<table>
<thead>
<tr>
<th>Conceptual Framework</th>
</tr>
</thead>
<tbody>
<tr>
<td>The paradigm for shaping today’s educational leaders must include the creation of a culture and shared vision of excellence with all stakeholders. Leadership in today’s 21st century educational organizations emphasizes <strong>strategic planning</strong>, using <strong>data</strong> to make instructional improvements, building a <strong>culture of trust</strong> and understanding how <strong>theory guides the educational leader</strong> to <strong>solve problems of practice</strong>.</td>
</tr>
</tbody>
</table>

### Meeting Time
- **Spring 2015**

### Credit
- 3 EDU-7173—Meeting the Challenge: Strategic Planning for 21st Century Schools

### Instructor
- **Name:** Dr. Barbara J. Mallory  
  **Office:** 255 in SOE HPU Campus  
  **Telephone:** Office: 336.841.9575  
  **Cell:** 252.916.7685  
  **Email:** bmallory@highpoint.edu  
  **Office Hours:** Available, upon request

### Texts
- **21st Century Leaders Solving Problems of Practice**
  - The State Board of Education's priority measures and targets. See Priority Measures.  
  - Each DPI division's priority goals, activities and progress updates. Click on the name of any division to see more. [http://www.ncpublicschools.org/performance/](http://www.ncpublicschools.org/performance/)

  **Prepare Future-Ready and Globally Competitive Citizens Who are Prepared for Life in the 21st Century**  

  The guiding mission of the North Carolina State Board of Education is that every public school student will graduate from high school, globally competitive for work and postsecondary education and prepared for life in the 21st Century.

Read: Baldrige’s *Education Criteria for Performance Excellence* (pp. 1-12 and glossary) found at [http://www.nist.gov/baldrige/enter/education.cfm](http://www.nist.gov/baldrige/enter/education.cfm)

Study Baldrige’s Education Criteria for Performance Excellence (pp. 1-12 and glossary) Frame questions to ask guest speaker (Melanie Taylor) about Iredell-Statesville’s implementation of Baldrige model.

(Not required; will be used by professor for class presentations and activities)


Dr. Hall will present in class in January. She will present strategic planning tools helpful in working with a strategic planning team from this text.


In designing your problem solution, you will use the process described in this text. We will study this design process in class in January and February.

**Pre-Requisite**

EDU 7171 and EDU 7172

**Co-Requisite**

EDU 7176: The Nature of Organizational Cultures and Shared Leadership

**Course Catalogue Description**

This course will begin with an examination of the Guiding Mission for N.C. Public Schools adopted by the N.C. State Board of Education in 2006. Specifically, the impact of this mission, to Prepare Future-Ready and Globally Competitive Citizens Who are Prepared for Life in the 21st Century will provide the foundation for discussions involving district strategic planning. An examination of the processes and mechanics of creating and implementing a strategic plan will be highlighted. Various planning models that facilitate empowerment of local school and community leaders in the planning and implementation processes will be shared. Attention on developing a shared vision, team-building strategies, aligning district and school-based plans as they relate to the broader N.C. Mission will be emphasized.

(3) Spring, Year 1

**Course Objectives**

1. To gain knowledge and understanding of the planning functions as related to educational settings.
2. To apply a working understanding of various planning models, tools, technologies, and data resources useful for educational planners.
3. To understand the role of planning in relationship to other administrative responsibilities and the context of district leadership.
4. To analyze strategic plans.
5. To develop leadership knowledge, skills, and dispositions needed to direct strategic improvement in educational organizations.

**Learning Outcome:**

The candidates will know and be expected to do:

**Learning Outcome Assessment Method**

- Professional Development Strategic Plan Project;
- Debrief of strategic planning sessions;
- Analysis of Strategic Plan Project

**LEARNING OUTCOMES**

1. Candidates will identify and share best practices to formulate a vision, mission, and goals for continuous improvement in school districts.
### COURSE ASSIGNMENTS

The course grade will be determined based on candidate’s performance both in class and online. The candidate’s performance in required field and class activities, both in ability to secure necessary documents and in capacity to participate in planning processes, will be critical to success in the course. Candidates are expected and required to complete the following assignments.


