30/14. If a goal is NOT market as complete or "I'm Done" in the drop-down, the system will assume it's late and automatically default to the Red/Late status icon.	
6.	**Modify the End Date of the Goal:** • Change the end date to August (later than today's date) to trigger the correct status symbol in the report. *Remember, you have to be in <u>expanded view</u> to see/revise the dates.	End Date 06/30/2014
7.	**Comments on Status:** Add comments related to your end-of year progress and note if the goal is carrying over into next year. *Start the comment with today's date and be clear/concise. * Remember that comments show up on the final report and can be helpful to Board/Stakeholders in deciphering data.	Comments on Status
8.	**Save Reports:** Once all goals have been updated, go to **Reports, School/Department Reports→Performance Reports→Action Plan**. Select your School/Department name from the <u>drop-down</u> menu and download/save the **Action Plan Report** for your records. *This is your Final Progress Report for 2013-14.* • Note: Natalie Bates will download all KPBSD School Action Plan Reports on <u>August 15</u>[th]. These Reports will be shared on School Web Sites as a reflection of last year's progress.	**Performance Reports** Action Plan A quick-hit summary of progress against goals and action items. Great for use at strategy reviews.

STEP 2: CREATE/REFRESH YOUR 2014-15 ANNUAL PLAN

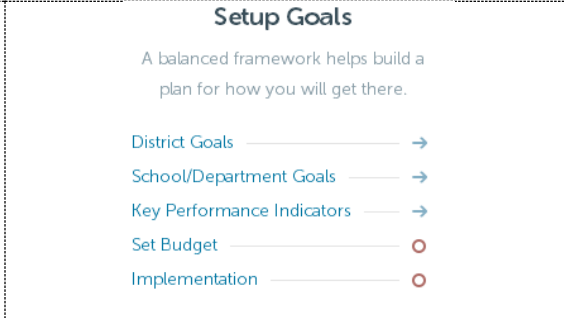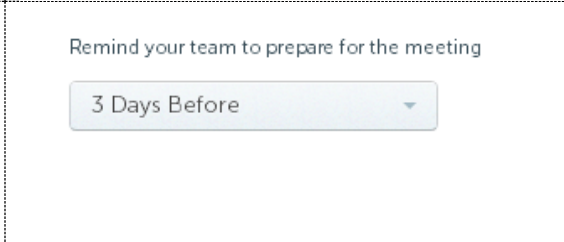Use the following guidelines for entering your School Improvement Plan for the coming school year.

1.	Go to **Plan → Setup Goals** to revise and add new goals to your plan.
2.	**Revise Goals that Carry Over:** If a goal is continuous or carrying over to the next School Year, revise the language accordingly and: ☐ **Change the End Date:** Update to reflect the new planning year. *An end date that is not updated will trigger the past-due/critical icon in the progress report.* ☐ **Start Date:** Keep start-date the same if you want to show plan *continuity* from the previous year. Or, based on your judgment, change date to indicate start of the new school year. ☐ **Revise Target:** Update the target field to reflect new milestones/metrics
3.	**Add New Goals:** Add any *new* goals that have been developed for the school year. Be sure to indicate start/end date accordingly. ☐ Review criteria for setting SMART goals; this is the opportunity to clean up and refine your plan.
4.	**Delete Past/Accomplished Goals:** Remove any 2013-14 goals that have either been completed, or do not carry over into this year's plan. ***Note about Deleting**: It is OK to delete annual goals and short-term actions that are no longer relevant. The point of a rolling plan is to keep it current, relevant and 'clean.' ☐ **Review Supporting Actions**: When you delete a Goal/Objective, the supporting action items *will also be deleted*. Review them first - if supporting items are active and relevant, the parents goal should probably remain in the plan and be revised accordingly.
5.	**Review/Clear out Status:** Go to **Performance→Track Progress** to review status of carry-over goals and clean up as relevant. ☐ *Clear Status*: If the goal is continuing into the next year but you want to start with clean status, go to Performance→Track Progress and change the status drop down to "not started" so that it can be updated accordingly for the first progress report of the new school year. ☐ **Review Status/Comments:** Remember, current status and comments will carry-over in progress reports. Consider deleting old comments and/or leave only the most recent few for reflection in current progress reports.
6.	**Reports:** Go to **Reports→School/Department Reports→Plan Reports** to preview several versions of your 2014-15 Report.

