

Professional Development Activity on Developing Foundational Statements

This activity helps team members develop foundational statements for their school or district (assuming that none of these statements are already in place). If a school district already has some or all of its foundational statements in place, this activity allows teams to review their existing statements for possible inclusion in the new draft. Teams may use the activity as a way to discover their district's unique culture.

Time Frame

It is not uncommon for this activity to take a minimum of three or four sessions, with each session lasting two and a half to three hours. Even if activities are merely affirming the existing foundational statements, ample time should be provided to review and reflect on the overall discussion and dialogue. Remember to schedule the exercise at a time that ensures all participants can attend. Furthermore, try to have the sessions no more than two weeks apart. This helps ensure continuity and prevents any loss of task momentum, while preventing the exercise from turning into a never-ending workshop.

Materials

Teams need a facilitator, a chalkboard or whiteboard, markers, pens or pencils, and paper.

Process

There are several ways to conduct this activity, but engaging an outside consultant to facilitate the process is highly recommended. An outside facilitator can help remove mental roadblocks and keep everyone focused in each session. The state school board association is a good resource for these types of workshops, but there are a number of private consultants who are familiar with this type of activity as well.

When completing this task, remember that there is no set length for foundational statements, and that they may vary as needed for local district buy-in. For example, in some districts, longer vision statements may capture the essence of the district's dream and how it intends to accomplish it, which implicitly includes core values and beliefs. In other districts, the vision and mission statements simply do not express everything that is necessary, and core values and belief statements are essential to communicate all that is distinctive to the district. The process should begin with identifying core values and beliefs, then move to crafting mission and vision statements.

Core Values and Beliefs

Teams should identify their core values and beliefs by doing the following.

1. Every participant submits a list of value and belief statements before the first meeting (for example, "I believe the district's curriculum . . .," or "I value the district's personnel because . . ."). Alternatively, the facilitator can create eight to ten value and belief prompts that team members would complete. They should contribute one value or belief statement reflecting categories such as curriculum, facilities, student achievement, community relations, personnel, extracurricular activities, finance, and so on.

2. The facilitator compiles a master list of every participant's statements anonymously by category and then prepares to distribute that list at the first meeting.
3. At the first meeting the entire group assesses each statement to determine whether it represents a core value or belief. They determine this by asking, "Does the statement express a belief or value highly esteemed by the district, that is also viewed as an uncompromising statement or belief?" If "yes," keep it; if "no," discard it.
 - ◆ The group interaction in this exercise will likely be tentative or even uncomfortable at the beginning, since this exercise requires judging individual contributions.
 - ◆ Consequently, it is important for the facilitator to stress that participants judge statements not on whether they are good or bad, or right or wrong, but rather by deciding what is most important.
 - ◆ Some statements will need revising and perhaps combining with portions of other statements to form value and belief statements that are reflective of the group's understanding about education in the local district.
4. After reducing this list, the group develops the mission and vision statements. There is no specific number of value or belief statements required, but each should be easily defended as core to the district—that it is held in the highest regard and/or that it will not be compromised. It is a great practice to quickly review the value and belief statements at the start of each session. This not only helps to ensure that everyone is completely satisfied with these statements, it also helps to ingrain them in the group members' minds. It is not uncommon that these statements continue to evolve as the group goes through the remaining workshops and in response to everyone's understanding and expectation of the values and beliefs he or she identifies as *core*.

Mission Statements

The next team task is developing the mission statement. The goal is to develop a short, concise statement of purpose. The mission statement should be easily committed to memory and should clearly express *why* everyone in the school district operates as he or she does daily.

1. The facilitator divides the group into small teams. None should have more than six people, and school board members should be divided as equally between the total number of teams as possible.
2. The facilitator asks each group to move to a separate breakout area to begin its discussion and development of a mission statement or mission statements to recommend to the whole group.
3. Once each small team is finished (usually after forty-five minutes to an hour), the facilitator brings the entire group back together and allows each team to share its statements. There may be a statement or two that are immediately preferred, or there may be a need to combine portions of two or more statements.
4. Invite questions from members who need clarity. Encourage complete understanding of the statement's intent. However, discourage judgmental questions or comments about the statement.

This activity is usually accomplished in one session, paving the way to the final workshop session for developing the vision statement.

Vision Statements

The goal of this session is to create a vision statement that enables each team member to visualize a future, realistic, version of the school district. A vision statement can be powerful, but it should never be overly positive or utopian. Optimism tempered with realism is always preferable.

The method for developing vision statements is the same as for developing mission statements. Using the same teams from the mission statements' portion, consider the following.

1. The facilitator charges each team to develop a narrative statement that defines the future state of the school district using the criteria of a vision statement discussed earlier in this chapter.
2. After forty-five minutes to an hour, the whole team reassembles and each small-group facilitator shares its vision statement. Since narrative vision statements are much longer than the mission statements, usually comprising a paragraph or two, it is helpful for the group to identify the components in each vision statement that are most meaningful.
3. End the day's session.

In a second session:

1. The facilitator helps the entire team create its overall vision statement by combining the most preferred or meaningful elements from the individual group-created statements. If one contribution is used as a baseline statement, the facilitator should then incorporate the best elements from other statements, making sure not to compromise the readability. The same process is used even if the team begins by taking statements from each small team and constructing an entirely new paragraph.
2. Once these statements are completed and the entire group is satisfied, the group should work together to develop working goals. The most meaningful working goals describe the necessary activities required to reach the desirable future state of the school district. Using the vision statement to identify goals helps ensure the district's pursuit of the right, best things, and responsibility allocating the limited resources of the school district must apply to this effort.
3. After identifying working goals, the administrative team and superintendent are responsible for taking these high-level goals and building strategies, action plans, and timetables for goal attainment.
4. The administrative team and superintendent devise a reporting mechanism and frequency for keeping the school board apprised of goal progress. The foundational statements can provide focus and help to ensure that everyone is in lockstep with each other as he or she sets about to engage in the right, best activities to bring that desirable future into reality.
5. Once the statements are completed, it is recommended that they be prominently displayed in each building throughout the district, as well as on the district's website and social media sites. Additionally, it is recommended that the mission statement be added to the district's letterhead. Keeping foundational statements readily visible is an important first step to building the district culture around these statements.

Results

Participation in this activity, even with multiple sessions, has the potential to pay huge dividends in the board, administrator, and administrative team relationship. Within this activity alone, there is a tremendous opportunity for a dialogue of what is most important to a school district as each small group within the team frames the perspective. In addition, it clarifies who bears the greater responsibility for goal attainment. School boards authorize and empower, and the administration delivers. However, the mutual respect for each other's role in this critical exercise does not alienate one from the other, but serves to strengthen the school board–superintendent team. Further, it emphasizes the reliance each has for the other. To ensure success there must be mutual respect, for neither can succeed completely without the other. Teams succeed *together*.