**RATIONALE:** As a doctoral student in High Point University’s EdD Program, you will be expected to prepare and defend a strategic plan that is designed to solve a major educational problem of practice as your dissertation of practice. You will do this by working with others in the district (or state) (or university setting) to identify a problem of practice and then design a plan to solve it. The strategic planning process and plan itself will be written up and referred to as “the dissertation of practice.” It is the culminating project that is required to satisfy requirements of the EdD degree in the HPU EdD Program.

This course- EDU 7173: Meeting the Challenge: Strategic Planning for 21st Century Schools-is the foundational course that addresses strategic planning process, skills, tools, and best practice. There is no one way to design and implement a strategic plan, but the PLAN, DO, CHECK, ACT model is at the core of most planning processes. There are also critical questions that drive the strategic planning process. These questions are: What’s the problem? How do you know it’s a problem (and not a symptom of a larger problem)? How is the problem impacting our organization (mission, vision, goals)? What will we do about it? How will we know if our designed strategies are working? What impact is the solution having on the problem? What if strategies are not working? What’s our next practice?

To socialize you to types of strategic plans, we will evaluate current strategic plans in practice in NC. These are not

| 2. | Candidates will understand the role of leadership in applying a working understanding of various planning models, tools, technologies, and data resources useful as educational planning functions. | • Strategic Planning Project; • Demonstration of use of planning tools. |
| 3. | Candidates will conduct an analysis of the North Carolina Guide to Strengthening Our Public Schools, a strategic plan developed with participation from and support from all superintendents of N.C’s 115 local school districts. | • Analysis of Strategic Plan Project |
| 4. | Candidates will create a network to link problems of practice across school districts. | • Development of Worklearn group as a Virtual Studio |
| 5. | Candidates will develop leadership knowledge, skills, and dispositions needed to direct strategic improvement in educational organizations by interviewing planning leaders to assess planning processes and using tools of design thinking as demonstrated in class presentations and work in the field. | • Discussions in class with presenters from various districts |
| 6. | Candidates will identify a professional goal and use planning tools to plan how to achieve desired status, related to learning goal. | • Professional Growth Goal Project |

**Attendance**

Doctoral candidates are expected to maintain regular attendance in both weekly virtual class sessions as well as monthly face-to-face meetings. Any candidate who misses **more than one complete monthly face-to-face session or two virtual weekly sessions** will be asked to drop the course or may be dropped by the course instructor.

**Disabilities**

Doctoral candidates who require academic accommodations due to a diagnosed disability must submit the appropriate documentation to the Coordinator for Disability Support, 405 Smith Library. Please inform them of your need for accommodations at the beginning of the semester. Accommodations are not retroactive.
“best” examples, or exemplars, as strategic plans templates and formats are different across organizations.

ASSIGNMENT #1: Evaluation of Strategic Plans in Education

Directions to the candidate: The strategic planning process and ultimate product (the strategic plan itself) vary from organization to organization, but there are some common elements found across the strategic planning processes and strategic plans. To delve deeper into strategic planning, let’s study the products of the planning process—some strategic plans.

A. Meet in teams to discuss features of and to identify components of the strategic plan—NC Guide to Strengthening Public Schools. (NCSSA) January 2015.

B. Then, identify the missing, present, very visible elements of each plan, using the rubric found in Haiku. Then, identify the missing, present, very visible elements of each plan, using the rubric below:

<table>
<thead>
<tr>
<th>STRATEGIC PLAN ANALYSIS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of Organization:</td>
</tr>
<tr>
<td><strong>Element</strong></td>
</tr>
<tr>
<td>Organization history</td>
</tr>
<tr>
<td>Organization of published document</td>
</tr>
<tr>
<td>Vision</td>
</tr>
<tr>
<td>Mission</td>
</tr>
<tr>
<td>Rationale for plan and/or strategies in plan</td>
</tr>
<tr>
<td>Goals</td>
</tr>
<tr>
<td>Strategies aligned to each goal</td>
</tr>
<tr>
<td>Benchmarks identified</td>
</tr>
<tr>
<td>Resources needed to achieve goals</td>
</tr>
<tr>
<td>Budget</td>
</tr>
<tr>
<td>Timeline</td>
</tr>
<tr>
<td>Person Responsible for goal/strategy</td>
</tr>
<tr>
<td>Action plans to achieve strategies</td>
</tr>
<tr>
<td>Feasibility of strategies</td>
</tr>
<tr>
<td>Consistent format of strategic plan</td>
</tr>
<tr>
<td>Executive Summary</td>
</tr>
<tr>
<td>Identification of planning team</td>
</tr>
<tr>
<td>Explanation of Planning Process</td>
</tr>
<tr>
<td>Monitoring Process for Implementation</td>
</tr>
<tr>
<td>Process for modifying goals, strategies</td>
</tr>
<tr>
<td>Summary</td>
</tr>
</tbody>
</table>

