Meaningful Strategic Planning and Aligning Our Data Use with Our Vision

From the *Transformative Leader's Roadmap for Facilitating School Excellence*
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In most cases, schools engage in the process of formal strategic planning because it has been required or expected of them. And too often it represents a somewhat disparate effort; disconnected from the more organic business of becoming a more effective school. The byproduct of this is a lot of work that results in a process that is not as meaningful as it could be and a product that is less impactful than it might be. However, your strategic planning has the potential to be a powerful and highly useful component to your overall improvement process.

To achieve optimal results, our goal should be to align the processes and guiding references of our large-scale ongoing processes – strategic planning, vision development, teacher and staff evaluation, professional development, school promotion and school improvement generally. This effort starts with the setting the expectation that coherence and alignment are priority R's then determining where these large processes are currently misaligned. Our guiding question might be "Does the way this process is being done today encourage the growth of the school as reflected in our vision and mission." Our ability to move up the roadmap will be related to our level of process *coherence* - the integrity of the fundamental school mechanism, and our level of *capacity* – the way that these mechanisms function to promote our desired results, and expand our ability to be successful, as we have defined it.

Our strategic planning process should be both integrated with the other organizational processes as well as reflecting the explicit purpose of moving our school up the roadmap to where we want to go. Therefore, in the end, we will want to assess its efficacy by how well it meets the following five standards:

1. It is aligned to our vision and integrated into our other essential processes and data-driven decision making.
2. It acts to solve real problems in a meaningful way rather than just addressing symptoms.
3. It acts to cultivate a deeper sense of our mission and vision.
4. It promotes a more meaningful use of data and understanding of what is actually happening at the school.
5. It supports our process of moving closer to our desired location on the school effectiveness roadmap.

There a several systems for developing strategic plans. They all have their benefits, but they can produce vastly different results. I recommend the four stage R-X-O (references/values -> X/actions -> O/outcomes) process. It is the only process that I have observed that satisfies all five of the criteria above. Below the R-X-O based model is contrasted to the more traditional (Outcome-> action) model, and then explained in detail. See Figure 2.D from Chapter 2 of TLR to gain a clearer understanding of each of the R-X-O factors.

Figure 2.D: Table of Definitions of the three Inter-related variables – R/References, X/Actions, and O/Outcomes

	R or Reference	X or Action/Practice	O or Outcome
In a phrase	We teach (or lead) who we R	X = What we Do	O's are our Results
Contents	• Values • Conditioning • Perceptions • Internal Picture of "Good School" • Intuition • Skills and Knowledge • Beliefs and attitudes • Personal narratives • Identities • And everything contained in the unconscious	• School staff Behaviors in general • Pedagogical practices • Applied Policy • Interactions • Routines and patterns of behavior • Communication • And all the unconscious modeling and messages that we send	• Student Achievement (using whatever measure) • Student behavior • Learning levels and forms by students and staff • Motivation levels and forms for students and staff • Disposition and emotional states of students and staff • Incidence of phenomena – i.e., tardiness, absences, violence, substance use, winning teams, • School climate and culture (as experienced)
Definition	We will use the term reference (or R) to refer to everything that is in the minds and nervous systems of the individual or collective organism. The organism can be of any size – individual, classroom, school, or district. The R's are the DNA at the school.	We will use the term X to describe what the educators (or the members of any organization) do. Again, we need a larger term for all the active things that are done intentionally or unintentionally during a school day.	We will use the term O to represent all the countless specific outcomes and results of actions that we care about and that are meaningful to us in schools. The O's are the symptoms of the health of the ecosystem.
Rationale	So why the term reference? First, we need a term that is inclusive of all the kinds of mental processing listed above – the thinking and feeling that ultimately guides our actions. To deal with each of these mental processes separately, while potentially useful, would be create complexity that would not serve our purposes here.	While we typically spend a great deal of time thinking about this very area, most educators underestimate is influence. We will demonstrate in the next few chapters why X's predict almost everything else especially the O or Outcomes. The primary task of school improvement will be to encourage more high-quality X's and fewer low quality X's.	The outcomes that result at the school or organization will tell us a lot. If we want to know what we are doing, we need to look at what we are getting. If our R's are defined by a desire for quality, those R's will guide X's, and the result will likely present as quality O's.