STEP 3: IMPLEMENTATION & TRACKING

Below are tools and tips within OnStrategy to support implementation and tracking throughout the school year.

Implementation Calendar

The Implementation Calendar allows you to set specific dates as well as reminders to help ensure you meet targeted milestones, deadlines for updating progress, etc.

1.	Go to the **Plan Section→Setup Goals** and click on **Implementation**.	**Setup Goals** A balanced framework helps build a plan for how you will get there. District Goals → School/Department Goals → Key Performance Indicators → Set Budget ○ Implementation ○
2.	Set upcoming milestone planning dates using the Review Calendar.	**Review Calendar** JUL AUG 8/15/2014 SEP OCT 10/1/2014 NOV DEC 12/31/2014
3.	Set the **Reminder** for 1-7 days before and an Email will be sent (from admin@onstrategyhq.com) reminding you to update progress and prepare for the meeting. **Note:** Only Principals/Dept. Directors are have OnStrategy Logins so the email will only go to you. Once reminded, you can forward on to any relevant members.	Remind your team to prepare for the meeting 3 Days Before ▼

General Tips for Updating Progress throughout the Year

You will be asked to track progress and provide status updates throughout the school year. Please make a habit of logging on to your plan on a monthly basis to stay current.

To Track Progress:
- Go to **Performance → Track Performance→** Click on **Update** for each goal
- **Progress Drop-Down**: Update your progress using the drop down menu (working on it, delayed, etc.)
- **YTD Progress**: Indicate your estimated % complete at mid-year or an actual metric if available (#, $, %).
- **Comments on Status**: Include notes/comments where relevant. Be sure to start each comment with the date.
- **Expanded View/Revisions**: Click on the *expanded view* to update your end-date if relevant.

Questions? Contact Sean Dusek (SDusek@KPBSD.k12.ak.us) or Natalie Bates (NBates@KPBSD.k12.ak.us) with questions related to the Planning Process. Contact **OnStrategy** (admin@onstrategyhq.com) with specific questions related the online application. Live Chat is available Mon-Friday.
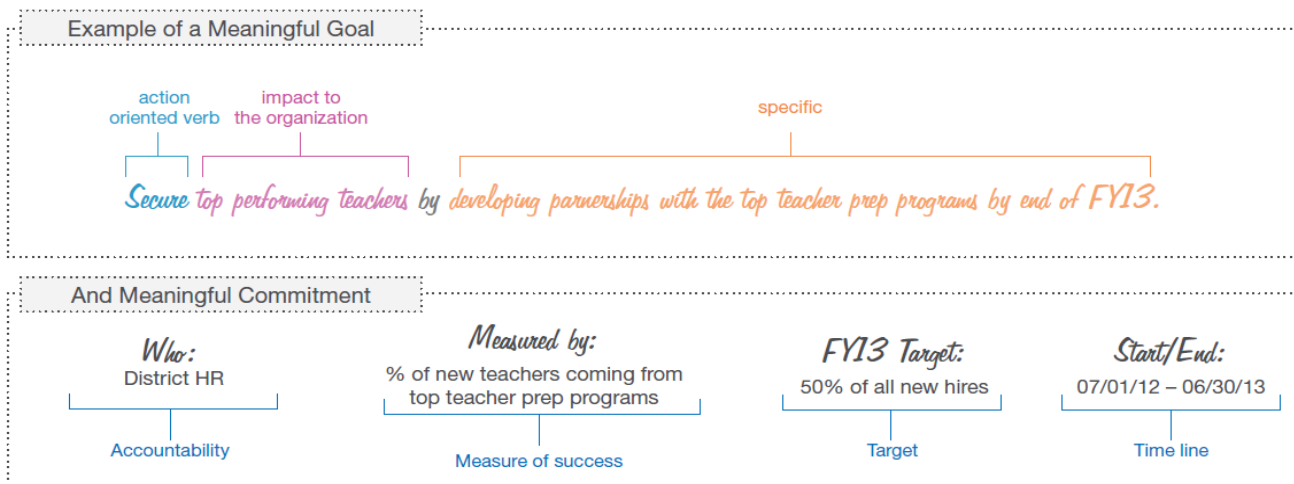
DEVELOPING SMART & MEANINGFUL GOALS