B. The next assignment requires each team to analyze four strategic plans currently in use by public school districts in NC. The team will develop a wiki to portray common strengths and weaknesses OBSERVED ACROSS THE FOUR PLANS YOUR TEAM EVALUATED. Based on your summative evaluation of the plan, make sure to include evidence of how the plan will lead to improvement. Include the four rubrics in your wiki. Add two or three resources that illustrate how strategic planning is a leadership function in education. Dr. Tony Watlington from GCS will be in class in March to explain the strategic planning process used in GCS.

Professor’s Evaluation of ASSIGNMENT #1: (worth 20 points) (due March 24)
**ELEMENTS** | **Emerging (0-2)** | **Proficient (3-4)** | **Accomplished (5)** | **SCORE**
---|---|---|---|---
Analyzes components of strategic plan (using list in assignment) | Indicates presence, or lack thereof, of some components in strategic plan analysis rubric | Indicates presence, or lack thereof, of all components in strategic plan analysis rubric | Indicates presence, or lack thereof, of all components in strategic plan analysis rubric, as well as additional components commonly found in strategic plans |
Understands how a plan relates to improvement. i.e., problem solving | Is unable to demonstrate how strategic plan relates to improvement. i.e., problem solving | Is able to demonstrate how strategic plan relates to improvement. i.e., problem solving | Is able to demonstrate how strategic plan relates to improvement. i.e., problem solving, and makes suggestions for improvement |
Develops a wiki to illustrate evidence of weak and effective practices in a strategic plan | Is unable to develop a wiki to illustrate evidence of weak and effective practices in a strategic plan | Is able to develop a wiki to illustrate evidence of weak and effective practices in a strategic plan | Is able to develop a wiki to illustrate evidence of weak and effective practices in a strategic plan and relates these practices to the process of planning |
Demonstrates evidence of knowledge and understanding of strategic planning as a leadership function in education | Does not add resources to wiki that help illustrate how strategic planning is a leadership function | Adds resources to wiki that help illustrate how strategic planning is a leadership function | Adds resources from his/her district to wiki that help illustrate how strategic planning is a leadership function |

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**ASSIGNMENT #2** - Professional Growth Plan and the Bone Diagram (Due March 15) (worth 20 points) You may study an example of this tool in Hall, M.J. (2014). Designing workLearn networks: Making magic happen with your profession. Lake Placid, NY: Aviva.

**RATIONALE:** The EdD Program is a journey of growth. We are always in a state of becoming better, growing through life. In EDU 7171, you identified a professional goal you wanted to focus on during this second semester of the EdD Program. We will use a common strategic planning tool, the bone diagram, to help you clarify your current and desired state of being as it relates to your professional learning.

Directions to candidate: First, identify your professional learning goal. Make sure it is worded in a smart goal format. Then, develop a bone diagram to clarify present and desired state related to your own professional learning.

Second, identify your current state, your current point of growth related to your learning goal. Be brief. Maybe 5 bullet points that describe current learning state related to your goal.

Third, then, do inverse. Maybe 5 bullet points that describe future YOU, once you have developed and grown. What does that YOU look like? Picture the future, desired state. Be brief.

Fourthly, identify the forces that drive you to desired state. What compels you to be better?

Fifthly, identify forces that prevent you from achieving desired state. What constrains you from being better?

These are sometimes referred to as compelling and constraining forces that impact your growth and development.