Contrasting Two Different Approaches to Strategic Planning

We could contrast an R->X->O roadmap destination-based process with a more traditional 0->X approach. This traditional and commonly used approach to strategic planning begins with an examination of various outcome measures. In many cases the outcomes measures could be best characterized as symptoms. Therefore, the starting point typically consists of collecting the current outcome data for such things as scores, rates, survey results, etc. Then target or priority areas are selected based on data evidence that suggests a less than desirable condition. Then programs or action solutions are identified for each target item. Finally, goals are set for each and action steps are outlined. SMART goals are usually recommended – this acronym stands for Specific, Measurable, Accountable, Resources, and Timeline Specific.

This approach is sensible and potentially effective but has a few fundamental problems. First, it tends to lend itself to the solving of symptoms rather than real problems. The reason is that there is no mechanism within this logic to put data into a context that would differentiate the two ideas. Second, it does not imply a broader vision or "meta" destination for the process. Third, it is by nature reactive rather than proactive. And finally, it can lead to disconnected and incoherent solutions as a result of seeing problems in isolation and solutions existent out of a larger context. This model is a good way to generate improvement work, but not a very effective means of encouraging meaningful change.

Therefore, if our desire it to engage in a meaningful process of strategic planning, I would recommend any school consider using the alternative vision-driven R-X-0 four stage strategic planning process outlined in Figure 9.x. This process successfully addresses the four problems that are inherent in the traditional model and satisfies the five criteria for an effective process listed above. By its nature it brings an increased level of clarity and depth to the effort. The R-X-O process consists of four stages:

1. Articulate the desired roadmap location, using a wide range of data points representing a series of R's/references, X's/actions and O's/outcomes.
2. Assess the current roadmap location using a parallel set of data points
3. Determine the gap between the desired and current location that reflects the school's real problem areas, the priorities areas of focus, and key indicators in the data that would imply growth.
4. Select a manageable number of the priority growth areas and translate them into macro goals. Then for each macro goal develop as many micro operational objectives as necessary to represent the actions that would be necessary to bridge the gap in this area. Write micro objectives in SMART goal format.

Step One: Articulate the Desired School Effectiveness Roadmap Location
The place to start in our strategic planning process is to bring together a team of individuals who represent a broad set of perspectives and job descriptions, but all share a commitment to the schools vision, possess an interest in exploring data and accept their role as influencers. It is acceptable if all or some of the members are also engaged with the vision, climate, or site governance processes. If it is possible you will want a team that is able to take the effort from beginning to the end – brainstorming, data analysis, goal setting, facilitating the action plan, and then ultimately translating it into professional development. Done properly, it represents a good deal of work and dedication. Therefore, if possible, you will want a few of the best teachers at the school on the team and they should be compensated in some way. A critical frame of mind for the team is to recognize the scale and importance of the task, and not assume it can be done quickly or with short-cuts. So, the Chair of the committee needs to keep the team on task and on pace. A fine balance needs to be struck between a need for depth of analysis and respecting all perspectives and along with the need to come to some consensus and produce tangible results.

The first task in the process will likely be the most time-consuming and challenging, but it will set the tone and define the capacity of the remaining steps. At this first stage, the team needs to articulate the desired school destination. This means the members of the team will need to be versed in the basics of the school effectiveness roadmap logic. The more concrete and operational this destination can be developed the better. Like the teacher planning for all the aspects or a class that has not happened yet, the more that this destination can be conceptualized and explained in specific, measurable, behavioral and practical terms the more likely it will be actualized. To facilitate the process of operationalizing our desired location, it will

be useful to identify target qualities for each of the three levels of school phenomenon – R's, X's and O's. So, let's examine key considerations and guiding questions for each of these areas.

R's/References. This activity will likely take the most amount of imagination. But it should be an energizing process. The group will want to inhabit the minds of those in the school when it has attained its goal location on the roadmap. The job will be to articulate the operating references at the school when it gets to this destination. It will work best to conceive and state these in the present tense – as if they have already occurred and are happening now. Be sure all members of the group are familiar with what you are talking about when the term R/reference is used. You can substitute values and beliefs if need be, but the domain of references will include values, narratives, beliefs, conditioned patterns, mindsets, fears, desires, biases, and all other internal processes. Therefore, try to stick with references to capture it all. Here are a series of guiding questions to support your process of brainstorming:
- ✓ What are the guiding values at the school?
- ✓ What are the three main guiding internal questions that focus the actions at the school?
- ✓ What does it feel like to work at the school?
- ✓ What are the narratives (Ch. 7) for and pervasive perceptions of the school?
- ✓ What can you say about the existence of the qualities of trust (ch.6) at the school?
- ✓ What positive attitudes that will exist that you are able to take for granted?