Meaningful Goals

- **What?** *Start with a Verb* to indicate what you intend to accomplish. Think action oriented verbs that motivate such as … Build, attain, complete, achieve, decrease, etc.
- **Why?** What is the result or ultimate outcome of the goal; think about why this goal is relevant.
- **How?** Outline the steps necessary to achieve the goal and break them down into manageable tasks/smaller cascading actions.
- **Obstacles?** Identify any obstacles or possible barriers to achieving the goal. Think through how you will deal with each issue and develop cascading actions to address possible roadblocks.
- **When?** Set a time frame to clarify when the goal is expected to be complete.
- **Make it SMART!** **S**pecific, **M**easurable, **A**ttainable, **R**esponsible and **T**ime Bound

SMART Goals

- ✓ **Specific**: Be Specific and clear about what has to get accomplished. Try to answer *how much* and *what kind* with each goal you write.
- ✓ **Measureable**: Know how you will measure progress and set a target to indicate success. Goals must be stated in quantifiable terms, or otherwise they're only good intentions. Measurable goals facilitate management planning, implementation, and control.
- ✓ **Attainable**: Create stretch goals but stay within reason. Goals must be achievable, or they're a setup for failure. Set goals you know you, your company, and your employees can realistically reach.
- ✓ **Responsible**: Be clear about ownership/accountability "who" is responsible.?) Goals must be assigned to a person or a department. But just because a person is assigned to a goal doesn't mean that she's solely responsible for its achievement.
- ✓ **Time Bound**: Set a time frame so everyone knows "when" the goal is expected to be completed.

Example of a Meaningful Goal

action oriented verb   impact to the organization   specific

Secure top performing teachers by developing parnerships with the top teacher prep programs by end of FY13.

And Meaningful Commitment

Who: District HR
Accountability

Measured by: % of new teachers coming from top teacher prep programs
Measure of success

FY13 Target: 50% of all new hires
Target

Start/End: 07/01/12 – 06/30/13
Time line

Quick Tips

1. Getting started

1. **Go to: mystrategicplan.com**
    Login feature in is at the upper right hand corner of the home page.
2. **Login:**
    Username: Your email address (case sensitive)
    Password: XXXXXXXXX

> Please enter a valid e-mail and password.
> **Email address**
> [Email Address]
> **Password**
> [Password]
> [Log in]   Forgot Password?

2. Add/revise/update your goals & actions

1. **Go to Plan > Goals**

    Home **Plan** Performance Reports

    Setup Goals
    A balanced framework helps build a plan to for how you will get there.
    Corporate Goals
    KPIs

2. **Add, revise, or delete what is assigned to you by clicking on the item.**

    Goals, Initiatives and Tasks

    ➕ = Add Item

    🗑 = Delete Item

    Save = Save changes

    ❯ = View or create supporting items

> **Tip:** Can't edit an item? That means you don't have permission to change it. Here is how permissions work:
>
> 1. District Focus Area (District only)
> 1.1. District Goal (District only)
> 1.1.1. Site/Department Goal (Director or Principal)
> 1.1.1.1. Team Member Goal (Team member only)
> 1.1.1.1.1. Team Member Action Goal (Team member only)

> **Tip:** Don't see your whole plan? Click on the "All" button on the top left of the screen.
>
> [Me Everyone]
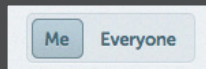
3. Update your status & track your progress

1. **Go to Performance > Track Performance**
2. **Update Your Progress when you see a pencil**

    [Track Performance]

    ↕ Edit ✏
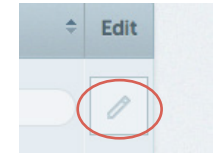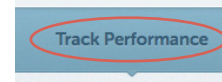
    ① Items where you are tracking progress with general status click the status icon

    - Select current status "What's my progress"
    - Enter how complete you are year to date
    - Add a small comment that explains the status and make sure to start it with the current date

    What's Your Progress?
    [I'm done ▼]
    - I'm done
    - I'm working on it
    - I haven't started / I'm behind
    - I need to defer
    - I'm waiting on someone
    - I'm late

    ② Items where you are tracking metrics, on a scorecard

    - Select current status "What's my progress"
    - Enter performance metric for the current month
    - Add a small comment and make sure to start it with the current date

> **Tip:** Remember this is your managerial estimation of how you are progressing against your goals. Don't write a novel or over-think the data input. It is simple on purpose.

4. Reports for your meetings

1. **Reports > District or School All Up Report** Download your **Full Plan** with Status to see item and progress.

2. **Functional Report for Directors/Principals & Team Members:** Download your **Action Plan** report to view actions, status and comments.