Lastly, identify 2-3 strategies to help you achieve desired state. Submit one-page document (bone diagram with professional learning goal, current state, future state, compelling and constraining forces, and strategies).
<table>
<thead>
<tr>
<th>ELEMENTS</th>
<th>Emerging (0-1)</th>
<th>Proficient (2-4)</th>
<th>Accomplished (5)</th>
<th>SCORE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional goal and strategies</td>
<td>Goal and strategies to achieve goal are not clear and/or feasible.</td>
<td>Goal and strategies to achieve goal are clear and/or feasible.</td>
<td>Goal and strategies to achieve goal are clear and/or feasible, with a checkpoint identified for monitoring progress towards goal.</td>
<td></td>
</tr>
<tr>
<td>Description of current state/future status using bone diagram</td>
<td>Current and future status are not clear and/or fully developed.</td>
<td>Current and future status are clear and/or fully developed.</td>
<td>Current and future status are clear and fully developed, with data to support current status.</td>
<td></td>
</tr>
<tr>
<td>Description of compelling forces impacting professional growth using bone diagram</td>
<td>Compelling forces are not clear and/or fully developed.</td>
<td>Compelling forces are not clear and/or fully developed.</td>
<td>Compelling forces are clear and fully developed.</td>
<td></td>
</tr>
<tr>
<td>Description of constraining forces impacting professional growth using bone diagram</td>
<td>Compelling forces are not clear and/or fully developed.</td>
<td>Constraining forces are clear and/or fully developed.</td>
<td>Constraining forces are clear and fully developed.</td>
<td></td>
</tr>
</tbody>
</table>

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ASSIGNMENT #3: Strategic Plan (Due April 7) (Worth 50 points)

To improve and to conduct our work, we often utilize strategic plans to guide our work and to especially make the organization better. We “problem find” when we study data, current practice, performance, and trends. We identify problems and design plans to address them. Let’s problem solve!!

Cohort III will work on three Problems of Practice (PoP). To do so, I have divided the cohort into three teams.

1. The Journeymen (Onboarding New Administrators)
2. Purple Passion (Assessing District Culture to Improve the Way we Work)
2. The U and Motley Gaggle (Networking with WCU, ECU, and HPU: The Virtual Studio)

<table>
<thead>
<tr>
<th>ELEMENTS</th>
<th>Emerging (0-3)</th>
<th>Proficient (4-8)</th>
<th>Accomplished (9-10)</th>
<th>SCORE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strategic plan development</td>
<td>Plan is sparse, lacking vision, mission, goals, strategies &amp; other specific components to make it ready for implementation</td>
<td>Plan is adequate, with vision, mission, goals, strategies &amp; other specific components to make it ready for implementation</td>
<td>Plan is compelling with vision, mission, goals, strategies &amp; other specific components to make it ready for implementation</td>
<td></td>
</tr>
<tr>
<td>Strategic plan format</td>
<td>Format is not user</td>
<td>Format is user friendly</td>
<td>Format is user-friendly and</td>
<td></td>
</tr>
</tbody>
</table>
friendly for plan implementation

Process of planning is not documented

Product does not demonstrate goal(s) achievement

Process of planning is documented by action and contributors in Gantt chart format

Product does demonstrate goal(s) achievement

Process of planning is documented by action and contributors in Gantt chart format with instructions on how to keep the team and professor informed of progress

Product does demonstrate goal(s) achievement complete with executive brief on next steps and methods to monitor progress of implementation

Assignment #4: Participation in class and webex activities: (10 points)

Grading Scale for Overall Course Grade

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>90-100</td>
<td>80-89</td>
<td>70-79</td>
<td>Below 70</td>
</tr>
</tbody>
</table>

Doctoral candidates must maintain a cumulative GPA of 3.0 or higher to progress in the graduate program. In accordance to Graduate School policy, no plus or minus letter grades are awarded in any advanced courses. Any grade of C or lower results in academic probation. Two or more grades of C or lower or a grade of F earned in a graduate level course results in dismissal from the Graduate School at High Point University.

HONOR CODE

All candidates in both undergraduate and graduate programs are honor-bound to refrain from conduct which is unbecoming of High Point University and which brings discredit to the student and/or the University. All candidates are expected to know and follow the University Honor Code and the School of Educations Code of Ethical and Professional Behaviors. This Code of Conduct can be found on the School of Education’s website as well as in the Appendix of the Doctoral Graduate Handbook.

COURSE CALENDAR

The Professor has option to modify calendar, based on student input and feedback. There will likely be additions, but minimal changes to the following topics.