Brainstorm as many ideas as you can for this area. Then pair your list down to 4-6 primary qualities. Next, include any evidence sources for how one would know these internal processes are happening. Your evidence list for R's will likely be shorter than your list for X's and O's and will likely include what a perceptive person could infer, but can also include R related items on surveys, the internal thoughts that are communicated in various forms by the adults at the school and other sources. Place your lists of qualities and evidence into the Destination R's section of the plan.

X's/Actions. This will be the most important section in your entire plan. Here you will outline the kinds of X's - practices, policies, routines, activities, strategies, programs, processes, personal interactive patterns, etc. that will be common and normal in your desired destination. This will be a great time to incorporate your "things you will see/things we do here" and "things you should not see/things we don't do here" lists (and/or the POS promoting practices or undermining practice list, Ch. 7). The emphasis should be on what happens in the classrooms, but also include all other areas of the school as well as leadership and decision-making practices. Review Ch. 8 for all areas related to the X domain. Here are a few guiding questions to spur your brainstorming process for this area.
- ✓ What will students and visitors see when they walk into the school?
- ✓ What is the norm related to instructional methods?
- ✓ What is the norm related to assessment methods?
- ✓ What is the norm as far as classroom management and discipline?
- ✓ What kinds of pedagogy will be virtually absent from the school?
- ✓ How will faculty and staff be using the professional development process?
- ✓ What policies will have been deemed no longer necessary? And which ones will replace them?
- ✓ What is happening in the area of student life, leadership, service learning, peer mediation, etc.?
- ✓ What is the school doing to promote social and emotional health at the school and why has it been embraced and appreciated?

Again, brainstorm as many ideas as you can here. The list will be long but that is good. Then, synthesize the list down to 5 to 7 items that best represent the desired X's at the new location. It is fine to refer to other reference documents. Next, list the sources of evidence that could be used to assess whether your desired X's are being demonstrated. There should be a substantial list of sources including, surveys, observations, self-report, formal evaluation data, student feedback, and your own anecdotal assessment. Place your lists of actions and evidence into the Destination X's section of the plan.

O's/Outcomes. In the final section of step one of the process, the team will outline the outcomes that one would ideally see at the desired roadmap location. This section should be much easier than the two sections for the R's and X's. You will want to include quantitative measures like test scores, but it will be good to focus on the day to day experience of students, teachers, staff and leaders -what does it feel like in the school at this location? What do people experience (that they may not be experiencing currently)? Here are a series of questions to guide the exercise.
- ✓ What is the emotional state of a typical student on a typical day?
- ✓ What do students learn?
- ✓ What is the climate and culture like in the school?
- ✓ What is the public reputation of the school?
- ✓ How do students grow over their years at the school? and Why do they?
- ✓ What are the indicators of achievement and that you are being successful?
- ✓ What don't you see at the school now as a result of your efforts?
- ✓ What makes you proud to work at this school?

Include all the outcome data measures that you see as meaningful indicators of your progress to this destination. What those are is up to you. You may want to focus on quantitative indicators, or you may want to use mostly qualitative evidence of success. But try to generate as much solid reliable evidence as you can. The SCAI is a very reliable way to judge progress and roadmap location for example. Then, as before, synthesize your list of desired location quality outcome indicators into 4-6, and list all sound and meaningful sources of evidence you could use to assess those indicators (unless the evidence is the indicator itself, as it might be with test score levels for example).

Step Two: Articulate Your Current School Effectiveness Roadmap Location
In this stage of the process we articulate the current state of the school. The work product should be a side-by-side representation of what was created in stage one – outlining R, X and O indictors but for the current school reality. As with the first step related to conceiving the desired roadmap location, in this step, the team will identify indicators and support their assessment as much as possible with evidence in the form of multiple sources of data. This step can be done after or concurrently with the first step, depending on what makes the most sense for the team.

