



# 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](http://www.onstrategyhq.com)

## QUICK OVERVIEW: NEXT STEPS IN THE PROCESS

| Planning Task   | Time Frame  |
|---|---|
| <b>1. 2013-14 End of Year Check-Out:</b> Final Status Update and EOY Progress Reports for the 2013-14 School Year. <ul style="list-style-type: none"><li>Note: Saving/Archiving 2013-14 Reports is very important before making live changes to your online plan.</li></ul> | <b>By August 15th</b>                             |
| <b>2. 2014-15 School Plan:</b> Use the OnStrategy Platform to develop/refresh your annual plan for the 2014-15 School Year (Add/Revise/Delete to develop a current plan).   | <b>September</b>                                  |
| <b>3. Progress Reporting:</b> Updating progress throughout the year using the tracking and implementation features of OnStrategy.   | <b>Monthly Process;<br/>beginning<br/>October</b> |

## 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](http://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](mailto: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 <b>Performance</b> → <b>Track Performance</b>  |  |
| 2.  | Click on <b>Edit</b> (pencil icon) to update status on each goal assigned to you   |  |
| 3.  | Click the <b>Expanded View</b> button which allows for the capability to view/revise dates   |  |
| 4.  | Go to the <b>“What’s Your Progress” Drop Down</b> <ul style="list-style-type: none"> <li>If on Target/Complete: <b>Select “I’m Done”</b> to close out the Year.</li> <li>If <i>Off-Target</i> (less than 50% complete): Select “I’m Behind” or “I’m Late” to reflect accurate status.</li> </ul>   |  |
| 5.  | Go to <b>Progress YTD</b> and indicate your % completion (should be 90-100% if on target/complete for the year) <ul style="list-style-type: none"> <li>For KPI’s (quantitative measures/targets) you will need to enter an actual numeric metric rather than % complete.</li> <li>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.</li> </ul>  |  |
|   | <ul style="list-style-type: none"> <li>When updated accurately, goals that are Complete/On Target for 2013-14 will trigger a green, check-mark with 90-100% completion.</li> <li>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).</li> </ul>  |  |
| <b>Troubleshooting: <i>Getting an Inaccurate Red Light?</i></b> |  |  |
|   | <ul style="list-style-type: none"> <li>For certain scenarios, you will need to modify the end date to reflect accurate status.</li> <li><i>Why?</i> We are closing out the year in August 2014 for a plan with end dates of 6/30/14. If a goal is NOT marked 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.</li> </ul>  |  |
| 6.  | <b>Modify the End Date of the Goal:</b> <ul style="list-style-type: none"> <li>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.</li> </ul>   |  |
| 7.  | <b>Comments on Status:</b> 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.   |  |
| 8.  | <b>Save Reports:</b> Once all goals have been updated, go to <b>Reports, School/Department Reports</b> → <b>Performance Reports</b> → <b>Action Plan</b> . Select your School/Department name from the <u>drop-down</u> menu and download/save the <b>Action Plan Report</b> for your records. <i>This is your Final Progress Report for 2013-14.</i> <ul style="list-style-type: none"> <li>Note: Natalie Bates will download all KPBSD School Action Plan Reports on <u>August 15<sup>th</sup></u>. These Reports will be shared on School Web Sites as a reflection of last year’s progress.</li> </ul> |  |



## 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 <b>Plan</b> → <b>Setup Goals</b> to revise and add new goals to your plan.   |
| 2. | <p><b>Revise Goals that Carry Over:</b> If a goal is continuous or carrying over to the next School Year, revise the language accordingly and:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Change the End Date:</b> Update to reflect the new planning year. <i>*An end date that is not updated will trigger the past-due/critical icon in the progress report.</i></li> <li><input type="checkbox"/> <b>Start Date:</b> Keep start-date the same if you want to show plan <i>continuity</i> from the previous year. Or, based on your judgment, change date to indicate start of the new school year.</li> <li><input type="checkbox"/> <b>Revise Target:</b> Update the target field to reflect new milestones/metrics</li> </ul>                                  |
| 3. | <p><b>Add New Goals:</b> Add any <i>new</i> goals that have been developed for the school year. Be sure to indicate start/end date accordingly.</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Review criteria for setting SMART goals; this is the opportunity to clean up and refine your plan.</li> </ul>  |
| 4. | <p><b>Delete Past/Accomplished Goals:</b> Remove any 2013-14 goals that have either been completed, or do not carry over into this year's plan.</p> <p><b>*Note about Deleting:</b> 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.'</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Review Supporting Actions:</b> When you delete a Goal/Objective, the supporting action items <i>will also be deleted</i>. Review them first - if supporting items are active and relevant, the parents goal should probably remain in the plan and be revised accordingly.</li> </ul>  |
| 5. | <p><b>Review/Clear out Status:</b> Go to <b>Performance</b> → <b>Track Progress</b> to review status of carry-over goals and clean up as relevant.</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Clear Status:</b> 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 "<u>not started</u>" so that it can be updated accordingly for the first progress report of the new school year.</li> <li><input type="checkbox"/> <b>Review Status/Comments:</b> 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.</li> </ul> |
| 6. | <b>Reports:</b> Go to <b>Reports</b> → <b>School/Department Reports</b> → <b>Plan Reports</b> 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.