<table>
<thead>
<tr>
<th>Date</th>
<th>Topics</th>
<th>Assignments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Virtual Activity/ Webex #1 Tuesday, Jan. 13: 7:00 pm-9:00 pm</td>
<td>Major Topic: Introduction to course &amp; strategic planning assignments</td>
<td>Review syllabus and assignments.</td>
</tr>
<tr>
<td>Virtual Activity/ Webex #2 Tuesday, Jan. 20: 7:00 pm-9:00pm</td>
<td>Major Topic: Strategic Planning Tools</td>
<td>(webex/activity) Use the bone diagram to portray the current and future state related to professional growth goal. Read: Baldrige’s <em>Education Criteria for Performance Excellence</em> (pp.1-12 and glossary) found at <a href="http://www.nist.gov/baldrige/enter/education.cfm">http://www.nist.gov/baldrige/enter/education.cfm</a></td>
</tr>
</tbody>
</table>
| **Face-to-Face Class #1**  
*Jan. 23-24* | Major Topics: Baldrige Continuous Improvement Model as Used in Iredell-Statesville District; Interview Dr. Melanie Taylor, guest presenter; Design Thinking as Approach to Problem Solving and Strategic Planning; Interview Dr. MJ Hall and Amy Davis, Guest Presenters. | Study Baldrige’s Education Criteria for Performance Excellence (pp.1-12 and glossary)  
Frame questions to ask guest speaker (Melanie Taylor) about Iredell-Statesville’s implementation of Baldrige model.  
Plan to ask questions about Design Thinking for Educations; (see resources in Haiku);  
Read “What is a worklearn network?” |
| **Virtual Activity/Webex #3**  
*Tuesday, Jan. 27: 7:00 pm-9:00pm* | Major Topic: Strategic Planning Tools: Understanding the Dynamics that Undergird Strategic Planning—Project Management | |
| **Virtual Activity/Webex #4**  
*Tuesday, Feb.3 : 7:00 pm-9:00pm* | Professional Learning Goal: Bone Diagram | (webex/activity) Develop the Gantt chart to portray your team’s plan to develop and implement strategic plan. |
| **Face-to-Face Class #2**  
*Feb. 6 and Feb. 7  
Feb. 7-Meet in Rowan/Salisbury District Office* | Major Topic: Ways to conceptualize strategic planning in school districts; Systems thinking approach to planning;  
Bring card set—habits of systems thinkers—to class. | |
| **Virtual Activity/Webex #5**  
*Tuesday, Feb.10: 7:00 pm-9:00pm* | Major Topic: Evaluation and features of current strategic plans in practice in NC; NCSSA; DPI, and YOUR School District. | (webex/online) Post on padlet the strong features of the plans you reviewed. |
| **Virtual Activity/Webex #6**  
*Tuesday, Feb. 17: 7:00 pm-9:00pm* | Major Topic: Planning tools; RBT Activity | (webex/online) Post on padlet the application of RBT. |
| **Virtual Activity/Webex #7**  
*Tuesday, March 3: 7:00 pm-9:00pm* | Major Topic: Planning tools; polling for data collection purposes | (webex/online) Administer poll and analyze data concerning home work policy; |
| **Virtual Activity/Webex #8**  
*Tuesday, March 10: 7:00 pm-9:00pm* | Major Topic: Planning tools; utility of polling in leadership. | (webex/online) Continue polling activity. |
| **Face-to-Face Class #3**  
*March 13-14* | Major Topic: District planning | Plan interview questions for guest presenter |
| **March 15** |  | Individual Growth Plan Project Due |
| **Virtual Activity/Webex #9**  
*Tuesday, March 17: 7:00 pm-9:00pm* | Major Topic: Review progress (Gantt charts) of the teams’ strategic planning process. | Progress report on development and implementation of strategic plan. |
| **Virtual Activity/Webex #10**  
*Tuesday, March 24: 7:00 pm-9:00pm* | Major Topic: Analysis of Strategic Plans Due | Team’s Strategic Plan Analysis Project |
| **Face-to-Face Class #4**  
*March 27-28* | Major Topic: Revisiting Design Thinking; Dr. MJ Hall will return for deeper development of design thinking. | Read “What is a worklearn network?” |
<table>
<thead>
<tr>
<th>Week of March 30-April 5</th>
<th><strong>Major Topic: Strategic Plan Project</strong></th>
<th>Strategic Plan Project Due April 7</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Face-to-Face # 5)</td>
<td>Major topics: Components of the Strategic Plan Required in Doctoral Study; Review of Strategic Plans and Leadership Roles in Making Strategic Planning Work</td>
<td>Debrief course learning goals in class.</td>
</tr>
<tr>
<td>April 24-25</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>