When the first two steps are complete, the team should have developed a parallel set of key-indictors for both the desired state and the current state at the school. Some variation is fine, but the goal is to represent a picture of before and after. The R, X, and O related questions offered in the previous section to spur the brainstorming process can be used for articulating the current state of the school as well. Also, it will likely be that members of the team will recognize items that they feel should be represented on one side when exploring the other side.

As with step one, open discussion and brainstorming should be encouraged early, but eventually the team will need to reduce the list of indictors down to a few, about 4-6 for each domain – R's, X's and O's. The before and after indicators should be reflective of one another but they do not need to be exact. Likewise, the data sources should be similar as well. But you

may determine that you want to work with a data source in the future that is currently not something you collect, or that you want to cease collecting a source of data in the future. This process will be an excellent opportunity to reevaluate your data collection process and sources. The more meaningful your data use process becomes, the more discerning you will become related to the different advantages and disadvantages of various data sources – especially surveys.

Step two is complete when you have a side-by-side picture of where you are currently and what your school would be like at your desired destination – the R's, X's, and O's with evidence for each. Assume that coming to consensus will require commitment to a process of democratic consensus. Yet, ultimately the most ambitious vision and destination conception should take precedence over ideas that do not represent that same level of meaningful progress. And assume the process will require a high degree of EQ, encouragement, boundary setting, and process facilitation. The best ideas should be elevated, not just those of the most senor members or those with the biggest personalities. And it is more than likely that you will need to encourage members to persist in the effort when they do not get fully what they want – managing egos is just part of the process. But in the end these two stages should have produced a lot of energy and excitement about the growth possibilities for the school. The content created in these steps can be recycled with necessary modifications from year to year and will position the team well for the work of the next stage of the strategic planning process.

Step Three: Assessing the Gap Between the Desires and Current Roadmap Location
In this stage of the process, the team will systematically assess the gap between the desired and current roadmap location indicators and evidence that were articulated in steps one and two. The job of the team here is to identify the disparity related to the indicators for where they are and where they want to be and reduce them to a manageable set of priority goals. The number of goals will vary from school to school depending on the current capacity for making improvements and other factors. And it should be noted that the work done in steps one, two and three will be useful generally in the various improvement initiatives the school is undertaking. But for this specific exercise in strategic planning, goals should reflect 1) priority values and areas of focus, 2) mostly real problems as well as symptoms, and 3) highlight points of substantive disparity between the two columns – representing areas of critical concern.
   Priorities. The team should focus on what is most essential for becoming the school that they have conceived in step one. The data will likely reflect similar needs, but in the end, most times, putting energy into what is most important and evokes the most passion will translate into the best results. Recall our earlier discussion, the goal of this process is to be vision driven, meaningful and to translate into a document that inspires and spurs action.
   Real Problems. There can be a tendency to focus on data disparity as the primary take away from the gap analysis. Yet, the result of that can to place too much attention on outcomes and symptoms of problems. So, first, be steadfast in your effort to try to recognize the "real problems" implied by the gap. We might simply ask "Why is there a gap?" and then "Why is that?" repeatedly, as many times as necessary until we get to the root cause. One strategy for avoiding reductionism and too much attention on symptoms will be to select target goals from each domain list – R's, X's, O's. And the domain that should be given the most attention is your articulation of the desired location X indicators.
   Substantive Disparity. The likelihood is that not much about your lists from steps one and two will come as a great surprise, but it will clarify both the conceptual picture as well as the realities at the school gleaned from the data. You will likely see some areas of disparity that are glaring. Use these insights as you identify priority goals.

From this process of gap analysis, you will want to identify a series of macro goal areas. Every element of the gap you have identified is meaningful and should be carried forward in your individual and collective work as leaders, teachers, committee members, PLC members, community partners, etc., but for the purpose of this exercise (and document) you will need to select a few to operationalize more fully and formally. It is okay if they are more general (i.e., we create student centered classrooms), or more specific or quantifiable (i.e., we have a 95% attendance rate). In either case, we will need to operationalize them further.

Step Four: Setting Goals and SMART Objectives to Operationalize Our Action Planning
The final step of the process will be to operationalize our priority goals into actionable objectives, responsibilities and evidence we've been successful. After identifying a few broad areas for improvement in our gap analysis we will want to translate the essence of those ideas into a set of macro goals. These goals should be stated as present tense outcomes and can be general and include abstract terms.