|   |  |
|---|--|
| <p>1. Go to the <b>Plan Section</b>→<b>Setup Goals</b> and click on <b>Implementation</b>.</p>  |  |
| <p>2. Set upcoming milestone planning dates using the Review Calendar.</p>  |  |
| <p>3. Set the <b>Reminder</b> 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.</p> <p><b>Note:</b> 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.</p> |  |

#### 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](mailto:SDusek@KPBSD.k12.ak.us)) or Natalie Bates ([NBates@KPBSD.k12.ak.us](mailto:NBates@KPBSD.k12.ak.us)) with questions related to the Planning Process. Contact **OnStrategy** ([admin@onstrategyhq.com](mailto:admin@onstrategyhq.com)) with specific questions related the online application. Live Chat is available Mon-Friday.

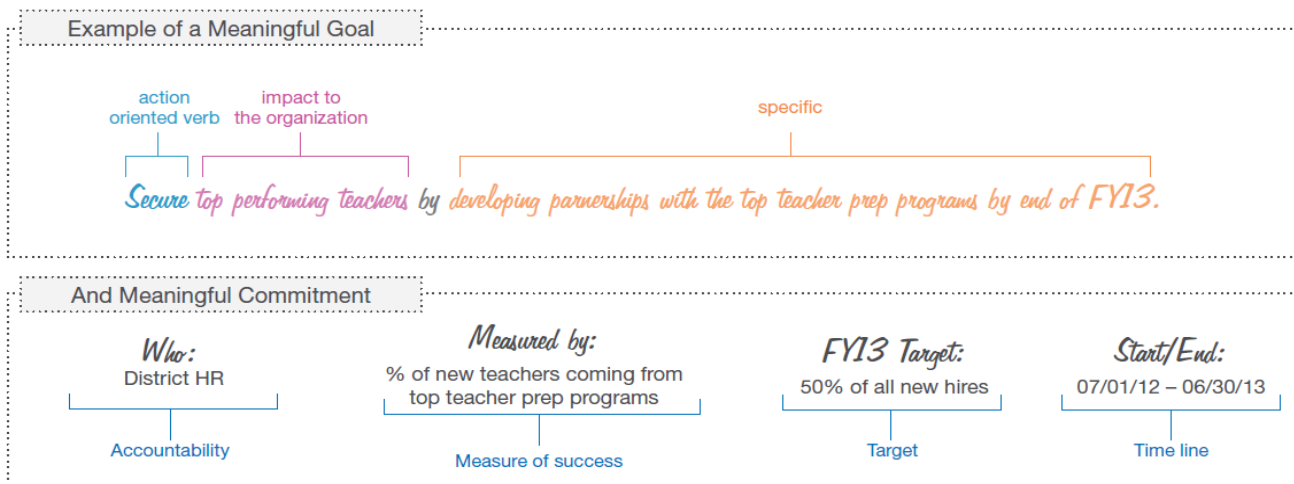
# DEVELOPING SMART & MEANINGFUL GOALS

## 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.
- ✓ **Measurable:** 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.



## 1. Getting started

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

Please enter a valid e-mail and password.

**Email address**

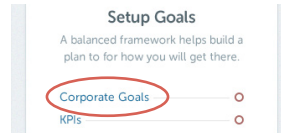
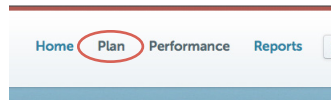
**Password**

**Log In** [Forgot Password?](#)

## 2. Add/revise/update your goals & actions

- Go to Plan > Goals**



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

**Goals, Initiatives and Tasks**

Strategic Objectives on two lines | Organization Goals | Department Goals | Team Members Goals | Team Members Actions

|           |       |   |
|-----------|-------|---|
| Financial | 1.1.2 | Implement marketing campaign to draw in new markets.      |
|           | 2.2.3 | Complete a competitive pricing analysis.                  |
|           | 3.2.1 | Increase the overall traffic to website by 20%.           |
|           | 4.1.2 | Create sales copy for new service packages.               |
|           | 2.2.3 | Increase the number of leads who become customers to 24%. |

People | Process | Customers

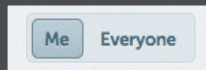
Goal Description: 5.21 Marketing Department Goal

- = Add Item
- = Delete Item
- = 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:

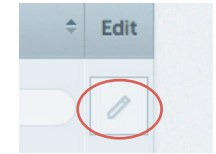
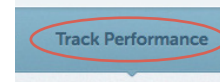
- District Focus Area (District only)
  - District Goal (District only)
    - Site/Department Goal (Director or Principal)
      - Team Member Goal (Team member only)
        - Team Member Action Goal (Team member only)

**Tip:** Don't see your whole plan? Click on the "All" button on the top left of the screen.



## 3. Update your status & track your progress

- Go to Performance > Track Performance**
- Update Your Progress when you see a pencil**



- 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

- 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

- Reports > District or School All Up Report**  
Download your Full Plan with Status to see item and progress.
- Functional Report for Directors/Principals & Team Members:** Download your Action Plan report to view actions, status and comments.