Then for each of these macro goals, we will want to identify sub micro objectives that imply what would be required for the goal to be actualized. We can create as many of these micro objectives as necessary. The goal here is to operationalize our growth process and make our movement toward desired location specific, practical and actionable. Making a parallel to effective classroom planning is instructive here. For any lesson or unit, a teacher will have broad goals, but will be most successful if they are able to write a list of concrete, observable behavioral objectives that define what it will look like when students have been successful in their learning. In the same way we will want to write our objectives in concrete, observable and behavioral terms (i.e., what will people do? what will it look like?) Using strong action verbs is effective here – just like it is in the classroom. For each of the objectives you will want to use the SMART goal logic.

- **Specific** – Uses strong behavioral verbs and operationalize the task.
- **Measurable** – What can we use to know if the quality or the quantity has changed?
- **Attainable/Assessment Evidence** – What sources of data can we use to determine progress?
- **Responsible person and Resource** – Who owns this objective? And what will they need to support their facilitation?
- **Timeline** - What are the expected increments of progress and what kind of results should we see at each increment?

It is important to focus on observable evidence in these objectives, but a broad range of types of evidence can qualify as reliable, valid and sound. Choose "meaningful" sources even if they may be less tangible (i.e., the way that teachers perceive faculty meetings, or students deal with conflict, etc.) over less meaningful sources that are easy to count.

Figure 9.x: Four-Stage Vision-Driven R-X-O Strategic Planning Process Template
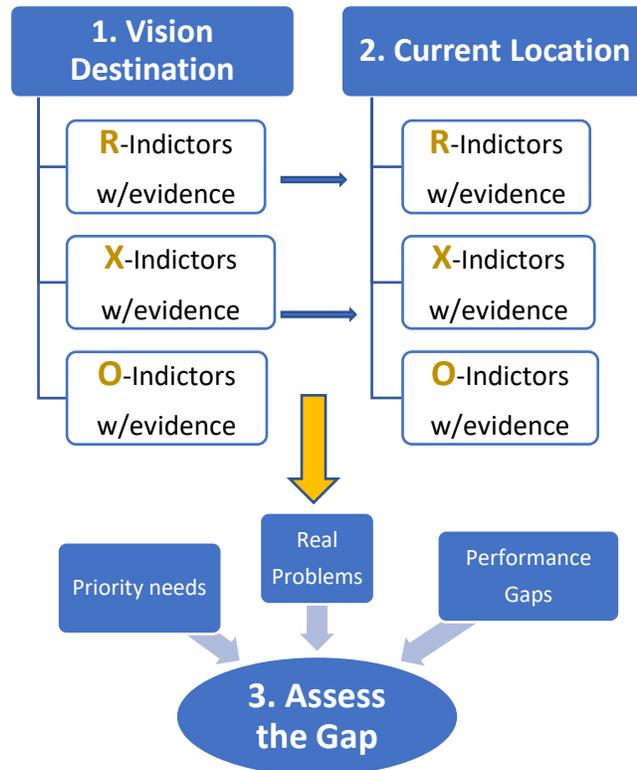
4. **Action Planning with SMART Goals**

Macro Goals/ Micro Objectives	Description w/Evidence	Person(s) Responsible	Timeline	Resources & Roadblocks	Target Change Data/ Evidence
A Coherence issue Goal 1					
Micro Action Objective A1					
Micro Action Objective A2					
B Capacity Issue Goal 1					
Micro Action Objective B1					
C Reference Change Goal 1					
Micro Action Objective C1					
Micro Action Objective C2					
D Real Problem Goal 1					
Micro X Reduction Objective D1					
Micro X Increase Objective D2					
Micro X Increase Objective D3					

Implementing Our Strategic Plan

Thoughtful Completion of the four-step R-X-O strategic planning process will represent both a process as well as a product accomplishment. On the one hand, the process will represent an act of being, functioning as, and gaining comfort with (intellectually and experientially) a 1-Paradigm institution. We will grow from the process itself – so have already moved closer to our desired roadmap location. On the other hand, the work product will represent a valuable articulation of what our journey will ultimately entail. The components and the thinking done in process can be used for multiple other purposes from refining current systems, to clarifying our public relations messages.

Our success in executing the plan will be dependent on the commitment of others. So why does anyone buy in and care about the contents of a plan? We might reflect on our own experience here. What we would probably conclude is that we commit to the extent that 1) the vision that guides that actions steps in the plan are aligned with our own, 2) we trust the leadership and their ability to effect results, 3) the work implied in the plan feels meaningful, valuable and coherent with the rest of my job duties, and 4) we trust that others will do their job too.

The document and the execution process will become more alive when the ownership for its realization is disseminated to the many hands. Those who are in the position to lead aspects of the process should be given that responsibility. Opportunities of progress updates should be built into the meeting schedule. Positive recognitions should be frequent – with the focus on effort not just results. And in general, applying the principles of cultivating trust and vision discussed previously. But we will always need to keep the focus on the big picture, any formal process in which we engage is an opportunity to embody the R's and X's of our desired location, so projecting a pervasive dissatisfaction and impatience with results that are not meeting our expectation will be counter-productive. Demanding can be empowering if the message is – we are better than we are showing (i.e., implying greater potential and a growth orientation), but not so empowering if the message is that we are not acting or achieving adequately (i.e., implies personal criticism, comparison and that we are our results).

Using Data Broadly to Encourage Growth

Outside of the strategic planning process, it will be effective to use data to ground our understanding of our needs and progress. First, it is useful to keep in mind that data is everything. Therefore, on one hand, data is all around us. If we are perceptive, we can see where we are and areas in which we need to grow. On the other hand, we can have biases to our perceptions, or miss attending to important things. Therefore, finding high quality sources of data can ground our perceptions and make our perception more sound and reliable.

So, as a school we need to get in the habit of using data, sharing it and discussing it. It will make the process more effective and less formidable if we view data as neutral and intended to give us benefit. We can learn to fear what the data may say – especially about us personally. Years of high-stakes data use has fueled a lot of this trepidation. Therefore, one of the R's that we need to cultivate is a growth vs. fixed ability orientation toward data – i.e., facing reality. In a fixed ability approach to data we fear it as it will lead to a potential unfavorable comparison – promoting a lot of self-defense and self-denial. In a growth-orientation we see all information as a source of learning, and so we welcome it as useful to our growth. From top to bottom in the school/district organizational chart, we need to ask ourselves how we can promote the conditions in which individuals are comfortable taking on more of a growth orientation toward data of any kind.

Caution: Beware the term "evidence based," as in an "evidence-based program." In practical terms this is almost no guarantee that the program in question would provide value to your process of becoming more functional or moving up the higher levels on the effectiveness roadmap. What the phrase "evidence based" literally means is that in some cases there were schools that showed an overall statistical difference on some variable when the program was implemented. But in many cases what that means was that a school which was functioning in the lower quadrants added the program and as a result got an increased amount of some outcome, such as a short-term bump in test scores, or less of an unwanted outcome such as disruptive behavior. But in some cases, what will support a movement from a 2/10 level of function to a 4/10 temporarily will not necessarily (or even very likely) get a school at a 6/10 level to a 9/10 level. In many cases there are programs, especially in the area of classroom management that will move all schools toward a mediocre 5/10 level of function and performance, whether those schools were originally at 3/10 or 7/10 previously. A good analogy would be that there is evidence that eating at McDonalds hamburgers will reliably make a starving person feel better and more functional, but if a healthy person eats them all the time the result will not be more function and can even lead to poorer health (see the movie Super-size Me). This same analysis applies to the phrases "best practice" and "research based." (See Shindler, 2018).

What Can Data Tell Us?

When judging the value of data, we need to look at it in terms of its soundness and its relevancy. All data will have value, and our job is to find the most meaningful sources. Data is sound to the extent it is valid and reliable. Valid meaning that it answers the right question and leads us into investigating the essential phenomenon. Reliable meaning that it is accurate can be confirmed by other sources. Data can take many forms. Let's examine some of the main sources here, as well as how we can use each of them to better understand our school and to grow.

What do the numbers tell us? Test scores, pass rates, attendance rates, incidence of wanted or unwanted behaviors, student demographic data, etc. are good to know. They are informative. As discussed, we over-emphasize norm referenced measures where our performance is compared to others. These kinds of numbers are lagging indicators of what we have done previously as well as countless other variables that we do not control. So, it is best to pull these data apart and make them available in isolation to the groups for which they would provide the most relevant information. For example, providing standardized math scores to the math teachers, or the 3rd grade reading scores to the 3rd grade teachers. PLC meetings are a great time to process data. But there should be an objective for doing it, and the data should relate to a current initiative of the group.

Case example: **Test Score gains** – In CA and many other states schools were compared to one another by their API – Academic Performance Index. Once this comparison process became public and schools were given incentives and penalties to improve their API's what happened was very natural. In most cases what schools tried to do was to deal with the test scores directly – they added the X's of teaching to the test and providing tutoring on the test subject matter. Referring to our discussion above, these X's could best be characterized as clever direct attempts to address a symptom of a perceived problem. The result in the short-term was slightly higher test scores, but like pulling on a plant, it could only affect the scores so far. So, after a few years, these schools saw their API's plateauing or dropping back down. If the R's and common X's at the schools never changed, the improvement in the numbers was, in the big picture, only superficial. But during this era there were also schools saw improvement in their scores by making meaningful changes in what they did and incorporated more effective R's and X's. A couple of take-away lessons might be 1) we need time to see if any change is substantial or superficial, and 2) assessing what is done (i.e., the X's) in a school is a more reliable predictor of their performance over time than changes in numbers from year to year.

What do surveys tell us?
Surveys are useful in telling us what common perceptions are among the group we surveyed in the areas related to the items that we included on the survey. But with surveys it is often difficult to interpret why or when the perception was formed. If 80% of the students are satisfied with their education at the school, what does that mean? Why or why not, and what are they satisfied with? And are our students just easier or more difficult to satisfy than the students in the next school? So our effort should be to collect survey data that asks the questions that we need to know to answer our question and solve our problems. And it is almost always necessary to combine survey data with at least a little focus group data to contextualize it.

Not all surveys are designed the same way. And different surveys about the same topic can include very different content. Therefore, shop and compare. The SCAI is designed in a way that supports reliability and interpretability by using a rubric structure and with a focus on identifying R's, X's and O's not just perception O's like most surveys. The result is its favorable predictive validity and more meaningful data. The item below is from dimension five related to classroom management and provides insight into both the X's at the school as well as the underlying R's related to empowerment and student voice.

5.e----------O-------------------- O -------------------- O -------------------- O ------------------ O -------------------- O ------------------
I have had some say in making the rules in my class.	The teachers make the rules but consider our feelings.	The teachers resent it when we question why a rule exists.

This item is very predictive of overall climate, function and student achievement at the school. The data obtained from this item would not only help one see if they were moving toward a 1-paradigm location, but also be very predictive of the current location of the school on the roadmap.

What do interviews, focus groups, town halls, and informal conversations tell us?
Because survey percentages, scores, rates, and incident levels cannot tell us very much about causality, we will want to find efficient ways to get at the "why" and "the full story." I am always a little surprised that as educators we often feel hesitate to ask why, but if we are to embrace our growth orientation mindset, and apply it to our data-driven decision making we should be looking for many ways to find out from students and parents what they are thinking.

Moreover, when we engage in focus groups, town halls, informal conversations with the goal of listening it sends a message to everyone that our guiding R includes *wanting to know*. Sometimes there is nothing that we can do to satisfy a request from a stakeholder but letting them know that we care is a concrete action and has value in and of itself. But so often, when we ask, we learn so much. We can learn a lot of little things like a how a minor policy is making parents either really happy or really unhappy. Or we can learn something big like how a majority of the students are afraid of telling the faculty that ___, yet did not know how to bring it up.

On a practical level these can be done rather efficiently. We just need to be sure to find a representative sample of the population of focus. We can invite certain students to a meeting where we provide lunch or give a few teachers a list of questions to ask their students during an appropriate time in the day. And we can just students about how things are going when the opportunity arises organically. Being able to say that "We hear you" and "We are sincerely interested in doing something about it" is a powerful X that will lead any school up. It projects a trust, growth and improvement-oriented R.

Conclusion
The use of data should have an important place in our process of actualizing the potential of our school. Outcomes tell us where we are in our journey and provide evidence of the seeds we have sown to this point. But we need to be sure to use data in meaningful ways and always in the service of our vision. In the next chapter, we will examine the eight areas of school climate and function and explore each for how it can inform our overall process of school improvement.